

**ADVANCE PRAISE FOR
*PERFORMANCE-FOCUSED
SMILE SHEETS***

Only a few people combine the rigor of a researcher and the usability of a how-to writer. Will Thalheimer is the best among them. He has done it again in his *Performance-Focused Smile Sheets*. Will has undertaken an audacious project. This book is the beginning of a radical revolution for professionalizing our field. Sign me up.

Sivasailam Thiagarajan, PhD
Principal and “Mad Scientist” at The Thiagi Group

In a 160 plus billion dollar training industry, debunking and reconstructing traditional smile sheets is way overdue. Kudos to Will Thalheimer for leading the way!

Ruth Colvin Clark
Clark Training & Consulting

Will Thalheimer attacks one of the most intractable misconceptions in our field, and does so with authority and humor. His straight-shooter approach to improving smile sheets is a wake up call for the field. Thalheimer’s prescription is easily understandable and makes perfect sense. And, any book that equates learning measurement to pure sex has to be a must read!

Marc J. Rosenberg, PhD
Marc Rosenberg and Associates

What we need in Learning and Development is nothing short of a revolution in the way we evaluate training. The current approach—which in most companies is limited to end-of-class smile sheets—needs to be thrown out. In *Performance-Focused Smile Sheets*, Dr. Will Thalheimer presents revolutionary ideas, as well as practical guidelines and examples for transforming a useless exercise into one of real value and impact. Read this book and you will want to join Will on the front lines of change.

Roy Pollock, DVM, PhD
Chief Learning Officer, 6Ds® Company
co-author of *Six Disciplines of Breakthrough Learning*

Will Thalheimer, one of our most reputable translators of research into practice, has written his first book, a readable treatise on that scourge of learning, smile sheets. This insightful (and inciteful) work aptly skewers current approaches and provides a healthy alternative that both helps us now and educates us to do better going forward. A valuable contribution indeed!

Dr. Clark Quinn
Executive Director of Quinnovation
author of *Revolutionize Learning & Development*

In our field there can be a lot of hand-waving – general advice without clear application guidelines. Will’s book is exactly the opposite. He gives you the deep-dive on level 1 training evaluations, including both the how and the why. This is evidence-based practice at the master level.

Julie Dirksen
Author of *Design For How People Learn*

It’s about time that someone took the ubiquitous but mostly useless end-of-session training feedback questionnaire to task. Will Thalheimer does a great job of telling us why the current practice doesn’t work and replaces it with thoughtful and sensible advice for feedback tools that will provide valid and actionable data.

Robert O. Brinkerhoff
Professor Emeritus, Western Michigan University
& Director, Brinkerhoff Evaluation Institute

With this book, Will Thalheimer provides an important contribution, particularly in showing how to ensure that learner feedback provides a true gauge of on-the-job success. The book is research-based, comprehensive, and based on real world experiences. If you're spending time and money in using smile sheets, this book will show you how to make them valuable, useful, and relevant to your organization's success.

Jack J. Phillips
Chairman, ROI Institute

Freakin' revolutionary or business smart? Will Thalheimer's position is that smile sheets are a waste unless they're designed to predict a change in job behavior – an idea that's refreshing, worthwhile, and, as the book demonstrates, actionable too! I encourage you to read *Performance-Focused Smile Sheets* and reflect on how you might improve the feedback your organization captures from its learners.

Judith Hale, PhD, CPT, ID (SEL, ILT, JA+)
Co-founder Institute for Performance Improvement

Will Thalheimer's work is grounded in research, honed through experience, and organized to provide a practical perspective for application. In *Performance-Focused Smile Sheets* Will dissects the current failure of learner-feedback instruments and provides an alternative perspective on what will work; as well as arguments you can use to change organizational cultures that remain wedded to these inaccurate metrics.

William Coscarelli
Professor Emeritus,
Southern Illinois University

Will Thalheimer, PhD, is one of the definitive myth busters in our field, and he does it with great precision but also humor. It's good that he's explaining the things we need to know about smile sheets, because there are just too many fairytales. We must be held to a higher standard.

