SuccessFactors Learning: Training Evaluations

Classroom Guide

v 6.4
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Course Introduction

Through discussion, demonstration, and hands-on computer lab work, this course teaches you the concepts and terminology associated with the training evaluation feature in the SuccessFactors Learning Management System (LMS). You will develop a working knowledge of this model for use in implementation of your training evaluation program. You will also gain basic skills in how to use SuccessFactors Learning to create and modify questionnaire surveys, associate surveys to items, and report on survey results using the step-by-step, hands-on lab exercises.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

♦ Describe the training evaluation model used to implement surveys
♦ Setup, configure, and edit item evaluation surveys
♦ Setup, configure, and edit follow-up evaluation surveys
♦ Setup learning evaluation
♦ Launch and complete assigned survey(s) as a user
♦ Access survey results through analysis reports

TARGET AUDIENCE

This training is intended for SuccessFactors Learning administrators (admins) responsible for adding and/or editing item (course) records.
ASSUMPTIONS

The SuccessFactors Learning system is highly configurable. During this training, you will be working in a representative environment. To properly progress through the training and when navigating the system, you must understand some assumptions.

Browser Pop-up Window

Do not block pop-up windows in your browser. Please unblock pop-up windows so that the application may function as designed.

When you first log in to SuccessFactors Learning, the following message banner may display at the top of your browser window:

Pop-up blocked. To see this pop-up or additional options, click here.

If this banner displays, perform the following steps:

1. Click the pop-up blocked message.
   A box displays with a few options.
2. Select the **Always allow pop-ups from this site** option.
3. Click **Yes**.
4. Once the setting is selected, you will not see the pop-up blocked warning again.

Administrator Role and Workflows

This training assumes that your SuccessFactors Learning administrator role is associated with all available workflows in the system. If your role does not include certain workflows, those tabs and pages will be grayed out and/or inaccessible.
Required Fields

Your system administrator configured specific fields throughout the system as *required* based on your organization’s business rules and processes. These required fields are indicated with a red asterisk (*). You must input data in these fields before you are allowed to progress.

If you are using SuccessFactors Learning for training, the fields displayed and marked as required may not reflect the settings you will encounter when accessing your organization’s system. Your system administrator can provide you with a list of the required fields for your organization.

**USING THIS GUIDE**

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="activity_icon.png" alt="Activity" /></td>
<td><strong>Activity</strong>: Indicates an activity for you to complete that helps reinforce the information you just learned.</td>
</tr>
<tr>
<td><img src="note_icon.png" alt="Note" /></td>
<td><strong>Note</strong>: Indicates additional information that is related to the information presented.</td>
</tr>
<tr>
<td><img src="tip_icon.png" alt="Tip" /></td>
<td><strong>Tip</strong>: Indicates helpful hints and tips or other guidance that further explains the information it accompanies.</td>
</tr>
<tr>
<td>Icon</td>
<td>Definition</td>
</tr>
<tr>
<td>------</td>
<td>------------</td>
</tr>
<tr>
<td><img src="image" alt="Lab Icon" /></td>
<td><strong>Lab</strong>: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.</td>
</tr>
<tr>
<td><img src="image" alt="Job Aid Icon" /></td>
<td><strong>Job Aid</strong>: Indicates there is a job aid available for the task. Job aids provide detailed instructions and screen captures to help you complete a task.</td>
</tr>
<tr>
<td><img src="image" alt="Warning Icon" /></td>
<td><strong>Warning</strong>: Warns against particular actions, or that a particular condition might indicate a problem.</td>
</tr>
<tr>
<td><img src="image" alt="Workflow Icon" /></td>
<td><strong>Workflow</strong>: Indicates you must have the proper security workflow assigned to you in order to have access to this feature or action.</td>
</tr>
</tbody>
</table>

**ADDITIONAL RESOURCES**

There are a number of additional resources that can provide you more information about the SuccessFactors Learning system. These resources include:

- SuccessFactors, Inc. website: [http://www.successfactors.com](http://www.successfactors.com)
- Online system help
- Task-specific job aids
- SuccessFactors monthly newsletter

For more information about other courses and registration, contact SuccessFactors University at training@successfactors.com.
Lesson 1: Training Evaluation Overview

The goal of Lesson 1 is to establish a general understanding of the concepts and terminology associated with the training evaluation model.

