

Impact Evaluation



Improving performance isn't easy, whether it's the habits and practices of your sales teams, your leaders, or your individual contributors. It's a serious investment of resources—not just money, but time, effort, and attention that could be spent on other priorities. As our clients take on major efforts to improve performance, it makes sense to build in methods to monitor the progress and measure the results. When the inevitable question, “Was it worth it?” comes, our clients already *know* that it is—and they can *prove* it!

Impact Evaluation will augment any effort to improve performance. It's been used in financial services, pharmaceuticals, manufacturing, biotechnology, telecommunications, shipping, and many other industries. An *Impact Evaluation* shows the behaviors that changed, the performance that improved, and the results achieved, whether in sales, leadership, or individual effectiveness.

Outcomes

Impact Evaluation is a collaborative process that monitors effectiveness and demonstrates results. Showing results earns more support and gains wider participation in the effort to improve performance. It adds value and supports success by showing where development investment should focus for the best return on effort.

Approach

Impact Evaluation is a flexible and adaptable process. *Impact Evaluation* involves short surveys of participants and their managers (at least) and may also involve win/loss reviews, manager interviews, business metrics, and “best practice” sessions. Whether simpler or more customized, the outcome of the process is a clear, credible view of what changes persist and what results are attributed.

At its core, the process is always the same:

1. **Clarify** the outcomes the client needs.
2. **Identify** credible change indicators and the approach to collect them.
3. **Document** the approach, variables, scope, and project plan.
4. **Evaluate** and monitor with the chosen approach.
5. **Report** results, recommendations, and next steps.

Continuing Measurement

Measurements such as *Impact Evaluation* focus organizational attention on the good outcomes the organization needs. Organizations should exercise the option of a repeat measurement several months later to maintain that focus and continue the process.

The (optional) repeat measurement offers several predictable advantages:

- Organizational attention is kept on the desired good outcomes.
- Sustainment of the improved performance remains a priority.
- The improved performance has a better opportunity to become habit.

Outcomes by Step—Impact Evaluation

Step	Outcome
Clarify Discuss and discover with key stakeholders exactly what will demonstrate success in the performance improvement effort	Clarity and agreement on the changed behaviors and results that signal success
Identify Discover and agree on change indicators that are already available or that need to be created; agree on the best evaluation approach	Simple elegance in a measurement approach
Document Write up the approach, what other variables might affect the change indicators, the pre-program state of the change indicators, who will be involved, and how they will be involved—the complete plan	A simple plan and baseline
Evaluate Execute the planned approach, monitoring and informing the client of participation, early results, and emerging trends	Important data
Report Report results, typically in a briefing to the stakeholders to describe the changed behavior, the changed results, and recommendations to maintain/optimize both	Information and insight to drive decisions to optimize the impact

Continued

Continuing Improvement

The information and insight that *Impact Evaluation* provides is intended to both document successful change and provide a path toward continuing improvement.

Recommendations typically include a candid assessment of where implementation has missed opportunities, how follow-through and accountability might be improved, what remediation is indicated when the changed behaviors and results are not yet meeting expectations, and what next steps for the client organization will keep the improved performance at the targeted level or above.

This offering, like all others from Wilson Learning, can be customized to reflect your environment and business priorities and can be integrated with your processes.