Patti Shank, PhD
Author and Learning Analyst
PattiShank.com

It is hard to do, but Will Thalheimer has found a way to make the measurement of learning sexy and exciting in his book *Performance-Focused Smile Sheets*. You'll find yourself turning the pages and laughing along the way (usually at your own past mistakes, which you won't make again after reading this book).

Ryan Watkins
George Washington University

Finally, a book that acknowledges and addresses the dirty and widespread problem with smile sheets, which typically tell us nothing useful and focus our attention on the wrong things. Will Thalheimer's book provides useful guidance for using this tool correctly, in ways that improve learning and its transfer to the workplace in ways that produce valued performance. Anyone involved in workplace learning and performance will find this book valuable.

Steven W. Villachica, PhD
Associate Professor
Boise State University

If you are responsible for evaluating training, stop right now and read "Performance-Focused Smile Sheets". The insights and ideas will change forever how you create evaluations. Quite simply, the BEST book on smile sheet creation and utilization, Period!

Karl M. Kapp
Professor of Instructional Technology
Bloomsburg University

What I like most about Thalheimer's book on Performance Focused Smiles Sheets is that it puts the focus where it belongs, predicting subsequent performance on the job—the ultimate measure of learning in an enterprise context. An excellent resource for all Learning Professionals!

Guy W. Wallace
President, EPPIC Inc.

Thalheimer has replaced the smile sheet beauty pageant with an approach that delivers concretely actionable design insights, reinforces learning, and educates learners and their sponsors about what really matters in learning. He's turned the smile sheet into a tool capable of delivering substantial performance impact for both individuals and businesses.

Adam Neaman, PhD
former Manager of Technology-Enabled
Learning Design, Mckinsey & Co.

Armed with a lot of heart and incredible insights, this book oozes with mind blowing, radical, myth-busting, research-proven takeaways from the master of learning research, Will Thalheimer. This is a must read, and a must apply, for anyone involved in education, learning, and evaluation; from conferences to workshops to online education.

Jeff Hurt, EVP, Education & Engagement,
Velvet Chainsaw Consulting

**PERFORMANCE-
FOCUSED
SMILE SHEETS**

**A RADICAL RETHINKING
OF A DANGEROUS ART FORM**



WILL THALHEIMER, PHD

WORK-LEARNING PRESS

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DEDICATION

For many, many years, I've had the following dedication written down, waiting for my first book to be published. I want to use this chance to honor those who have given me the most.

- To my mom and dad, Kay and Bill, who somehow—in a way that I regret I'll never fully understand—prepared the soil for my growth and learning.
- To my wife, Dorothy, who has allowed me my mission—through the struggle, despair, and joys of the journey.
- To my daughter, Alena, whose twelve-year-old soul and luminous eyes remind me daily that learning is at the heart of our humanity.

CONTENTS

<i>Acknowledgments</i>	<i>xv</i>
<i>Preface</i>	<i>xvii</i>
<i>Introduction</i>	<i>xix</i>
<i>Why This Book Is Worth Your Time</i>	<i>xxiii</i>
<i>Who Will Find Value in This Book</i>	<i>xxv</i>
CHAPTER 1:	
What Are Smile Sheets For?.....	1
CHAPTER 2:	
Your Smile Sheets Suck!.....	11
CHAPTER 3:	
Smile Sheets Should Predict Training Effectiveness.....	29
CHAPTER 4:	
Smile Sheets Should Produce Actionable Results.....	45
CHAPTER 5:	
Smile-Sheet Question Quiz.....	57

CHAPTER 6:	
Candidate Questions for a Performance-Focused Smile Sheet.....	67
CHAPTER 7:	
Delayed Smile Sheets.....	117
CHAPTER 8:	
How to Present Your Smile-Sheet Results.....	129
CHAPTER 9:	
Making This Happen.....	139
<i>Epilogue: Audacity for the Future of the Workplace</i>	
<i>Learning Field</i>	147
<i>References</i>	149
<i>About the Author</i>	153

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Specific thanks go to Doug Holt and Russ Spaulding for enabling me to share some of the underlying concepts of the Performance-Focused Smile Sheet before they were fully formed. Thanks to all the folks who gave me advice on book publishing, including Mark Klein, Chad Udell, Clark Quinn, Julie Dirksen, Michael Allen, Ruth Clark, Allison Rossett, Roy Pollock, and various members of the Maine Writers and Publishers Alliance.