OBJECTIVES

Upon completion of this lesson, you will be able to identify all levels of evaluation.

TRAINING EVALUATIONS OVERVIEW

The final step for any training program is a summative evaluation in which you measure how effectively the training program accomplished its stated goals. Time and money often trump this step in the training process. Training departments with limited budgets often assume new programs are effective and put dollars that should go into evaluation into the next program. However, as senior executives demand more accountability from training efforts, interest is certain to increase in measuring and reporting results. The training evaluation feature in SuccessFactors Learning can help streamline this process by providing easy to use surveys with rapid reporting.
Assessing training effectiveness often entails using a four-level model, similar to one developed by Donald Kirkpatrick. According to Kirkpatrick’s model, evaluation should always begin with level one, and then, as time and budget allows, should move sequentially through the remaining levels. Information from each prior level serves as a base for the next level's evaluation. Thus, each successive level represents a more precise measure of the effectiveness of the training program, but at the same time requires a more rigorous and time-consuming analysis (Figure 1).

The four levels of the evaluation model essentially measure:

- **Level 1: Reaction** - What learners thought and felt about the training
- **Level 2: Learning** - The resulting increase in knowledge or capability
- **Level 3: Behavior** - Extent of behavior and capability improvement and implementation/application
- **Level 4: Results** - The effects on the business or environment resulting from the learner’s performance

Figure 1. Kirkpatrick’s Learning Evaluation Model
**TERMS AND DEFINITIONS**

Table 1 lists the terms and definitions associated with the training evaluation model in SuccessFactors Learning.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Any person for whom a database record has been created in SuccessFactors Learning, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses.</td>
</tr>
<tr>
<td>Item</td>
<td>An assignable unit that can be tracked. It may be a learning or non-learning activity.</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>A configurable entity which can be associated and distributed with items. Results are captured and analyzed in reports.</td>
</tr>
<tr>
<td>Survey</td>
<td>A configurable entity which can be associated and distributed with items. Results are captured and analyzed in reports.</td>
</tr>
<tr>
<td>Rating Scale</td>
<td>A configurable reference table that can be associated with assessments, performance processes, competencies, and surveys and is used to rate users.</td>
</tr>
<tr>
<td>QE</td>
<td>Question Editor is the tool used to create questions for use in exams.</td>
</tr>
</tbody>
</table>

**IMPLEMENTING THE MODEL: THE SCENARIO**

Throughout this guide, the instruction of the training evaluation model will be accompanied by a sample scenario.

Consider this scenario: You are on a Human Resource’s team responsible for the design and implementation of communication courses designed to improve the quality of all forms of communication throughout your company. One of the courses created focuses on dealing with customers, conflict, and confrontation. This is an online course and is available to all employees.
Using the scenario, adhere to the following steps to successfully implement a training evaluation model:

1. Identify training program(s) (item) to be evaluated - *online communication course*.

2. Create survey to capture users’ reaction to the training.

3. Create pre- and post-exams (using Question Editor) to assess users’ knowledge prior to the course and potential knowledge gain after completion of course.

4. Create survey to follow-up on behavioral change or application of learning after the training.

5. Configure item(s) Evaluations tab.

6. Assign learning needs to users.

7. User completes survey(s) upon completion of item.

8. Run report(s) to analyze results.
With the training evaluation tools in SuccessFactors Learning, an admin can create surveys to support an item-level evaluation, and a follow-up evaluation. Using Question Editor to create pre- and post-exams rounds out the necessary tools in SuccessFactors Learning to fully support the implementation of the first three levels of a training evaluation model (Figure 2).

