Preface

Developing measurable objectives is perhaps the most important action that can be undertaken to ensure that projects or programs focus on results. This is a fundamental concept taught in our workshops, where we have trained more than 20,000 people in the implementation of the ROI Methodology. Moving beyond the classic development of learning objectives designed for most projects or programs, this new book, *Beyond Learning Objectives: Develop Measurable Objectives That Link to the Bottom Line*, shows step-by-step how to develop input, reaction, learning, application, impact, and even ROI objectives. Anyone developing a new project or program designed to drive performance improvement and business impact will find the exercises, tips, guidelines, and examples included in the book not only easy to use, but also an essential reference.

The Need for This Book

Walk into any learning and development department and you can quickly see the progress made in developing learning objectives. Trainers, learning specialists, development coordinators, performance improvement analysts, and many others have made tremendous strides in developing effective learning objectives. Why? In the 1960s, Robert Mager brought the issue of objectives clearly into focus with his book *Preparing Instructional Objectives*. Through many reprints and editions, this 62-page book has been a classic in the learning and development, education, and performance improvement fields. By showing how to develop meaningful, specific learning objectives, Mager helped
professionals understand how to develop focused content supporting these specific objectives. Many would agree that Mager’s influence is represented in the current progress in developing excellent learning objectives. His classic work has sold more than 1.5 million copies. Mager is no longer active in this field, but the book remains a classic, and professionals around the world recognize his name and his contribution.

Since that book was published, the need for evaluation data has changed. Data beyond what participants learn are needed to ensure that programs are working and showing value. To provide these data, programs and projects must be developed to achieve the results sought—this requires levels of objectives historically ignored. While there is a need for continuing focus on improving learning objectives, application and impact objectives must be developed to provide focus and direction to key stakeholders. Also, there is a legitimate need for input and reaction objectives, and even ROI objectives. Add to this the growing need for more detailed objectives in human resources, technology, quality, and marketing, and it’s obvious that a new book about developing objectives has a deliberate purpose.

Mager once said, “We should never develop objectives that we cannot control. We develop learning objectives only because we can control them in a classroom.” Now, even Mager would agree: Higher levels of objectives (particularly at the application and impact levels) provide focus for the participant, the facilitator, the designer, the developer, and the evaluator.

Mager was right—facilitators do not have complete control of objectives beyond the classroom. However, they can influence and ensure that facilitation positions participants for successful application. Objectives are developed for all stakeholders of the program. The facilitator has more control over the success of learning objectives, but the participants have more control over the success of application and impact objectives. The participants’ manager also influences the success of application and impact objectives. Program sponsors have more control over input and ROI objectives. Program designers have more control over the success of reaction objectives. Evaluators need all of the objectives so they know how to measure program success. You get the picture. Because many stakeholders must make these objectives work, different levels of objectives are needed to drive results.

Professionals in learning and development, education, performance improvement, technology, quality, and marketing need tools that will ensure initial business alignment keeps projects and programs focused on results. At the same time, they need to simplify the design, development, delivery, and evaluation of projects or programs. Clearly defined objectives provide help with all of these issues. Analysts develop these objectives directly from a needs assessment.
Designers and developers need clear direction as they develop content with specific examples, exercises, skill practices, and other processes to achieve success on the job. Facilitators and program organizers need clear direction on how to prepare individuals to implement the program and use the skills.

Participants need guidance about what they should achieve as a result of participating in a program or project. Objectives allow them to see clearly and understand the expectations and desired outcomes. Those who support or fund projects and programs need assurances that the program will add value beyond learning. Higher levels of objectives provide the connection to results. Some executives suggest, “It is not what they learn, but what they do with what they learn that makes the difference.” Evaluators struggling to measure the impact of a variety of different programs need all the help they can get. All levels of objectives tell them when, what, and how to measure the success when the objective is met.

In summary, this book will be a valuable guide to help all professionals involved in implementing projects, programs, initiatives, and solutions. It is a valuable, essential guide for the performance improvement communities. It will help managers, analysts, designers, developers, project leaders, facilitators, participants, sponsors, and evaluators increase the effectiveness of their work by creating clearly focused objectives that are perfectly aligned to their businesses.

How to Use This Book

This book describes a logical process and should be read sequentially. After the first read through, each part will serve as a quick reference as the reader begins to apply the content. The following tips focus on the frequently asked questions about developing objectives and provide readers with a guide to help find more detail on each issue.

Use this book when you need to do the following:

- **Convince others about the value and power of objectives.** This issue is crucial when asking stakeholders to develop objectives. They must see the value in objectives. This material is covered in detail in chapter 1, as the reasons for developing objectives are highlighted. However, subsequent chapters on the different levels of objectives offer clues as to the power of objectives.

- **Know when to develop objectives.** An obvious question is, when should objectives be developed? Chapter 2 shows why it is important to develop them at the beginning of a project. The case study in chapter 9 shows
that objectives can be developed in meetings with stakeholders even after the initial needs assessment is completed.

- **Determine who should develop objectives.** Chapter 2 describes the ideal source of objectives. The same chapter shows that others may be involved in helping set the objectives.

- **Know how to develop input and reaction objectives.** Sometimes professionals skip input and reaction objectives, thinking that input is required by the initial request or contract and that a positive reaction is always needed so there is no need to make a formal declaration. However, the project parameters should be clearly defined with input objectives. Chapter 3 provides the detail. The desired reaction from participants is critical. Chapter 4 shows how reaction objectives are developed.

- **Know how to develop learning objectives.** This may not be a concern for some professionals, particularly in the learning and development field, as they have been developing learning objectives for years. However, for a refresher on the basics, chapter 5 provides a quick reference.

- **Know how to develop application objectives.** For some reason, application objectives are often overlooked, assumed, or are not completely developed. These objectives are important. Details on how to develop them are contained in chapter 6.

- **Know how to develop impact objectives.** For some projects, the business connection is clearly known, because these measures often drive the need for the project. In others, the desired business impact is not so clear. Impact objectives are the most powerful set of objectives when linking programs and projects to the business. Chapter 7 explains how to develop them.

- **Know how to develop ROI objectives.** Developing ROI objectives is straightforward. However, the desired percentage return or benefit-cost ratio is often a mystery. Chapter 8 shows the four strategies to set this objective, along with examples.

- **See examples of objectives.** Examples of measures and objectives are provided at the end of most chapters.

- **Practice with objectives.** At the end of each chapter is a simple set of exercises to clarify misunderstandings about objectives. The answers are provided for clarification in Appendix A. Also, Appendix B contains a practical exercise on matching levels with objectives.

- **Experience the dialogue when developing objectives.** A case study in chapter 9 shows the dialogue involved in developing objectives when they were not developed initially by the analyst who determined if the project or program was needed.
See how objectives are a part of a major program. Many chapters give an example of objectives for a particular program, all intended to show the power and importance of different levels of objectives.

Participate in a special learning opportunity. For some readers, the best way to learn more about setting objectives is to participate in a workshop where there is an opportunity to learn, explore, and practice with other colleagues. These workshops are available through ASTD and the ROI Institute. Appendix C describes a specific workshop that supports this book.

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