

# Using Objective Mapping to Link Your Training to Business Objectives

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## **Learning Objectives:**

- **Develop an Objective Map that links business, performance, and learning objectives**
- **Apply the Objective Mapping process to facilitate program stakeholder communication**
- **Assess program enablers and barriers to program success**

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## ***Levels of Evaluation - Just in Case***

***Reaction*** (level 1)- participants reactions to the program

***Learning*** (level 2) - knowledge, skills or attitudes acquired from program

***Job Performance*** (level 3) - transfer taken place

***Business*** (level 4) - the business impact achieved

***ROI*** (level 5) - the return on investment realized

## ***Some Key Challenges***

- ◆ Programs are asked for or developed without clear business and performance objectives
- ◆ Stakeholders' expectations are unclear
- ◆ Training designers do not understand the business and perhaps the job environment
- ◆ Business does not understand the job environment
- ◆ Business does not understand training's role
- ◆ Participants do not understand the investment being made in them
- ◆ Management does not understand their role in reinforcing training

***What can be done?***

## ***We Need Some Help***

We need:

- ◆ A method to establish communication among stakeholders
- ◆ A way to link program objectives
- ◆ A performance-based guide for the training designer/developer
- ◆ A way to anticipate enablers and barriers
- ◆ A way to anticipate and guide the ROI

## ***The Objective Map™***

- ◆ A tool developed and used successfully at Bell Atlantic
- ◆ Gave direction to the business to develop business objectives
- ◆ Gave direction to the field personnel to develop performance objectives to meet the business objectives and to voice potential barriers
- ◆ With clearly defined performance requirements, the training designers were off and running
- ◆ Gave the evaluator the chance to oversee the development, delivery and implementation to help ensure a positive ROI

# Objective Map Template

1 Business Objectives	2 Metric	3 Enablers/ Barriers	4 Performance Objectives	5 Measurement Methodology	6 Enablers/ Barriers	7 Learning Objectives	8 Measurement Methodology	9 Enablers/ Barriers
1.			1a.			1.a.1. 1.a.2. 1.a.3.		
			1b.			1.b.1. 1.b.2. 1.b.3. 1.b.4.		
2.			2.a.			2.a.1. 2.a.2. 2.a.3.		
			2.b.			2.b.1. 2.b.2. 2.b.3.		
			2.c.			2.c.1. 2.c.2. 2.c.3.		
3.			3.a.			3.a.1. 3.a.2.		
			3.b.			3.b.1. 3.b.2.		
			3.c.			3.b.3. 3.c.1. 3.c.1.		
			3.d.			3.c.2. 3.d.1. 3.d.2. 3.d.3. 3.d.4.		

## ***Objective Template Program Objectives***

**Business Objectives** - *Reduce* overtime by 30%

**Performance Objectives** - *Complete* assembly assignments on time in 90% of the cases, using the tools required. . .

**Learning Objectives** - For each simulation, *assemble* components using the procedures from the component manual . . .

## ***Other Business Objective Examples***

- ◆ *Increase* customer satisfaction index by 25%
- ◆ *Reduce* turnover (or absenteeism) 15%
- ◆ *Reduce* grievances by 25%
- ◆ *Generate* 45% more reports
- ◆ *Reduce* meeting time by 10%
- ◆ Others . . .

## *Objective Template Business Metrics*

### *Hard Data*

- ◆ Output
- ◆ Costs
- ◆ Time
- ◆ Quality

### *Soft Data*

- ◆ Work Habits
- ◆ Work Climate
- ◆ Feelings/Attitudes
- ◆ New Skills
- ◆ Development/Advancement
- ◆ Initiative

### *Examples of Hard Data*

#### OUTPUT

- Units Produced
- Tons Manufactured
- Items Assembled
- Money Collected
- Items Sold
- Forms Processed
- Loans Approved
- Inventory Turnover
- Patients Visited
- Applications Processed
- Students Graduated
- Tasks Completed
- Output Per Hour
- Productivity
- Work Backlog
- Incentive Bonus
- Shipments
- New Accounts Generated

#### TIME

- Equipment Downtime
- Overtime
- On Time Shipments
- Time to Project Completion
- Processing Time
- Supervisory Time
- Break in Time for New Employees
- Training Time
- Meeting Schedules
- Repair Time
- Efficiency
- Work Stoppages
- Order Response
- Late Reporting
- Lost Time Days