![Diagram of Training Evaluation Model]

Figure 2. Implementing Training Evaluation Model
PRE-CONFIGURED REQUIREMENTS

The ability to support a training evaluation model within SuccessFactors Learning relies on some pre-configured entities. For example, the pre- and post-exams used for a learning evaluation are exams created using Question Editor.

Item Record

An item must exist in SuccessFactors Learning; surveys are associated with item records. For the purpose of this course, create an online item focused on dealing with customers, conflict, and confrontation.

Completion Status Configuration

Review, or create, completion status references. For each completion status, there is an option to include learning events with this completion status for item evaluation survey and/or follow-up evaluation surveys. For example, the completion status of Read and Acknowledged is not eligible for a follow-up survey assignment (Figure 3).

Figure 3. Completion Status Reference Record
Rating Scale

Rating scale questions can be used with surveys. It is recommended, when implementing item evaluation and follow-up evaluation surveys, to use at least two applicable rating scales. For example, the first rating scale could be a five-point scale used for an item evaluation survey. The second rating scale could be a frequency scale used for a follow-up evaluation survey.

Sample item evaluation five-point rating scale:

<table>
<thead>
<tr>
<th>Unsatisfactory</th>
<th>Needs Work</th>
<th>Satisfactory</th>
<th>Exceeds Expectations</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Sample follow-up evaluation five-point frequency rating scale:

<table>
<thead>
<tr>
<th>Never</th>
<th>Seldom</th>
<th>Mostly</th>
<th>Frequently</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

SuccessFactors Exams

Exams are created using Question Editor, at least one pre-exam and one post-exam. During the process of content creation, objectives are defined and assessments are structured. Using SuccessFactors Learning to capture the objectives to be assessed is a critical first step for analysis. Tying those objectives to questions, which are then created using Question Editor, allows for a more thorough analysis of knowledge prior to the content being delivered, and knowledge gained after the content was delivered in a learning evaluation report when used in pre- and post-exams.

Note: Please refer to the SuccessFactors Online Exams guide for additional information on how to create objective records, questions, and exams.
CONCLUSION

In this lesson, you learned the concepts and terminology associated with the training evaluation model.

You should now be able to identify all levels of evaluation.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
The final step for any training program is a summative evaluation in which you measure how effectively the training program accomplished its stated goals.

2. The fourth level of evaluation measures ______, and can be the most difficult to implement for a training program.
   a) Learning
   b) Reaction
   c) Behavior
   d) Results
Notes
Lesson 2: Item Evaluation

The goal of Lesson 2 is to begin building the first survey to support evaluation of the users’ reaction to the training.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Create an item evaluation survey
♦ Edit details of item evaluation survey
♦ Preview and publish item evaluation survey
♦ Associate survey with item

ITEM EVALUATION: USER SATISFACTION

An item evaluation is a questionnaire survey that is built to assess a user’s reaction to a training event. It is typically most effective if delivered immediately after the training event ends, when a user’s reaction is still fresh in his/her mind. This evaluation is sometimes referred to as a ‘smile sheet’ or ‘happy sheet’ because, in their simplest form, they measure how well users liked the training.

However, this type of evaluation can reveal valuable data if the questions asked are more complex. For example, this questionnaire could move beyond how well the users liked the training to questions about:

♦ Relevance of the objectives
Training Evaluations

- Ability of the course to maintain interest
- Amount and appropriateness of interactive exercises
- Ease of navigation
- Perceived value and transferability to the workplace

Questions asked on a typical item evaluation survey cover the basics of a course and can be grouped according to focus area. For example, one set of questions might be related to the effectiveness of the instructor, and another set of questions might inquire about the usefulness of the materials. Because this type of evaluation is so easy and inexpensive to administer, it usually is conducted in most organizations.

Within SuccessFactors Learning, an item evaluation questionnaire survey can be structured with one or more pages, and one or more questions per page (Figure 4).
**QUESTION TYPES**

When building your item evaluation, you must create questions and answer choices. There are four types of questions:

- **Rating Scale:** Use this question type when you want to get quantitative results.