Thanks to Kate Ankofski and Katherine Pickett for their incredibly helpful editing. I had no idea that so many improvements could be made.

Special thanks go to Jack Phillips, Rob Brinkerhoff, Bill Coscarelli, Clark Quinn, Adam Neaman, and Julie Dirksen, for giving me in-depth feedback on the initial draft of this book—helping me improve it immeasurably.

PREFACE

I'VE BEEN DOING LEARNING SINCE I reached adulthood. I taught emotionally disturbed kids how to act as Boy Scouts. I taught a young woman whose body and mind had been devastated by meningitis—who had almost no control over her arms—how to reach to grab a spoon. It took six weeks. I got into an MBA program so that I could find a job, but found that instructional-design courses were much more rewarding. I got work as an instructional designer and designed an “MBA in a box.” I built simulations to teach leadership and management skills. I parlayed this into an opportunity to build two simulations to teach at-risk high-school students in Brooklyn on how to run a business. I taught teachers-in-training about educational psychology. They taught me that I knew nothing about schools. I taught leadership courses and change-management courses to managers in Fortune 500 companies. I even taught business strategy a few times with learners polite enough not to laugh at my lack of depth. For seventeen years, I've been teaching instructional designers, trainers, and elearning developers about the research on learning.

I was lucky. When I started Work-Learning Research in 1998 I had very few responsibilities. No family to help support. No mortgage to pay. I could earn enough money to support myself by selling my skills as a leadership trainer. Most of my time was spent wonderfully lost in the research on learning, memory, and instruction. My aim was to uncover a short list of fundamental learning factors in an otherwise chaotic sea of experimental results. The task was huge—too big for me to succeed in the short term. But swimming in the vast depths of the research, I began to understand human learning at a deeper level than I could have previously contemplated. I also learned how daunting the task, how impossible! Over the years, I've kept my research going a good portion of the time. It's an important task—bridging the gap between research

and practice—but unfortunately, it’s one that the world doesn’t easily support in the learning field. Still, I’m grateful that I’ve had the time.

I took this path because I believed strongly—and still believe—that learning is a noble cause. It is learning that has enabled human civilization and growth. It is learning that enables individuals to excel and thrive. It is learning that holds the promise of the future.

If learning is so important and our task is such a noble one, don’t we, as learning professionals, have an almost sacred responsibility to do our jobs well?

The way I see it, there are two main lynchpins to our performance. First, scientific research must guide our starting assumptions. Second, we must use good learning measurement to get valid feedback so that we can refine our understandings, improve our learning designs, and live up to our promise—so that we can maximize learning’s benefits.

This book focuses on the second imperative. It examines the popular yet downtrodden smile sheet and attempts to elevate it to full effectiveness. While smile sheets should never be the only way we get feedback on learning, by improving them, we can get significantly better information about how we’re doing. With better information, we can create virtuous cycles of continuous improvement. We can build more effective learning interventions and meet our obligations as learning professionals.

INTRODUCTION

FOR SEVENTEEN YEARS I'VE BEEN exhaustively reviewing research on how people learn, reading an average of over two hundred articles every year from scientific refereed journals. Doing the research has enabled me to build a consulting practice where I can provide workplace learning professionals with research-inspired insights. It has also compelled me—and I really can't help myself—to think about the state of the learning profession. This is not always a happy endeavor.

