

Measuring Instructional Design Outcomes: An Overview



Evaluation links design intent to evidence of change



Distinguish learning, behavior, and business outcomes before choosing measures



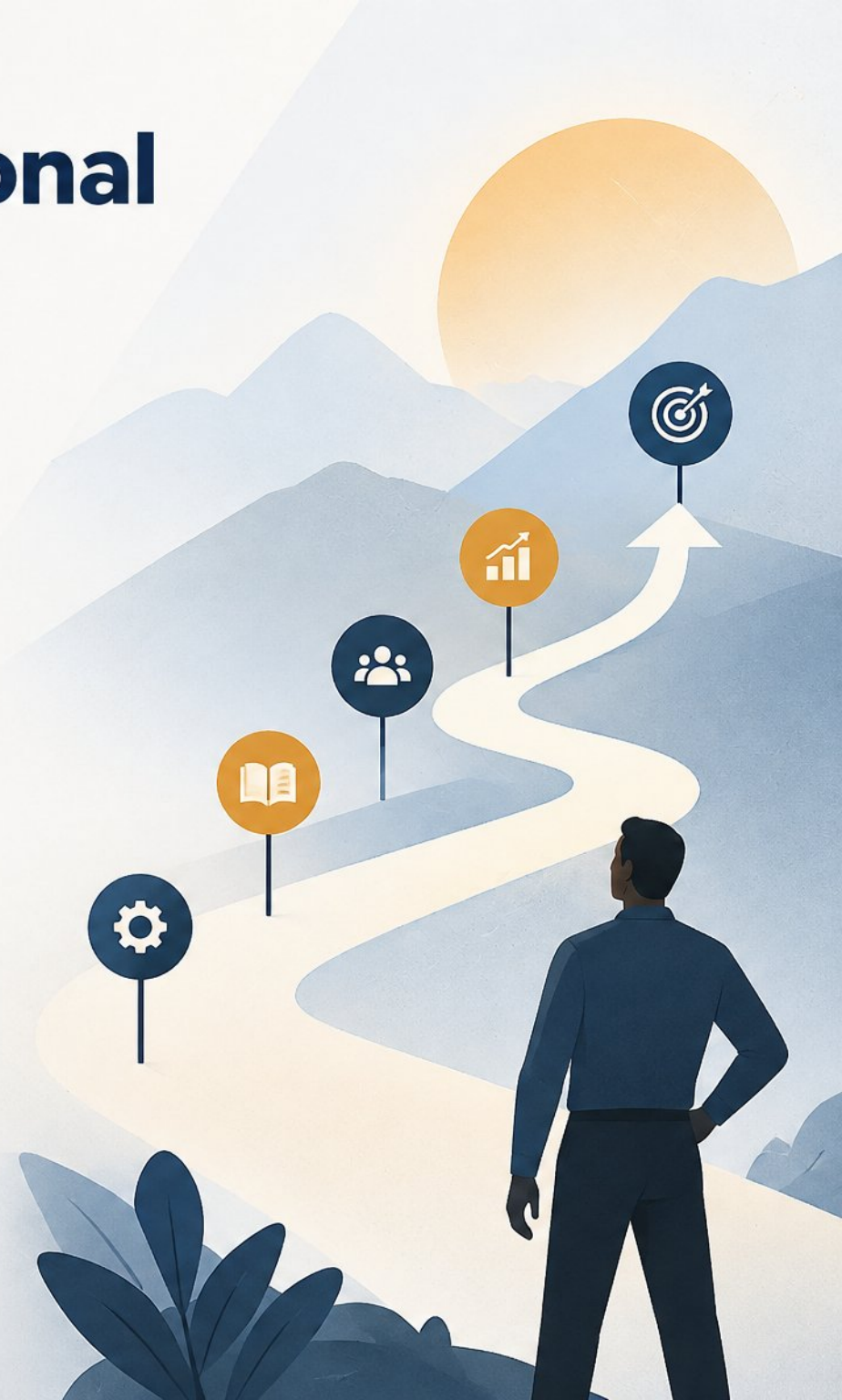
2026: 98% of L&D want impact data; only 1 in 4 fund measurement