- **One Choice:** Use this question type when you want the user to choose one correct answer from a group. When you enter the possible answer choices, you must separate each one by a carriage return.

- **Multiple Choice:** Use this question type when you want the user to be able to choose multiple correct answers from a group. When you enter the possible answer choices, you must separate each one by a carriage return.

- **Open Ended:** Use this question type when you want the user to type an answer (up to 3,990 characters).

*Note:* It is encouraged to use the same rating scale per question throughout a survey in order to provide a mean score across the entire survey.

It is important to keep in mind the type of training event the survey will be used to assess. Ensure that the questions being asked are applicable and relevant. For example, a set of questions on how well an instructor kept the class engaged might not apply to an online course.
Activity

Scenario

An online course on how to deal with customers, conflict, and confrontation has been created. You are responsible for creating the item evaluation survey to be assigned to all users immediately after the course is completed. This is the general course evaluation survey to be used after every online HR course.

Task

Write down additional questions for each page of this survey. Each question will be a rating scale type using the five-point scale (created previously). The comments question at the end of each page is an open-ended question type.

This data will be used to complete Lab 1.
**Survey Instructions:** Please help us improve our quality. Your feedback is important to us. Complete the survey to the best of your ability.

---

**Page 1 Title:** General Course Feedback (question type: rating scale)

**Page 1 Instructions:** Please complete the following questions to the best of your ability.

- The training was relevant to my job.

*Comments (question type: open ended)*

---

**Page 2 Title:** Training Materials Feedback (question type: same rating scale as above)

**Page 2 Instructions:** Please complete the following questions to the best of your ability.

- The visual aids were accurate and of good quality.

*Comments (question type: open ended)*

---

**Page 3 Title:** Online Instructions (question type: same rating scale as above)

**Page 3 Instructions:** Please complete the following questions to the best of your ability.

- The directions on how to use the online course were communicated effectively.

*Comments (question type: open ended)*

---

**Page 4 Title:** Training Methods Feedback (question type: same rating scale as above)

**Page 4 Instructions:** Please complete the following questions to the best of your ability.

- The right information was covered at the right speed for me.

*Comments (question type: open ended)*
Lab 1.  Create Draft Survey and Add Questions: Item Evaluation

Step

1. Navigate to **Learning > Questionnaire Surveys**.

2. Click **Add New**.

3. Enter a survey ID.

4. Enter a survey name.

5. Select an evaluation level (for this example, select **Item Evaluation: User Satisfaction**).

6. Enter survey description.

7. Enter comments.

8. Select domain.

9. Check **Active** checkbox.

10. Click **Add**.

11. Select the **Questions** tab.

12. Enter survey instructions.


14. Enter first page instructions.

15. Click **Add Question** icon ( ).

16. Enter question stem.

17. Select question type (rating scale).

18. Select a rating scale.
19. Repeat steps 15-18 to add additional questions.

20. Click Add Page icon ( ).


22. Enter second page instructions.

23. Click Add Question icon ( ).

24. Enter question stem.

25. Select question type (rating scale).

26. Select a rating scale.

27. Repeat steps 23-26 to add additional questions.

28. Click Save Draft.

Job Aid: Item Evaluation Survey (Tasks A and B)
**Configuration Options**

Each item evaluation survey has the ability to be configured uniquely. A survey can be configured to be submitted anonymously by users. This prevents an administrator accessing reports from identifying certain feedback from a specific user. A survey can be required for item completion causing the item to sit in a pending state until the survey has been completed and submitted by the user at which time the item will be moved to the user’s Completed Work.

In order to ensure there is a defined period in which users should submit feedback, a configurable number of days can be entered to determine a date by which the user should complete and submit the survey. If the user does not complete the survey in the timeframe configured, the survey will move into an overdue status. However, even though the survey is considered overdue, the user will still have the ability to open, complete, and submit the survey.