One thing I noticed a few years ago was that we as workplace-learning professionals often work in darkness. We get most of our feedback from smile sheets—also known as happy sheets, postcourse evaluations, student-response forms, training-reaction surveys, and so on. We also get feedback from knowledge tests. Unfortunately, both smile sheets and knowledge tests are often flawed in their execution, providing dangerously misleading information. Yet, without valid feedback, it is impossible for us to know how successful we've been in our learning designs. I'm writing this book to help you get better feedback and to help your organization produce more effective learning initiatives. I'm focusing here on smile sheets because they are so central to our work in today's workplace-learning industry.

We, as workplace learning-and-performance professionals, often see smile sheets as a small thing—when they are in fact a huge, dark, and demonic colossus. More than any other tool in the training-and-development industry, smile sheets control what we do. They are a self-inflicted form of mind control, warping our thoughts from learning's essential realities. Smile sheets—as now designed—do not just tell us nothing. They tell us worse than nothing. They focus our worries toward the wrong things. They make us think our learning interventions are more effective than they are. More than any other practice

in our field, they have done the most damage.

In brief, here are the problems with traditional smile sheets:

1. They are not correlated with learning results.
2. They don't tell us whether our learning interventions are good or bad.
3. They misinform us about what improvements should be made.
4. They don't enable meaningful feedback loops.
5. They don't support smile-sheet decision making.
6. They don't help stakeholders understand smile-sheet results.
7. They provide misleading information.
8. They hurt our organizations by not enabling cycles of continuous improvement.
9. They create a culture of dishonest deliberation.

This book aims to stop the bleeding.

Some of you may not be familiar with the term “smile sheet.” Others may wonder why I am appropriating a word that has a derogatory meaning. Those of you who are mindful of future trends may be wondering why I'm using a term that connotes paper-and-pencil responding when more and more smile sheets are being delivered electronically.

Smile sheets are also known as happy sheets, student-response forms, trainee reaction surveys, and so forth. I've decided to use the term “smile sheet” because it is the most commonly used term, it has a long history of use, and it conjures elemental conceptions that need a massive dose of reform.

My hope for this book is simple: to help you get significantly better insight into the factors that drive your learning results—so that you can improve your current learning practices. By reading this book, you will learn how to create a Performance-Focused Smile Sheet. You will look at your current smile sheets in a whole new light—as if seeing them for the first time. With newfound wisdom,

Introduction

you'll know how to radically improve your smile sheets, providing you and your stakeholders with a unique and enlightening vision of your learning outcomes! The smile sheets you will build will be inspired by the learning research, will help your learners produce more useful information, and will focus not just on the learning event but also on the situations and factors that enable the learning to culminate in successful real-world accomplishments.

WHY THIS BOOK IS WORTH YOUR TIME

1. The methods presented in this book will help you to create smile sheets that will provide you and your stakeholders with truly valuable data and information—of the kind that will enable you to create virtuous cycles of continuous improvement, and thus, significantly better learning outcomes for your learners and your organization.
2. This book is research-based. It draws its recommendations from the world’s best learning research, from the preeminent refereed scientific journals on learning, memory, and instruction.
3. This book is comprehensive. It offers a complete system for developing smile sheets.
4. This book is born of real-world experience. It acknowledges that research alone is not worth anything without practical wisdom.
5. This book is designed to help you learn. It will support your learning as much as the book format allows.
6. This book is a “call to arms.” It takes an honest look at the training-and-development field and our poor measurement practices. It celebrates sound ideas. It fumes angrily at bad practices.
7. This book follows the aphorism often attributed to Albert Einstein, “Everything should be made as simple as possible, but no simpler.”¹ It simplifies complex realities into workable recommendations.

1 Ironically, these words were probably not actually stated by Einstein, but are rather a simplification of the sentence, “It can scarcely be denied that the supreme goal of all theory is to make the irreducible basic elements as simple and as few as possible without having to surrender the adequate representation of a single datum of experience,” as described on http://en.wikiquote.org/wiki/Albert_Einstein and in more detail at <http://quoteinvestigator.com/2011/05/13/einstein-simple/#more-2363>.