Completion rates and smile sheets show activity, not impact



Roadmap: frameworks, design, data collection, analysis, reporting, culture



Background:

The Measurement Paradox and the Analytics Divide



98% want to quantify learning impact; only ~1 in 4 fund measurement



Barriers: competing priorities (40%), capability gaps (20%), data access (17%)



Most measure Kirkpatrick Levels 1–2; few reach Levels 3–4



Analytics divide: only ~14% use advanced analytics; others rely on LMS activity metrics



2026 stakes: skills training, AI capability, tighter budgets demand defensible evidence

Agreement that evaluation matters

98%

Want to quantify learning impact

~1 in 4

Fund measurement

Kirkpatrick levels measured

Levels 1–2

Levels 3–4

Measurement budget



Core Evaluation Frameworks and How They Differ

Kirkpatrick

- Kirkpatrick's four levels—Reaction, Learning, Behavior, Results—remain the shared language



Preferred by HR

Phillips

- Phillips adds ROI: isolate effects, convert benefits to money, capture fully loaded costs



Favored by finance

Brinkerhoff

- Brinkerhoff's Success Case Method interviews top and low performers to learn why



Responds to sponsors

LTEM

- LTEM's eight tiers stress retention, decision-making competence, task competence, and transfer



Focus on broader impact

Selection heuristic:



HR prefers Kirkpatrick

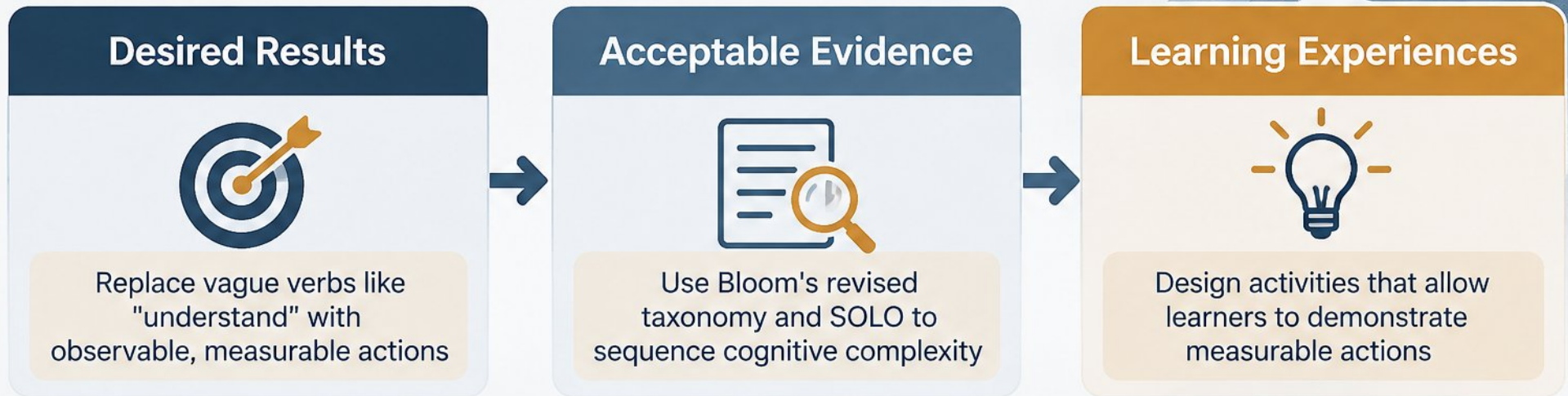


finance favors Phillips



sponsors respond to Brinkerhoff stories

Designing for Measurable Outcomes from the Start



- Backward design: desired results, then evidence, then learning experiences
- Replace vague verbs like "understand" with observable, measurable actions
- Use Bloom's revised taxonomy and SOLO to sequence cognitive complexity
- Constructive alignment: every objective needs a matching activity and assessment
- Build an alignment map now—one row per objective—to expose misalignment early

