Technique Selection Criteria Worksheet
Selecting Techniques to Deliver Impact and ROI

Use this worksheet to help select the techniques that are right for your project. The rating scale is for quantifying the advantages and disadvantages of each technique in terms of the 10 selection criteria.

Selection Criteria

We have developed 10 selection criteria to help you decide which techniques to use:

- **Cost.** One of the most important issues is how much the technique will cost. While the direct costs are usually considered, indirect costs should be included. A technique may involve purchasing software, implementing processes, or the cost of the time involved to implement the technique. This rating reflects the cost of the technique relative to the cost of other techniques.

- **Extent of technology.** The use of technology to enable the application of knowledge is growing dramatically. Some may want to invest heavily in technology, while others are skeptical and prefer less technology. Either way, the ratings provide an opportunity to identify the amount of technology needed for each technique. You will also want to consider the security and data privacy provisions. Depending on your organization's requirements, you may want to review your plans with the IT and information security teams.

- **Effectiveness.** Effectiveness is consistency and impact. The two issues are related. Some techniques seem to work every time and have a huge impact. Others may not always work, and the impact is very low. There is always a concern about effectiveness, which makes this an important consideration when selecting a technique.

- **Participant time.** Time is important and scarce. If a technique requires a lot of the participants' time it could be a turnoff if they don't see the value in it. The key is to understand which techniques take less time compared with those that take much more time, and to consider if the time invested is worth the outcomes you will achieve.

- **Participant's manager involvement.** The most influential individual to enable the use of the program content, beyond the learner's own motivation, is their immediate manager. Some of these techniques do not involve the participant's managers, while others involve them in a significant way. This is important to keep in mind because the manager's time is critical. You want to minimize the amount of time required of a manager while maximizing its effectiveness.

- **Time of others.** Sometimes other individuals are involved, such as subject matter experts, mentors, coaches, coordinators, support teams, and on-the-job trainers. Involving other people in a program is usually expensive and can be more complicated. To offset the cost, you could get creative and use internal resources—maybe internal

coaches or high performers who want to learn how to develop others—rather than having to pay for an outside person. The two issues are to control the time of others and the cost of that time.

- **Proven.** Some of the techniques presented in this book are time-tested, with hundreds of applications. Others have been used only a few times but show promise. The extent to which the technique is proven is another important consideration.
- **Ease of implementation.** Some techniques may require a lot of effort for designing and implementing the process, putting things in place, and ensuring that everything is working. Others may take less time for preparation and impact. Some techniques are difficult to implement, and others are easy. The issue is the ease of making it work.
- **Ease of use.** It's one thing to implement a technique, and it's another thing for others to use it and successfully apply it, particularly the participants. If a technique is complex and cumbersome, it may turn off the users, making it unsuccessful. If it is easy to use, it may work and be successful.
- **Innovation.** Finally, you need to consider the technique's degree of innovation. In this ever-changing field, there are many possible techniques to use and the list is growing. Some techniques are very innovative in their design and approach, while others are very simple and time-tested and have been operational for many years. If innovation is important to your organization and your learners, this will need to be considered. Some people like to try new approaches.

Ranking Scale

Rank the criteria on a 1 to 5 scale, indicating the degree of intensity for each:

- **Costs:** 1 = very inexpensive; 5 = very expensive
- **Extent of technology:** 1 = very little technology; 5 = very high technology
- **Effectiveness:** 1 = very low level of effectiveness in delivering results; 5 = very high level of effectiveness
- **Participant time:** 1 = small investment of time; 5 = large investment of time
- **Participant's manager involvement:** 1 = low involvement; 5 = very significant involvement
- **Time of others:** 1 = small investment of time; 5 = large investment of time
- **Proven:** 1 = not yet proven; 5 = proven in hundreds of applications
- **Ease of implementation:** 1 = difficult to implement; 5 = very easy to implement
- **Ease of use:** 1 = difficult to use; 5 = very easy to use
- **Innovation:** 1 = very low level of innovation; 5 = very high level of innovation

Technique Selection Criteria Worksheet

Use the rating scale for each of the 10 criteria to rank the techniques in the left-hand column.

Technique	Costs	Extent of Technology	Effectiveness	Participant Time	Participant's Manager Involvement	Time of Others	Proven	Ease of Implementation	Ease of Use	Innovation
1. Define virtual learning										
2. Design for interaction, engagement, and application										
3. Select the right platform										
4. Prepare facilitators to support learning transfer										
5. Send more than a calendar invite										
6. Set participant expectations in advance										
7. Clearly communicate objectives										
8. Create an evaluation plan										
9. Create job aids and application guides										
10. Create custom self-objectives										
11. Create a kickoff event, and include managers										
12. Design a manager guide to accompany the learning experience										
13. Ensure easy access to application and impact data										
14. Use a commitment contract with participants										

Technique	Costs	Extent of Technology	Effectiveness	Participant Time	Participant's Manager Involvement	Time of Others	Proven	Ease of Implementation	Ease of Use	Innovation
15. Use the platform's welcome message to reinforce purpose										
16. Create a warm welcome										
17. Create immediate interaction										
18. Include WIIFM at the start										
19. Make it social										
20. Select activities for maximum involvement										
21. Ask questions with intent and inclusion										
22. Use the tools creatively										
23. Use visuals to keep attention										
24. Use realistic scenarios										
25. Incorporate formative feedback										
26. Include self-reflection time										
27. Teach to application and impact										
28. Integrate application activities										
29. Connect content between sessions										
30. Have action plan presentations										
31. Finish with a call to action										

Technique	Costs	Extent of Technology	Effectiveness	Participant Time	Participant's Manager Involvement	Time of Others	Proven	Ease of Implementation	Ease of Use	Innovation
32. Follow up on action plans										
33. One-on-one coaching after the program										
34. Manager encouragement and involvement using feedback loops										
35. Group coaching after the program and implementation phase										
36. Apply nudging techniques										
37. Observation sessions with an on-the-job trainer										
38. Host a lessons-learned meeting once participants have used the content										
39. Meaningful business projects with lessons-learned graduation										
40. Share success with other participants and key lessons learned										
41. Hold a contest based on achieving success for application and impact										
42. Leverage chatbots for learning transfer										
43. Augment your chatbot with human coaching										
44. Use coaching videos										
45. Apps and guided support software to enable use										
46. Use automated reminders and nudges for application and impact										

Technique	Costs	Extent of Technology	Effectiveness	Participant Time	Participant's Manager Involvement	Time of Others	Proven	Ease of Implementation	Ease of Use	Innovation
47. Use selfies to share										
48. Use social media groups or platforms to network for encouragement, support, and enablement										
49. Post-program recorded content reviews or application tips										
50. Use AI to gauge the effectiveness of communication in virtual conversations										