WHO WILL FIND VALUE IN THIS BOOK

THIS BOOK WILL BENEFIT workplace-learning professionals who want to improve the design and delivery of their learning interventions.

Learning measurement professionals—practitioners responsible for smile sheets, assessments of learning and performance, and learning-based organizational results.

Creators of learning interventions—instructional designers, trainers, e-learning developers, teachers, professors, and other educators.

Managers of learning—chief learning officers, learning executives, training managers, conference-education professionals, and instructional-development managers.

Graduate students and faculty—in learning measurement, assessment, instructional design, instructional technology, e-learning, performance improvement, and adult learning.

Performance-Based Smile Sheets is ideal for experienced practitioners who want to (1) energize their current practices with research-based recommendations, (2) challenge themselves with unique and provocative perspectives, and (3) prepare for the future of the learning-design field.

CHAPTER 1

WHAT ARE SMILE SHEETS FOR?

IMAGINE YOURSELF AS THE chief learning officer of a global corporation. You've been with the company seven years, working your way up, reveling in the success of the workplace learning-and-performance function. Suddenly, your CEO retires and a new CEO is hired. In her late thirties, Julie Sendirk is known as an innovator and a straight shooter. After a month or so and several meetings, Sendirk calls you into her office and asks you to help her understand the annual report your department created.

Julie: "Hey, welcome! Here's what I'm interested in, and I need your help. In general, I want to understand how you learning folks operate. Today, I want to drill down on the smile-sheet results from the past year. If I read this report right, it says that overall, our training courses have an average rating of about 4.1? Is that accurate?"

You: "Yes, and 82% of our courses are rated at 4.5 or better. We're very proud of our results. We've worked hard to improve our ratings over the last three years."

Julie: "But what does a 4.1 actually mean?"

You: "It means that we're doing well, that the training is well received. It's a 4.1 on a 1-to-5 scale, so we can't get much higher."

- Julie: “But what does the 4.1 actually mean?”
- You: [controlling the urge to talk louder] “Well, at the end of every training class, we give learners a set of questions about their perceptions of the training.”
- Julie: “And each question has a 1–5 scale?”
- You: “No, actually. Each question is really a statement, and the learners select one of five answer choices, from ‘strongly disagree,’ which gets a 1, to ‘strongly agree,’ which gets a 5.”
- Julie: “So a 4.1 means that most people ‘agree,’ and if they don’t select ‘agree,’ they likely selected ‘strongly agree,’ and if not, then they’ve probably chosen ‘neither agree nor disagree?’”
- You: “Yes, that’s exactly right. Pretty simple, really.”
- Julie: “Hmm. But what does a 4.1 mean? It certainly can’t mean that our employees tend to be agreeable?”
- You: “Well, no. . . .”
- Julie: [cutting you off] “So the 4.1 is an average of the dozen or so questions you ask?”
- You: “Well, no, in the annual report we just share the results of one question, our main question.”
- Julie: [now looking skeptical] “So you collect more than 10 times the data than that which you share with senior management?”
- You: [starting to sweat] “Well, in our experience—and let me apologize for saying this—most senior managers just want the overall scores.”
- Julie: “So what is this overarching question you ask, your main question

as you call it—the one that answers the question I asked earlier, ‘What does 4.1 mean?’”

You: “We ask the learners to rate the overall value of the course. The question statement reads, ‘This training provided valuable job-relevant information that supports on-the-job performance.’”

Julie: “Hmm. And what evidence do you have that the learners are good at evaluating the value of training? What evidence do you have that your main question is associated with actual on-the-job performance?”

You: “It’s a training-industry standard.”

Julie: “And this standard is based on trusted scientific research?”

You: “Well, I haven’t actually seen the research, but I’m sure the learning-measurement experts rely on the best research.”