Alignment Map

Objective	Activity	Assessment

Data Collection Methods and Instruments



MEASURE
UNDERSTAND
IMPROVE



Match method to level:
quantitative or qualitative,
formative or summative



Instruments: surveys, pre/post tests,
scenario assessments, observation
checklists, interviews, focus groups,
performance records



Level 1 surveys: capture relevance,
engagement, confidence, intent to apply



Pilot items; check validity, reliability,
fairness, social desirability and recall bias



Plan triangulation early; fight survey
fatigue by closing the loop



Measuring Reaction and Learning



Level 1

- satisfaction, engagement, relevance, and perceived usefulness
- Automate surveys immediately after training; target 70–80% response rates



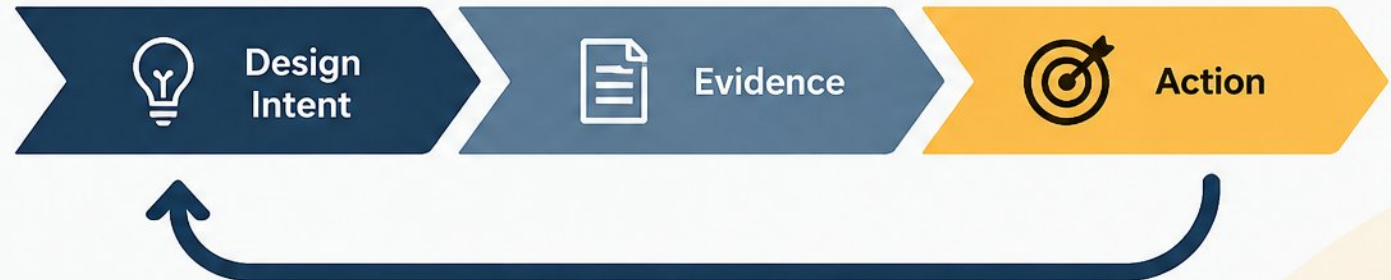
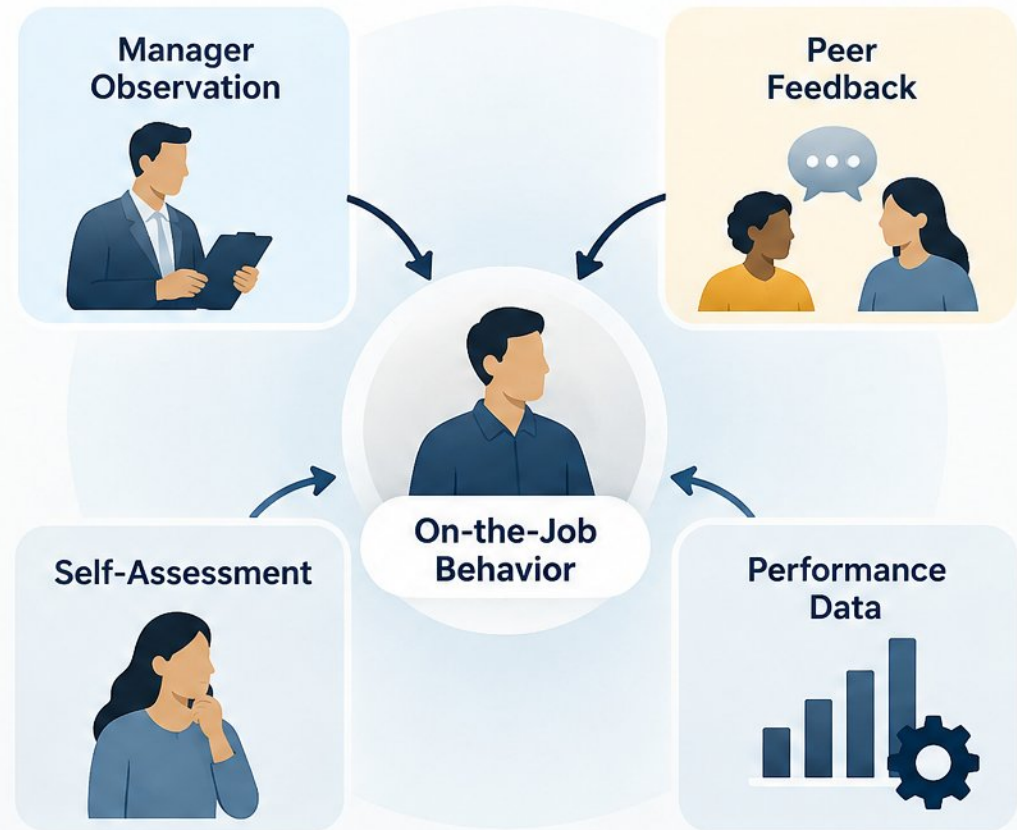
Level 2

