COMPANY X: EVALUATION PLAN

This evaluation plan for Company X – an edtech scale-up company.

Written by: Ritika V. Chari

## **Introduction**

This report is written to address the senior leadership of the Customer Experience (CX) department at Company X. This report will provide a summary of findings from the performance assessment and change management plan as well as share an evaluation plan using the Kirkpatrick model.

## **Vision of Change**

**Summary of Vision of Change**

I envision a workplace where every employee is empowered to perform at their highest potential through access to innovative learning solutions. By transforming learning into a strategic advantage, I want Company X to be able to reduce student application errors, trainers within the CX department to spend less time on providing ILT training and more time on training that will be effective, elevate customer experiences, and unlock the full capability of their top talent by making smart use of their time to drive lasting success.

**Impact of Interventions**

The interventions I suggested in the Performance Assessment were:

1. **Conduct Root Cause Analysis and Streamline Content.** It is possible that training may be overloaded, outdated, or misaligned with what employees need to know to do the job.
2. **Shift to a blended learning approach with scalable digital resources**. Relying solely on Instructor-Led Training (ILT) drains time between both the senior employees/trainers and the trainees as it’s not a scalable approach to support independent performance once the training meetings end. As a result, this reduces dependency on senior employees/trainers and improves knowledge retention with on-demand reinforcement.
3. **Integrate Post-Training Performance Support & Feedback Loops.** Without feedback or coaching, learners can’t calibrate their performance, and mistakes will continue to persist. Feedback channels convert training into continuous learning opportunities rather than act as one-off events.

Each of these interventions plays an essential role in translating the vision of change into tangible results. Conducting Root Cause Analysis and streamlining content ensures training addresses the *real* issues behind poor performance and customer dissatisfaction whether it’s outdated material, knowledge gaps, or misaligned expectations. By eliminating redundancies and tailoring learning to job-specific needs, employees are better equipped to deliver their best, and the organization begins using its resources more wisely. This also eliminates the need for the organization to hire additional resources through third party contracts, which I mentioned in the Performance Assessment.

Shifting to a blended learning approach with scalable digital resources makes learning more accessible, efficient, and engaging. It empowers employees to learn at their own pace. When coupled with post-training support and feedback loops, employees gain continuous reinforcement and performance guidance, minimizing recurring mistakes and elevating the customer experience.

These interventions work together to unlock top talent, reduce time and effort spent retraining, and foster a culture of growth and accountability aligning seamlessly with the overall vision of empowering people.

## **Evaluation Plan**

Review table 1.1 below to gain an understanding of the evaluation plan mapped across all of the proposed interventions.

Table 1.1

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Intervention | Data collected | Method of data collection | How is data collected | Source – who or what | When | Potential impact on intervention(s), change management plan or evaluation plan |
| Root cause analysis & streamline content | Post-training survey (relevance, clarity)  Pre/post assessments  Focus group feedback | Online surveys  Course knowledge checks/quizzes  Facilitated focus groups | LMS survey  LMS course enrollments, course completions  In-person or virtual sessions – attendance | Training participants  Focus group members | Survey: 1–3 days post-training  Conduct assessments Before & after training  Focus groups: After initial rollout | Identifies outdated or misaligned content  Refines curriculum and learning objectives  Informs future content audits |
| Develop blended learning with scalable digital resources | Survey on format preference  Module completion rates  Performance metrics  Manager observations | Online survey  LMS analytics  HR system reports  Observation checklists | LMS tracking  HR database queries  Manager-submitted forms | Training participants  HR Manager/HRBP | Survey: Post-training  Analytics: Ongoing  Observation:1–3 months post-training | Validates effectiveness of digital tools  Reduces reliance on ILT  Informs tech investment and scalability strategy |
| Post-training performance support & feedback loops | Peer/manager feedback  Retention and engagement metrics | Online feedback forms  HR reports | Email forms  System usage logs | Managers Peers  HR systems | Feedback: 1- & 3-months post-training  Metrics: 3–6 months post-training | Enhances coaching and reinforcement  Strengthens continuous learning culture  Refines feedback channels and support tools |
| Common across all interventions (level 4 vision of change) | ROI/ROE analysis  Business KPIs  Interviews | Data synthesis  Interviews  Focus groups | Leader interviews  Facilitated discussions | HR leaders Executives  Training participants | 3–6 months post-training  Quarterly review to begin and then annual review | Validates overall change initiative  Supports scaling or redesign  Refines evaluation and change management strategy |

**How Evaluation Data May Impact Future Changes**

Evaluation data collected across Kirkpatrick’s levels 1 to 4 will be used to:

* **Refine the intervention(s)**: If Level 1 (Reaction) data shows low engagement or satisfaction, I may revise delivery methods, content, or facilitators.
* **Adjust the change management plan**: If Level 3 (Behavior) data continue to reveal poor adoption despite positive feedback, I might need to request additional leadership support, enhance communication strategies, or distribute resources.
* **Improve the evaluation plan**: If data collection at any level is inconsistent or unclear, I’ll revise tools, timing, or metrics to ensure more reliable insights.

**2. Why Multiple Types of Data Are Collected at Each Level**

Collecting diverse data types at each level ensures:

* Combining qualitative (e.g., interviews, open-ended surveys) and quantitative (e.g., Likert scales, performance metrics) data strengthens validity.
* Different stakeholders value different data. For instance, executives may prioritize ROI (Level 4), while trainers focus on learning outcomes (Level 2).

**3. Value of Looking Across Levels**

Review table 1.2 below to gain an understanding of the Kirkpatrick levels across differing scenarios and key insights.

Table 1.2

|  |  |
| --- | --- |
| Scenario | Insight |
| **High Level 1, Low Level 3** | Participants liked the intervention but aren’t applying it suggests barriers like lack of support, unclear expectations, or poor follow-up. |
| **Strong Level 3, Weak Level 4** | Behavior change is happening, but it’s not translating into business impact may indicate external factors (e.g., market conditions, misaligned KPIs). |
| **Low Level 2, High Level 1** | Participants enjoyed the experience but didn’t learn much training may be engaging but ineffective. |
| **High Level 2, Low Level 3** | Learning occurred, but behavior didn’t change points to organizational or cultural resistance. |

**Potential Obstacles to Data Collection**

Potential obstacles to data collection include limited participant engagement, high costs in time and labor for follow-up surveys or interviews, and inconsistent data reporting from managers. To address these, I will need to streamline tools for ease of use, automate data tracking where possible, and prioritize high-impact metrics to justify resource allocation. Investing in quality data ensures actionable insights that drive strategic improvements.

**Reflection on Progress towards Evaluation**

Throughout this process, I’ve come to see evaluation not as a final step, but as an integral part of every phase in the Human Performance Technology (HPT) cycle. If I were to begin a new HPT initiative, I’d embed evaluation planning from the outset to ensure alignment between goals, interventions, and measurable outcomes. I’ve also realized that change management and evaluation planning are deeply interconnected; both require reinforcing behaviors and tracking progress.