#### QUALITY

- Scrap
- Waste
- Rejects
- Error Rates
- Rework
- Shortages
- Product Defects
- Deviation From Standard
- Product Failures
- Inventory Adjustments
- Time Card Corrections
- Percent of Tasks Completed Properly
- Number of Accidents

#### COSTS

- Budget Variances
- Unit Costs
- Cost By Account
- Variable Costs
- Fixed Costs
- Overhead Cost
- Operating Costs
- Number of Cost Reductions
- Project Cost Savings
- Accident Costs
- Program Costs
- Sales Expense

## Examples of Soft Data

### WORK HABITS

- Absenteeism
- Tardiness
- Visits to the Dispensary
- First Aid Treatments
- Violations of Safety Rules
- Number of Communication Break-downs
- Excessive Breaks
- Follow-up

### WORK CLIMATE

- Number of Grievances
- Number of Discrimination Charges
- Employee Complaints
- Job Satisfaction
- Employee Turnover
- Litigation

### FEELINGS/ATTITUDES

- Favorable Reactions
- Attitude Changes
- Perceptions of Job Responsibilities
- Perceived Changes in Performance
- Employee Loyalty
- Increased Confidence

### NEW SKILLS

- Decisions Made
- Problems Solved
- Conflicts Avoided
- Grievances Resolved
- Intention to Use New Skills
- Counseling Problems Solved
- Listening Skills
- Interviewing Skills
- Reading Speed
- Discrimination Charges Resolved
- Frequency of Use of New Skills

### DEVELOPMENT/ADVANCEMENT

- Number of Promotions
- Number of Pay Increases
- Number of Training Programs Attended
- Requests for Transfer
- Performance Appraisal Ratings
- Increases in Job Effectiveness

### INITIATIVE

- Implementation of New Ideas
- Successful Completion of Projects
- Number of Suggestions Submitted
- Number of Suggestions Implemented
- Work Accomplishment
- Setting Goals and Objectives

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## Objective Template Business Objectives

### *Enablers*

- Incentive Programs
- New Product Line
- Reorganization
- Marketing Programs
- Process Improvements
- Other . . .

### *Barriers*

- Communication Problems
- Grievance Process
- Lack of Personnel and Material Resources
- Appraisal Process
- Public Perception
- Other . . .

## ***Objective Template Program Objectives***

**Business Objectives** - *Reduce* overtime by 30%

**Performance Objectives** - *Complete* assembly assignments on time in 90% of the cases, using the tools required. . .

**Learning Objectives** –For each simulation, *assemble* components using the procedures from the component assembly manual . . .

## ***Other Performance Objective Examples***

- ◆ *Ask* correct questions on customer calls . . .
- ◆ *Create* priority checklist for meetings . . .
- ◆ *Consult* supervisor before modifications are made . . .
- ◆ *Follow up* on each help desk call and ensure problems are solved . . .
- ◆ Others. . .

***Objective Template  
Performance Objectives  
Measurement Methodology***

- ◆ Control versus experimental group design
- ◆ Participant/management surveys
- ◆ Observations
- ◆ Action planning
- ◆ Interviews
- ◆ Focus groups

***Objective Template  
Performance Objectives***

***Enablers***

- Technology
- On-the-job aids
- Supervisor reinforcement
- Help lines
- Performance Reviews
- Other . . .

***Barriers***

- Technology not ready
- Lack of management support
- Workload
- Insufficient time to use new skills
- Insufficient prerequisite skills
- Other . . .

## ***Objective Template Program Objectives***

**Business Objectives** - *Reduce* overtime by 30%

**Performance Objectives** - *Complete* assembly assignments on time in 90% of the cases, using the tools required. . .

**Learning Objectives** –For each simulation, *assemble* components using the procedures from the component manual . . .

## ***Other Learning Objective Examples***

- ◆ *List* selection choices . . .
- ◆ Given behaviors, *identify* personality type indicator . . .
- ◆ *Select* most effective solution to given problem . . .
- ◆ *Calculate* ROI using formula provided . .
- ◆ Others . . .

***Objective Template  
Learning Objectives  
Measurement Methodology***

- ◆ Knowledge based test
- ◆ Performance based test
- ◆ Action planning

***Objective Template  
Learning Objectives***

***Enablers***

- Media type
- Knowledgeable instruction
- Supervisor support
- Exercises
- Participant selection
- Other . . .

***Barriers***

- Insufficient time
- Program materials too expensive
- Wrong audience
- Job distractions
- Exercises not relevant to real world
- Other . . .

