

Job Aid for the 6Ds Outcomes Planning Wheel™

Use this job aid to help you achieve the greatest value from using the 6Ds Outcomes Planning Wheel in your discussions with business sponsors and stakeholders.

Preparation

Do your homework. Read relevant plans or other documents beforehand. Think about what you want to accomplish and how you want to structure the conversation. Business leaders are busy people; make efficient use of their time and stick to the time frame agreed on.

Opening

How you open the discussion with business leaders is important, especially as the approach you are going to take may be different from what they have been used to in the past. Use a consultative approach to open the conversation:

- Meet and greet**
- State the value:** "I am here today because we want the training we design for you to deliver real business impact and value. Training takes time and costs money. The better I understand your business needs and the outcomes you are looking for, the more value we can deliver for you."
- Propose an agenda:** "I'd like to ask you a few questions to clarify the business needs you want this training to meet, the kinds of changes we need to produce, and how we will know whether the program is achieving its goals. I understand we have scheduled ___ minutes for this meeting."
- Check for agreement:** "Is the agenda OK? Anything else you want to be sure we cover?"



Seek Understanding

Many business leaders are used to simply “ordering” some training to address a perceived need. They may not have thought deeply about the questions at the heart of the 6Ds Outcomes Planning Wheel. You may need to ask some probing or clarifying questions to achieve the level of understanding required to develop a truly effective program. Some comments and suggested follow-up questions are given below.

Throughout the conversation, practice active listening. Stop and check for understanding periodically: “Let me be sure that I have correctly understood. [Restate the needs, behaviors, etc., as you understand them.] Is that correct?”

Do not be afraid to admit you do not understand something. Ask: “Could you explain what you mean by. . . .” Another very useful phrase is: “Help me understand. . . .” This phrase can be used to genuinely seek understanding. It is also a graceful way to point out inconsistencies or confusion: “Help me understand how the training course you have requested is linked to your business needs.”

Using the Four Outcomes Planning Wheel Questions

1. What business need(s) will be met by this training?

Your goal is to clarify what the person requesting training is trying to accomplish in business terms.



Situation	Suggested Response
If the first answer is too general, for example, “increase sales,” probe for the intermediate steps/behaviors needed.	<i>I understand that the critical need is to increase sales. Can you help me understand the intermediate steps? What are the specific behaviors that contribute to increased sales that we need to address in this training?</i>
If the first answer is too narrow, for example, “We need to use the order entry system better,” probe for the ultimate, measurable outcome.	<i>I understand the immediate need is to improve the use of the order entry system. What is the ultimate goal? For example, fewer errors? Lower cost? Greater speed?</i>

2. What will participants do differently and better?

People have to do things differently to obtain a different result. Just “knowing” or “understanding” is not enough to improve performance. Your goal is to understand what trainees are supposed to *do* as a result of the training.



2. What will participants do differently & better?

Situation	Suggested Response
If the first answer describes what learners will know or understand, ask for desired changes in behavior.	<i>If the training is a success and we were to watch how people act afterward, what would we see them doing that is different and more effective?</i>
If the manager struggles to describe desired changes in behavior, ask how the better performers behave.	<i>Can you give me some examples of what the better performers do that lesser performers don't? Presumably, the training should help more people do what the better performers do. What would that look like?</i>
If the manager seems to hope that training alone is going to create the desired changes in behavior, help him or her understand that training is almost never the whole answer.	<i>In addition to the training, what needs to be in place to support and encourage these behaviors, such as incentives, consequences, managerial reinforcement, etc.? What might get in the way of people behaving in the desired fashion? How could we reduce or eliminate these impediments?</i>



3. What or who could confirm these changes?

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Your goal here is to identify ways to assess the effectiveness of the training and transfer climate.

Situation	Suggested Response
If the manager is not sure how to respond or is stuck, explain that, if the training works, it should produce an observable change in actions, perceptions, or business metrics.	<i>If we achieve the desired changes in the learners' behaviors, who will notice the changes? Do we have any systems or measures already in place that will change if we obtain the desired results? If so, what are they and how will they change if the training is successful?</i>
If the first answers describe large-scale or long-term effects that will be difficult to tie to the training itself (for example "retention will improve"), probe for immediate effects and leading indicators.	<i>I can certainly understand that that is the long-term goal, but it will take quite a while to show up, and it may be hard to figure out whether it was the training or something else that caused it. What would we see more immediately that would indicate that the training is working?</i>



4. What are all the specific criteria of success?

4. What are your specific criteria for success?

Your goal is to gain agreement in advance on how the sponsor defines success. That is, how much of a change is necessary for the sponsor to feel the investment was worthwhile? As with SMART business objectives, the measures of success should specify *how much by when*. This is the time to establish whether or not the sponsor requires financial analysis of the return on investment, and if so, what he or she considers acceptable evidence of ROI.

Situation	Suggested Response
If the answer is “Give me an example,” then provide suggestions based on the answers you have received to the first three questions.	<i>For example, if 50 percent or more of a sample of customers report that they feel the representatives are doing a better job of responding to their needs than in the past, would that be sufficient evidence that the program is having an effect?</i>
If the manager suggests an overly broad or too-long-term measure—for example “See if turnover goes down”—then try to get closer to an immediate impact of the program.	<i>I understand that—ultimately—higher retention is the goal. But that will take a long time to show up and will be influenced by many other factors. Since we know retention is linked to employee satisfaction, would you agree that the program is working if, ten weeks after training, a majority of direct reports of the attendees rate them as more effective?</i>
If the manager is still struggling to define success, try asking a different way.	<i>Perhaps this will help: Imagine it is four months from now and we meet in the hall. You say to me: “That training program was the best investment I made this year.” What would have to be true for you to say that?</i>

Follow-Up

It is very important that you check your understanding and confirm the agreement in a follow-up memo after the meeting. Thank the person you interviewed and briefly summarize what you heard. This memorandum of understanding will give the interviewee a chance to correct any oversights or misunderstandings and will be a useful reference throughout the planning process.