Julie: “Have we done any studies to show that this one question is valid with our learners and the content areas in our organization? So for example, if we get high scores on this question, do we know whether our employees are more likely to be successful on the job than if they’ve been in a course that gets a low rating?”

You: “We’ve seen that this question is correlated to our other smile-sheet questions, so we’re pretty confident.”

Julie: “But that’s not what I’m asking. Of course the questions are correlated, probably because people just circle the same numbers down the smile sheet. What I want to know is whether our smile-sheet results—the one’s you show management every year—are related to on-the-job performance. Do we know that?”

You: “They should be.” [Here you go into a long discussion of the Kirkpatrick four-level model of training evaluation.]

Julie: “Has this model been tested? Does it show that smile sheets are correlated with learning results? And even if it has been tested generally, how do we know our smile sheets are correlated with our learning results?”

You: “The Kirkpatrick model has been around since the 1960s.”

Julie: [acting highly skeptical] “All right! Thank you! Here’s what I want. I want a way to measure how effective our training courses are in helping our employees understand the concepts and skills they’re being taught. I also want to know whether our employees are able to remember the concepts and skills and whether they’re successful in applying them to their jobs.”

You: “We can do that, but it costs more money to measure learning and application. We occasionally do some of this kind of measurement, but most previous senior leaders didn’t want to pay for it.”

Julie: “Make a business case, and I’ll definitely pay for it. I don’t know how you guys can operate in the dark, without getting any feedback on how you’re really doing. But what about these smile sheets? Can’t you improve them to at least give you some idea of how effective the training has been?”

Okay, this is Will again. Let me apologize for putting you into the role of an almost-clueless CLO. Just like I tell my daughter, you’ll thank me for it later. SMILE. The truth is that Julie—our savvy new CEO—asked some damn good questions—questions we in the training-and-development field don’t always ask ourselves. I’m starting the book with this example to show how our traditional approach to smile sheets may have a few chinks in its armor—and also to get your blood flowing a bit. We’ll go into more depth about the issues this case presents, but first, let me cover some basics to make sure we’re on the same page.

What Is a Smile Sheet?

A smile sheet is a set of questions provided to learners after training—or after a portion of training—asking for learners’ perceptions of the value of the training. Smile sheets are also known as happy sheets, student-response forms, trainee reaction surveys, and so forth. In fact, the terms “smile sheet” and “happy sheet” are often considered to have a derogatory connotation. The feeling among many practitioners is that smile sheets have minimal value or provide misleading results. Despite these concerns, smile sheets are the most popular way to get evaluative feedback about the success of workplace training—and the same is true in higher education as well.

Smile sheets are often placed within a framework of other learning-measurement methods. By far the most popular of these frameworks is the Kirkpatrick four-level model of learning evaluation. The Kirkpatrick Model’s four levels are:

1. Learner Reaction
2. Learning Results
3. On-the-job Behavioral Results
4. Organizational Results

Learners’ reactions are almost always measured through smile sheets. Learning can be measured in many ways, including tests, skill demonstrations, scenario-based questions, and more. On-the-job behavioral results are often measured with self-report data, but can be measured through observations of actual performance, ratings from others, and objective performance measures such as time-of-task completion. Organizational results are usually measured with organizational data that is already collected by the organization, such as sales revenues, costs, and customer satisfaction. While the Kirkpatrick Model is widely used, it is also widely criticized for its shortcomings. We will touch on these shortcomings in Chapter 2. For now, it’s critical to understand that for many people, the Kirkpatrick Model signifies that smile sheets are related to the other four levels.

Smile sheets can be utilized for many reasons.² Here's a short list, which I've modified slightly from learning-measurement expert Rob Brinkerhoff:

1. Red-flagging training programs that are not sufficiently effective.
2. Gathering ideas for ongoing updates and revision of a learning program.
3. Judging strengths and weaknesses of a pilot program to enable revision.
4. Providing instructors with feedback to aid their development.
5. Helping learners reflect on and reinforce what they learned.
6. Helping learners determine what (if anything) they plan to do with their learning.
7. Capturing learner satisfaction data to understand—and make decisions that relate to—the reputation of the training and/or the instructors.
8. Upholding the spirit of common courtesy by giving learners a chance for feedback.
9. Enabling learner frustrations to be vented—to limit damage from negative back-channel communications.