- knowledge, skills, attitude, confidence, and commitment
- Use pre/post tests, skill demonstrations, and scenario-based assessments
- Retrospective pre/post when learners overestimate starting knowledge
- Report learning gains, not raw scores: percentage improvement and effect size
- Add a 30-day delayed assessment to detect the forgetting curve



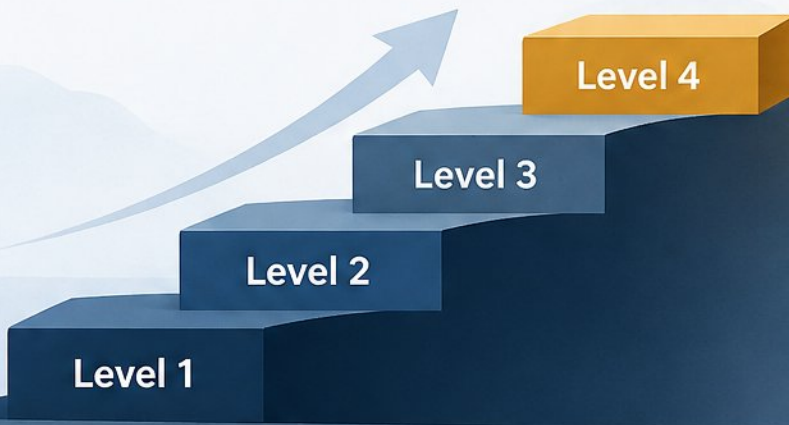
Measuring Behavior and Transfer

- **Level 3:** Do participants apply what they learned on the job?
- Sources: manager observation, peer feedback, self-assessment, performance data
- Behavior becomes observable 60–90 days after training; use multiple checkpoints
- Track frequency, quality of use, barriers, and enablers
- If learning happened but behavior didn't, examine the transfer environment



Measuring Results and Calculating ROI

- Level 4 links training to business metrics: productivity, quality, revenue, retention, safety
- Isolate training's effect with control groups, trend lines, or adjusted estimates
- Convert benefits to money, fully load costs, then calculate ROI
- Phillips guiding principles: use conservative alternatives and adjust for estimation error
- Apply Levels 4 and 5 selectively to strategic, high-cost programs

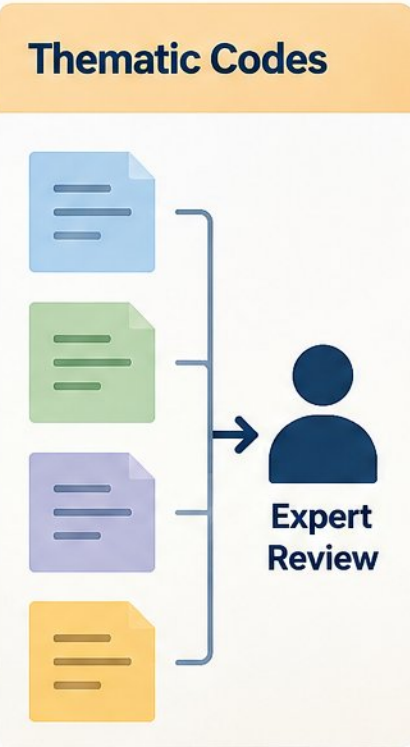


Analyzing and Interpreting Evaluation Data



- Begin with **descriptive statistics** and **trend analysis**
- Add **correlation and effect sizes** only when design supports it
- **Code qualitative themes**; use AI-assisted flows with expert review
- **Triangulate sources** with a matrix to reveal gaps and convergence
- **Separate statistical from practical significance**; treat divergence as clues
- Turn findings into specific, **evidence-tied recommendations**