## ***Objective Map Implementation***

- Step 1:* Convene task force: (1)Business owner, (2) Field personnel, (3)Training manager/designer, (4) Evaluator
- Step 2:* Discuss business problems and performance solutions
- Step 3:* Business owner complete columns 1 and 3
- Step 4:* Field personnel, complete columns 4 and 6
- Step 5:* Training manager/designer complete columns 7 and 9
- Step 6:* Evaluator complete columns 2, 5 and 8
- Step 7:* Meet as needed to complete/revise map based on changing issues or information

## ***Objective Map Guidelines***

- ◆ There must be at least one performance objective for each business objective
- ◆ There must be at least one learning objective for each performance objective
- ◆ If there is no performance objective for a learning objective, eliminate the learning objective
- ◆ If there is no business objective for a performance objective, eliminate the performance objective

1	2	3	4	5	6	7	8	9
Business Objectives	Metrics	Enablers / Barriers	Performance Objectives	Measurement Method	Enablers/ Barriers	Learning Objectives	Measurement Method	Enablers/ Barriers
1. Reduce turnover rate by 25%	Cost savings due to reduction in turnover of subordinates	<b>Barrier:</b> Hiring Competition	1a. Communicate using positive language 1b. Determine when subordinates need assistance 1c. Conduct effective individual meetings	One-shot program evaluation design  Follow-up questionnaire And Action Plan  Isolation Technique: Participant Estimates	<b>Barrier:</b> Workload  <b>Enabler:</b> Meeting checklist	1a1 and 1c1. Distinguish between negative and positive phrases 1a2 and 1c2. Provide examples of positive responses to different real-life scenarios 1a3 and 1b1. Recognize different learning styles and personality types in others 1a4 and 1b2. Learn your own learning style and personality type 1b3. Recognize verbal cues indicating assistance is required. 1b4. Recognize non-verbal cues indicating assistance is required. 1c3 and 2a1. Use active listening techniques	Knowledge-based pre/post tests	<b>Barrier:</b> Insufficient time  <b>Enablers:</b> (1) on-line scenarios (2) practice exercises
2. Increase individual efficiency and increase productivity	Cost savings due to reduction in time spent in meetings  Productivity increase (percent set by each individual unit)	<b>Barrier:</b> Overtime incentives  <b>Enabler:</b> On-time completion incentives	2a. Conduct productive team meetings 2b. Provide personality type tests to team members effectively 2c. Complete Action Plan	Follow-up questionnaire and Action plan  Isolation Technique: Participant Estimates	<b>Barrier:</b> Transfer design  <b>Enabler:</b> not planned	2a2. Open meetings with clearly stated goals 2a3. Encourage group participation 2a4 . Keep discussion on track 2b5. Close meetings with clearly stated follow-up actions 2b1. Administer Myers-Briggs Personality Indicator Tests 2b2. Explain the meaning of the results 2b3. Explain the importance of the results for team effectiveness 2c1. Determine areas for improvement 2c2. List specific goals to ensure improvement of determined areas 2c3. List resources required for goal completion 2c4. List deadlines for meeting goals listed 2c5. Communicate action plan to supervisor Etc.	Performance-based simulated proficiency	<b>Enablers:</b> (1) on-line scenarios (2) practice exercises

