

Learning Measurement & ROI Framework

Enterprise L&D — Evaluating Impact Across Four Levels

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PURPOSE & PHILOSOPHY

This framework establishes a consistent, scalable approach to measuring the effectiveness and business impact of learning initiatives across the enterprise. It is grounded in the Kirkpatrick Four-Level Model and adapted to reflect the operational realities of regulated, high-performance environments including financial services, mortgage servicing, and call center operations.

Measurement is not an afterthought. It is designed into every program from the beginning — before a single slide is built or a facilitator is assigned. The question 'How will we know it worked?' must be answered before the question 'What will we teach?'

Core Principles

- Measurement begins at program design, not at program close
- Every learning initiative must have at least one business metric it is intended to influence
- Data tells us what happened; insight tells us what to do next — both are required
- Not every program requires a full Level 4 ROI calculation — use the right level for the stakes involved
- L&D does not own all the data — partner with Operations, HR, and Compliance to access it

THE FOUR-LEVEL MEASUREMENT MODEL

L1

Reaction — Did they find it valuable?

Key Question: Did participants find the learning experience engaging, relevant, and well-facilitated?

What We Measure	Participant satisfaction with content, facilitation, pacing, and relevance to their role
When to Measure	Immediately at session close or within 24 hours via LMS survey
Tools / Methods	Post-session feedback survey (5-point scale + open-ended); facilitator self-assessment; real-time pulse check (thumbs up/down, polls)
Example Metric	<i>Average satisfaction score of 4.3/5.0 across all Coaching Conversations modules; 91% of participants rated content 'relevant to my current role'</i>

L2

Learning — Did they gain knowledge or skill?

Key Question: Did participants acquire the intended knowledge, skills, or confidence as a result of the training?

What We Measure	Knowledge retention, skill demonstration, confidence shifts, and ability to apply content
When to Measure	During and immediately after learning (pre/post knowledge check, skill observation, confidence survey)
Tools / Methods	Pre/post assessment (LMS-administered, 80% pass threshold); facilitator observation checklist during activities; skill demonstration rubric; confidence self-rating (before and after)
Example Metric	<i>Average post-assessment score improved from 61% (pre) to 87% (post) across Coaching Conversations cohort; 84% of participants demonstrated correct use of C.O.A.C.H. framework during observed role play</i>

L3**Behavior — Did they apply it on the job?**

Key Question: Are participants applying what they learned in their day-to-day work?

What We Measure	On-the-job behavior change: frequency, consistency, and quality of newly learned skills in real work context
When to Measure	30, 60, and 90 days post-training; requires partnership with direct managers and HR
Tools / Methods	Manager observation checklist (30-day); direct report pulse survey (60-day); skip-level interview or focus group (90-day); QA call monitoring data; 1:1 coaching conversation frequency tracking
Example Metric	<i>After Coaching Conversations program: 78% of participants reported conducting at least 2 structured coaching conversations per week at the 60-day mark (up from 31% at baseline)</i>

L4**Results — Did it move the business?**

Key Question: Did the learning initiative contribute to measurable improvement in business outcomes?

What We Measure	Business KPIs and operational metrics that the program was designed to influence
When to Measure	90+ days post-training; requires longitudinal tracking and partnership with business analytics
Tools / Methods	Trend analysis of target business metrics (pre vs. post cohort); comparison of trained vs. untrained populations; correlation analysis; cost-benefit calculation
Example Metric	<i>Teams whose managers completed Coaching Conversations showed 14% improvement in QA scores and 9% reduction in voluntary attrition over a 6-month period vs. comparable teams whose managers had not yet completed the program</i>

ROI CALCULATION METHODOLOGY

Use this approach when a senior stakeholder requires a financial return-on-investment calculation. ROI analysis is most appropriate for high-cost, high-stakes programs or enterprise-wide initiatives.

Step 1: Isolate the Effect of Training

- Use a control group comparison (trained vs. untrained) wherever operationally feasible
- If a control group is not possible, use trend analysis (pre/post) with documented assumptions
- Apply a credibility adjustment factor (e.g., 'We attribute 40% of the metric change to training, 60% to other factors') — document this assumption transparently

Step 2: Convert Data to Monetary Value

Metric Type	Conversion Approach	Example
Productivity improvement	Average hourly rate × time saved per rep × headcount	2 min/call × \$18/hr × 120 reps = \$14,400/month
Error / rework reduction	Average cost to correct error × error reduction rate	QA failure costs \$85 to remedy × 200 fewer failures = \$17,000
Attrition reduction	Average cost to replace employee × turnover delta	Replacement cost \$4,200 × 8 fewer exits = \$33,600
Compliance risk avoidance	Potential fine or remediation cost × probability reduction	Based on regulatory history and compliance audit findings

Step 3: Calculate Total Program Cost

- Design and development hours (L&D staff + SME time × loaded hourly rate)
- Facilitation cost (facilitator time + travel if applicable)
- Participant time cost (average hourly rate × seat time × headcount)
- Materials, technology, and LMS administration
- Opportunity cost (productivity loss during training time)

Step 4: Calculate ROI

Formula	Example
ROI (%) = [(Net Benefits – Program Cost) ÷ Program Cost] × 100	Net Benefits: \$65,000 Program Cost: \$22,000
Net Benefits = Total Monetary Value – Program Cost	ROI = [(\$65,000 – \$22,000) ÷ \$22,000] × 100 = 195%

MEASUREMENT PLANNING TEMPLATE

Complete this template at program design — before development begins. Share with the business partner and revisit at 30/60/90 days.

Program Name	
Business Problem / Goal	
Target Business Metric(s)	
Baseline (current state)	
Target (success looks like)	
L1 Measurement Plan	

L2 Measurement Plan	
L3 Measurement Plan	
L4 Measurement Plan	
Data Partners Needed	

This document is an original work sample created for portfolio purposes. It represents the author's methodology and professional approach to learning measurement and ROI.