Most traditional smile sheets are pretty good at numbers 7, 8, and 9 above—getting learner satisfaction data, providing a feedback mechanism out of common courtesy, and enabling learners to vent their frustrations. I'm on my high horse in this book to help us all develop better feedback loops so that we can create virtuous cycles of continuous improvement. Within the list above, this book is aimed at helping us do much better on numbers 1 through 4, which I'll repeat here to emphasize them:

2 Special thanks to Rob Brinkerhoff for reminding me of this truth and for providing me with a list of reasons that I am sharing with you now in a somewhat modified form.

1. Red-flagging training programs that are not sufficiently effective.
2. Gathering ideas for ongoing updates and revision of a learning program.
3. Judging strengths and weaknesses of a pilot program to enable revision.
4. Providing instructors with feedback to aid their development.

The bottom line for me is that we need to get good feedback so that we can improve what we're doing.

That's my belief, but you and your organization are going to have to determine for yourselves what you want to get out of your smile sheets. Indeed, one key to successful evaluation is to first figure out why you're doing what you're doing. I recommend that you get your team together to reflect on the above nine-item list and see what you want to accomplish with your smile sheets. Only then should you start your smile-sheet design work.

Learning Measurement Is Pure Sex!

I received a call recently asking me to speak at an industry meeting. The caller said she loved my work and anything I wanted to talk about would be great. Because of all the love and goodwill I was hearing, I brimmed with warm fuzzies as I recited half a dozen topics I could speak on. When we got to the topic of "performance-focused smile sheets" I practically oozed with elation. I talked about their importance and how recent audiences—even of learning executives—trembled in delight when they learned that traditional smile sheets could actually be dangerous. The person I was speaking with got fired up too, but said this: "Learning measurement just isn't sexy enough to draw people to our meeting, so I think we should go with another topic."

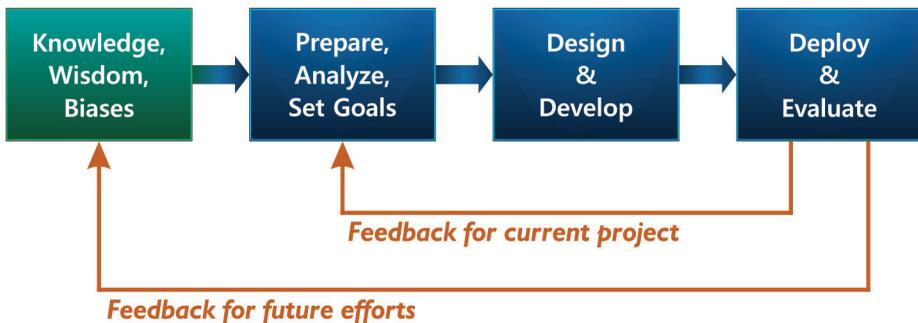
What the heck? Learning measurement isn't sexy enough? Let me start this book by saying that learning measurement is pure sex—with titillating foreplay, naked truth, and the dangerous rapture of the potential for new life. Seriously! Learning measurement is one of the most important topics in training

and development—especially because most learning measurement is gravely incompetent.

I’ve been on the warpath on learning measurement for almost a decade. I’ve written articles on learning-measurement bias. I’ve done numerous keynote addresses, featured sessions, invited masters presentations, and workshops on learning measurement. I almost always bring up the need for better learning measurement with my consulting clients. Why am I—a research-guzzling learning consultant—so crazy about learning measurement? Because learning measurement gives us feedback! It gives us feedback so that we can improve what we’re doing. It is one of the most important things that we do! Without adequate feedback loops, we simply can’t know whether we’re doing any good at all. We can’t know what to improve—or whether to improve. Without getting good feedback we frankly aren’t worthy of the title “professionals.”