Figure 1. Example Leadership Program Objective Map©

1	2	3	4	5	6	7	8	9
Business Objectives	Metrics	Enablers / Barriers	Performance Objectives	Measurement Method	Enablers/ Barriers	Learning Objectives	Measurement Method	Enablers/ Barriers
1. Decrease repeat calls by at least 5%.	Decreased truck rolls and decreased calls into call center.	<p><b>Barrier:</b> Not enough previous information on how many calls took place.</p> <p>Inconsistent tech numbers – data base issues.</p> <p><b>Enabler:</b> Electronic Data Warehouse where the data is stored.</p>	<p>1a. Exhibit professionalism and have efficient interactions with all customers.</p> <p>1b. Use the right tools for the right job in a safe and efficient manner.</p> <p>1c. Follow the procedures for the proper and efficient installation of all drop system material to Charter specifications.</p> <p>1d. Follow the proper and efficient methods for installations in MDUs.</p> <p>1e. Adhere to all the correct codes for installation of coax cable to and on the home.</p> <p>1f. Use correct bonding procedures for effective grounding of our services.</p> <p>1g. Properly connect all CPE.</p> <p>1h. Use efficient troubleshooting techniques to resolve problem the first time.</p>	<p>Call back rate per individual employee tracking report from the EDW.</p> <p>Compare two-month rates leading up to training with two month rates immediately following.</p>	<p><b>Barriers:</b> (1)Lack of motivation back in system to practice new skills.</p> <p>(2)Skills not reinforced by supervisors.</p> <p><b>Enablers:</b> (1)Pride in work.</p> <p>(2)Skills reinforced by supervisors.</p>	<p>1a1. Demonstrate the importance of accuracy, clarity and empathy in customer interactions.</p> <p>1a2. Demonstrate effective customer communication skills.</p> <p>1b1. Identify required tools and materials used for installations.</p> <p>1b2. Describe proper use and care of all tools and equipment.</p> <p>1c1. Demonstrate proper use of all approved. Charter materials used for installations.</p> <p>1c2. Demonstrate correct procedures for installing drop system from tap to CPE.</p> <p>1d1. Demonstrate installation procedures for an MDU.</p> <p>1e1. Describe correct drop clearances and installation specifications.</p> <p>1f1. Demonstrate correct bonding procedures for grounding of service.</p> <p>1g1. Demonstrate proper connection of CPE in the home.</p> <p>1h1. Demonstrate correct troubleshooting procedures.</p> <p>1h2. Demonstrate proper use of SLM, DMM, and TDR.</p>	<p>Pre-course written assessment compared to post-course written assessment.</p> <p>Practical hands-on in-class assessment.</p>	<p><b>Barrier:</b> Learner not prepared for class (not equipped with tools and equipment for class).</p> <p><b>Enabler:</b> Typically an off-site classroom to help participants stay focused on the course.</p>

Figure 2. Example Technical Program Objective Map©

1	2	3	4	5	6	7	8	9
Business Objectives	Metrics	Enablers / Barriers	Performance Objectives	Measurement Method	Enablers/ Barriers	Learning Objectives	Measurement Method	Enablers/ Barriers
1. Improve Customer Satisfaction by 90%	Reduction in customer complaints	<i>Enabler:</i> New product line <i>Barrier:</i> Weak market	1a. Opens call IAW established procedures 1b. Demonstrates interest in caller's needs 1c. Closes call with correct understanding of actions to be taken	Observation using an Observation Checklist  Follow-up Questionnaire  Isolation Technique: Control Group versus Experimental Group	<i>Enablers:</i> Training, job performance incentives	1a1. Greet caller with standard company opening 1a2. Introduces self 1b1. Uses enthusiastic tone of voice(friendly, positive, non-monotone voice—happy, upbeat, cheery, pleasant) 1b2. Listens to customer without interrupting 1c1. Conveys empathy 1c2. Asks for customer's perspective 1c3. Probes for agreement 1c4. Restates agreed upon follow-up actions to be taken	Knowledge-based test  Simulated Observation using an Observation Checklist	<i>Barrier:</i> Lack of practice time  <i>Enabler:</i> realistic simulation
2. Reduce Escalations by 80%	Cost savings due to reduction in time required of team leader and processing clerk		2a. Diagnosis customer's problem or need correctly 2b. Gains customer agreement of follow-up actions that need to be taken	Observation using an Observation Checklist  Follow-up Questionnaire  Isolation Technique: Control Group versus Experimental Group	<i>Barrier:</i> Lack of supervisor support	2a1. Defines purpose of call 2a2. Communicates what the initial plan will be 2a3. Asks customer probing questions 2a4. Uses company Problem Questions Checklist 2a5. Asks what has been tried before in resolving problem 2a6. Asks about timing issues 2b1. Checks back with the customer to make sure rep understands issue/confirms to ensure understanding 2b2. Summarizes call 2b3. Probe for agreement on any follow-up steps	Knowledge-based test  Simulated Observation using an Observation Checklist	<i>Barrier:</i> Lack of practice time  <i>Enabler:</i> realistic simulation

Figure 3. Example Sales/Customer Service Map©

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## ***Value of Objective Mapping™***

- ◆ A tool to harness the knowledge of program stakeholders
- ◆ After first program, appreciation for value is realized
- ◆ Stakeholders begin to become more appreciative and involved in each others' challenges
- ◆ Becomes easier and easier to use
- ◆ Completion helps to ensure transfer and business value
- ◆ Helps training designers do what they do best by giving them the performance objectives for program design
- ◆ Helps evaluators use their skills to ensure a positive impact

## ***References***

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