Triangulation Matrix			
	Quantitative Sources	Qualitative Sources	Other Sources
Evaluation Question 1	●	●	▲
Evaluation Question 2	✗	●	▲
Evaluation Question 3	●	✗	▲



Reporting and Communicating Results



Tailor reports by audience:

executives need business summaries;
program owners and instructors need detail



Avoid clutter, meaningless variety, and overdecorated charts; use clear data visualization and dashboards



Structure reports: executive summary, methodology, findings, then recommendations



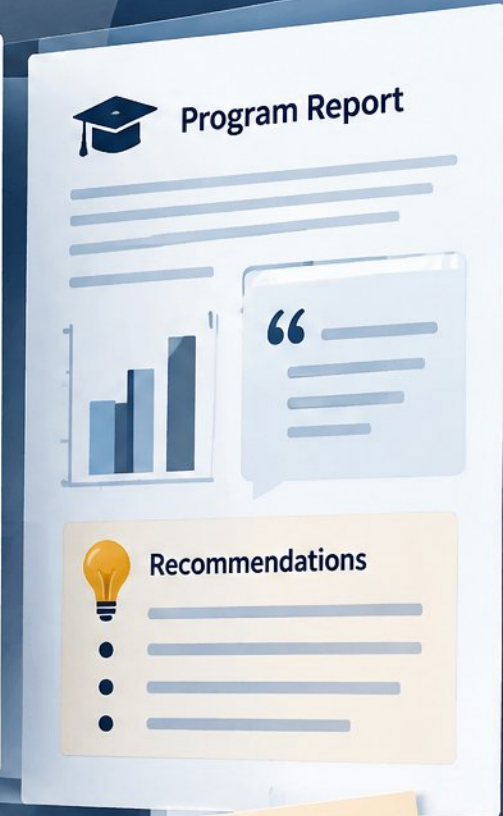
Combine headline metrics with curated stories and participant quotes



Use results to influence decisions and advocate for resources



Guard against false cause claims when other factors explain the outcome



Overcoming Barriers and Building a Measurement Culture



Top barriers: time, competing priorities, data access, capability gaps, thin buy-in



Level 0 check: team readiness, process clarity, alignment, resources



Evaluation is a team sport — executives, managers, HR, IT, finance, operations



Run a measurement audit; target one or two business-aligned programs



Start with a friendly partner for an early proof point



Embed measurement into the design lifecycle and business routines

Level 0



Team readiness



Process clarity



Alignment



Resources

CHECK BEFORE TAKEOFF



From insight to greater impact

Practical Application: Building Your Measurement Plan



Define the target business outcome before choosing any measures



Capture objective, questions, measures, methods, timing, owners, cadence on one page



Use an alignment map: every objective needs a matching activity and assessment



Crawl-walk-run: reliable Level 1-2 data plus one business metric, then expand



Peer review: does the framework match your stakeholders?

Your Measurement Plan (One Page)

Objective	Evaluation Questions	Measures	Methods	Timing	Owners	Cadence

Crawl-Walk-Run



Practice Workshop: Peer Review and Action Planning



In small groups, stress-test plans: Is the outcome defined in business terms?



Verify each objective has evidence, each measure an owner, each timing window the right level



Name one behavior observable at 60-90 days and one leading indicator



Draft a personal action plan: first step, pilot scope, 90-day milestone



Commit to one reporting cadence tied to existing business reviews



Wrap-Up: Key Takeaways and Continuous Improvement



Frameworks structure the conversation; data and collaboration create evidence



Start with the business question, not satisfaction scores



Plan measurement into design; be transparent about attribution limits



Use insights to improve programs and decisions, not only prove value



Maturity grows incrementally: better evidence, more useful insights



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