

## The Focus of Educational Controlling Is Effectivity

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Erlangen (GER), January 2014 - Learning transfer is a dimension that worries most training managers. Erich R. Unkrig, Head of People Development / Deputy VP HR Germany at the technology group Areva, tracks the contribution that qualifying employees through training makes to business success. For him, the pivotal point in the issue is a strong commitment by senior management.

### **What role does ensuring the transfer of knowledge acquired through training play in your organization?**

**Erich R. Unkrig:** AREVA's management and employees are critical in a positive sense in regard to the time invested in learning. They explicitly measure almost all training programs against the question, "Did this investment of time enhance my professional efficiency and effectiveness in the medium and long term?" Our internal clients' "learning KPI" has consistently meant that we undertake constructive measures before, when appropriate during, and definitely after a learning activity to ensure optimal application of the learning content.

### **Why do so many HR people and organizations have such a hard time dealing with a structured system for monitoring their education and training activities?**

**Erich R. Unkrig:** Actually, almost every staff development and training department gathers statistics at the end of a program - even if it's only the satisfaction rate, which I like to call the "happy sheets". The difference is in what's actually done with the figures collected, and this ranges from sophisticated analytical systems to simply "gathering dust" in folders without ever being looked at.

Controlling - that is, systematically monitoring and assessing learning - is often viewed as a "control mechanism" and not as a component of a business-management system, whose main tasks are planning, supervising, and also exercising control when necessary. The last mentioned, though, is certainly not the image that most personnel developers and training managers want to associate with their function. Furthermore, a rather complex understanding of and reliable insight into the company and personnel strategy, as well as the appropriate structures, certainly play a role in establishing a well-functioning system of educational controlling. Here, too, there is a need for improvement on the HR side, especially in the realm of education and personal development.

And relevant measurements are important for the success of the learning process since planning, controlling, and ultimately evaluation are all based upon them. To find and keep track of these indicators is one of the biggest challenges. Certainly there are other significant reasons, such as the fact that the focus of learning is, of course, on people - and thus a "volatile mass" that cannot simply be measured with a meter or gauge or at any one point in time.

## **What do you believe the key parameters of successful educational controlling are?**

**Erich R. Unkrig:** Educational controlling is successful when it focuses on the effectiveness of the individual learning processes. Kirkpatrick's model, which is often cited but rarely put into practice, is a very good framework that any business can adapt for this purpose.

In brief, the steps include measuring

- reaction: learners' satisfaction at the end of the learning process
- learning: for example through tests related to the subjects taught
- behavior: which can be achieved through observation of the skills that have been successfully transferred to the workplace, and
- results: that is, assessment of business success by gathering statistical information about factors that have been influenced by the learning process. This can include investment success by calculating, for example, the ROE (Return on Education) or, as I call it, the ROCD (Return on Competence Development).

The explanatory power of the first step, learner satisfaction, is often overestimated. At the end of a training program, there are simply too many variables that have nothing to do with learning success. These include, for example, the atmosphere in the study group, the "entertainment value" of how the learning material was presented, and the venue of the event (the accommodations, the service, etc.). Learning is obviously a medium-to-long-term process, and spontaneous feedback is hardly appropriate.

Therefore, I basically always recommend, "Sleep on it, and then give your feedback." This type of minimalist controlling approach is mainly done by trainers and training institutes. They are the last ones who have an opportunity to get documented assessment from the learners, but it usually has nothing to do with how successful the learning was, but is rather for their own reputation and marketing.

## **What type of foundation should an organization create in order to achieve successful learning transfer and educational controlling?**

**Erich R. Unkrig:** This is easy to describe, but it certainly can't be implemented without stumbling blocks. I usually do this in regard to the following five factors, which I describe for the sake of clarity as inhibitors or obstacles.

- obstacles related to knowledge: the overall strategic context is unclear; there is no clarity of purpose; milestones are unclear; and job duties are unclear
- obstacles related to what is permitted: freedom to implement what has been learned; unavailability of the resources necessary to perform the task
- obstacles related to mastery: a lack of important skills, abilities, competences, and experience
- obstacles **related to desire**: a lack of preferences; insufficient challenges and excessive demands; lack of motivation
- obstacles **related to duties**: a lack of knowledge about implicit or explicit "rules" in the target group or in the company; a lack of knowledge about standards (e.g. in quality or training management); ignorance of corporate strategies and goals.

Group athletics in the morning as a team-building activity or having a high-level representative of the company as a guest at dinner or in the evening around the fireplace are,

in my experience, things that can really bring true inspiration to the classic nine-to-five training day.

And the "controlling" of successful training begins with managers who simply must care about what the employees have learned and that the knowledge has become part of everyday working life. This interest then has to be manifested in a concrete evaluation during the annual appraisal interview at the very latest. (What did we agree upon was to be improved and why, and has the learning process made a positive contribution how things are going today?)

In organizations in which training-knowledge transfer has been successfully ensured, educational management and staff development will become actively involved in the learning process, its results, and its achievements. As a result, numerous issues will become clear: Are employees who participated in training programs more successful than those who didn't? Have any of the training programs produced a positive impact on our "talent pipeline", on employees' career steps or paths, or on employee satisfaction and retention? These are core questions that demand responses.

### **Is there a way to compare measurable quantities with less tangible parameters?**

**Erich R. Unkrig:** Metrics and indicators always depend on the specific business, industry, and the state of corporate development and strategy. The answers lie in performance, motivation, and retention.

Depending on the KPI, measurements can be analyzed via the HR information system (e.g., rate of unplanned turnover, succession planning, internal mobility and flexibility, etc.). Analyses such as employee surveys can also help. At AREVA, we call the latter the Voice of Employees (VOE) or "exit interviews", which are the final interview with people who have unexpectedly decided to leave the company. However, I find the most important tool to be the appraisal interviews, which are often both a stimulus for (further) education and skills development as well as the participants' evaluations of the programs they've completed.

### **What contribution can eLearning applications offer to a consistent educational controlling effort?**

**Erich R. Unkrig:** The way I understand things, eLearning has no particular contribution to make to educational controlling because it's a learning method or approach. A well conceived eLearning program simplifies the testing of cognitive knowledge, and here I'm not referring to most of the eLearning programs I've seen; namely, an animated PowerPoint slideshow with or without an embedded video is not didactically meaningful eLearning.

In this context, I don't want to address the challenges related to employee participation in decisions about educational controlling. I have my doubts, though, whether it actually contributes to making educational controlling more consistent!

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