In the diagram that follows, you’ll notice the tried-and-true instructional-design process. In it, feedback loops show how the instructional-design process is supposed to work. We are supposed to get routine feedback so we

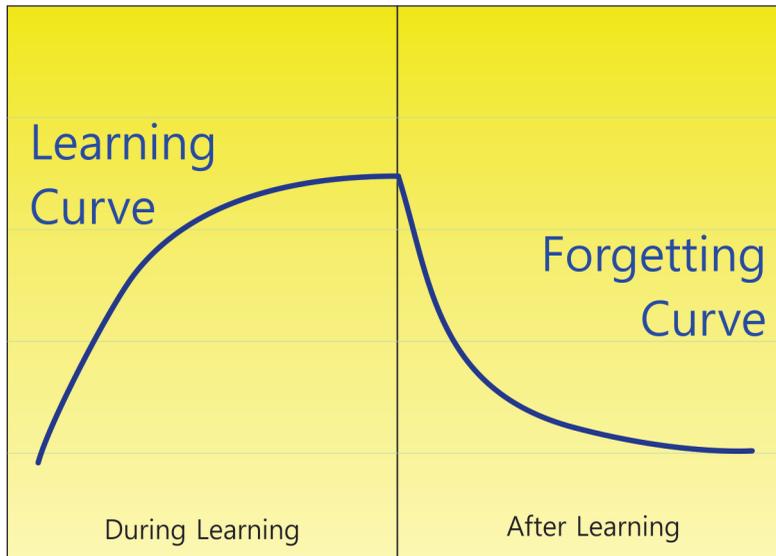
The Instructional-Design Process



can improve our current efforts and also improve our knowledge and wisdom, while reducing our biases. Rarely does it work as diagrammed.

We tend to measure learning at the end of learning events, which seems sensible, but it doesn’t take into account eons of research on human learning and forgetting. When we measure at the end of learning, we are only measuring our learners’ *understanding* at that point in time; we are *not* measuring their ability to *remember* after the learning event. Look at the next diagram. You

can see that if we measure at the end of the learning event, the learners are at their highest level of memory retrieval. Of course! Everything at the end of training is top-of-mind. Things are easy to recall. When we measure at the end of learning, we are getting biased results. We are getting results that make us—and our learning interventions—look a whole lot better than the truth.



Similarly, when we measure in the learning context, we are also biasing our results. People aren't like computers. We don't just retrieve perfect packets of information from memory; we access a full range of associated memories. When a person is in the same context that they learned in, the stimuli in that context will remind them of what they learned. If the learning context is not the work context, then measuring learning in the learning context will produce more and better memory retrieval than the work context will—again producing biased learning-measurement results.

A third learning-measurement bias entails how we are measuring. As Sharon Shrock and Bill Coscarelli have pointed out in their brilliant book on criterion-referenced test development, the best measure of performance competence is actual performance.³ If we're teaching someone to drive a forklift, the best way

3 Shrock & Coscarelli (2007).

to measure their competence will be to have them drive a forklift—preferably in the same conditions they’ll face on the job. If we can’t measure real-world performance, we can simulate or have the learners make authentic scenario-based decisions as reasonable proxies for performance. What we don’t want to do is to just test learners on their knowledge of simple facts. Unfortunately, because it is a lot easier to measure simple knowledge than it is to measure deeper performance-focused know-how, most learning measurement is biased toward the retrieval of facts—even though such metrics are extremely poor predictors of real-world performance.

Just like these more direct assessments of learning, smile sheets should likewise be relevant to actual performance and as unbiased as possible. But, alas, most smile sheets suffer from the same issues as the three biases mentioned above. They are deployed only at the end of learning, only in the learning context, and only with poorly designed, irrelevant questions.

End of Chapter 1

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Thank you!!!!!!!

Will Thalheimer
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