The admin has the ability to remove item and follow-up evaluations from user records, which is especially useful for overdue surveys. This can be done by accessing the Surveys tab of the user record or using the User Needs Management tool.
A comments section can be added after each question for additional feedback per question (Figure 5).

Figure 5. Configuration Options for Item Evaluation Survey

NOTIFICATIONS

There are two notification templates associated with the questionnaire survey functionality:

- Questionnaire Survey Assignment Notification Email Template
- Questionnaire Survey Assignment Notification RollUp Email Template

A user is sent a notification upon the assignment of a survey. (It is recommended to embed a questionnaire survey direct link into the notification template to generate an actual link within the email.) An item evaluation survey is assigned to a user upon completion of an item (a learning event is recorded) (Figure 6). A follow-up survey is assigned to a user and/or the user’s supervisor in a configurable number of days after item completion and is triggered by an automatic process manager (APM).
Similar to other notification areas in SuccessFactors Learning, an administrator is able to attach documents to notifications.

**PREVIEW AND PUBLISH**

Once a survey has been created, it is important to preview the draft survey before publishing and making it available for use. From the Questions tab, click the **Preview** button and select **Draft** for an option to preview the draft version of the survey (Figure 7).
Once you have reviewed your questions and layout, close the preview and return to the Questions tab. Click the Publish button to officially publish and make this survey available. Once a survey is published, it can be associated with one or more items.
Lab 2. Configure Options and Notifications for Draft Survey: Item Evaluation

Step

1. Access survey record from the previous lab.

2. Select the Options tab.

3. Select Yes for anonymous surveys.

4. Check the Required for Item Completion checkbox.

5. Enter number of days to complete survey from assignment.

6. Select option to include comments field for each question.

7. Click Apply Changes.

8. Select the Notifications tab.

9. If necessary, edit body of notification message.

10. Click Apply Changes.

11. If necessary, click Browse to add an attachment to notification.

12. Click Apply Changes.

Job Aid: Item Evaluation Survey (Task C)
Lab 3. Preview and Publish Survey: Item Evaluation

Step

1. Select the Questions tab.

2. Click Preview.

3. Select Draft from drop-down menu.

4. Review preview of survey.

5. Click Close to close preview of survey.

6. Click Publish. The survey is now ready for use.

Note: Once a survey is published, the Questions tab will have two button options - Preview and Create Draft. Click Preview to view the published survey. Click Create Draft to make minor edits to the survey content such as misspellings that were overlooked during the draft version. Click Publish to re-publish the survey after making edits.

Job Aid: Item Evaluation Survey (Task D)
ASSOCIATE SURVEY WITH ITEM

Associating a survey with an item is the next step. There are two functional ways to associate a survey with an item. First, the association can be made within the questionnaire survey from the Item Usage tab (Figure 8).

Figure 8. Questionnaire Survey record > Item Usage tab

Or, an association between the item and a survey can be created within an item record from the Evaluations tab (Figure 9).
From the questionnaire survey record, an admin can view the number of users assigned who have completed the item and been assigned to the survey, the number of completed surveys, the percentage of assigned surveys that have been completed, and a mean score for the survey results. The mean score is the average of all the rating scale question responses across all completed surveys for that item. For each item associated with the survey, the system calculates the mean score only if, for all surveys completed for that item, all the rating scale type questions use the same rating scale as specified in the Rating Scale field.

It is also possible to run a report from this screen on item evaluation results.

It is only possible to associate one survey per item. Therefore if a survey is already associated with an item, you will receive a warning message while attempting to associate another survey. You are given the option to remove the previous survey with the current one, or cancel the association process (Figure 10).
Warning

Warning Details:

- In the current selection, one or more items for creating Survey-tem association is already associated with another survey. Current Survey-tem Association will be removed and new Association will be established. The below section has the details listed.
- Pressing yes will replace current Survey-tem Association
- Pressing no will return to the previous page.

Do you wish to proceed?

Affected Survey-tem(s) Association Details

<table>
<thead>
<tr>
<th>Item</th>
<th>Survey ID (Survey Name)</th>
<th>Survey Assignment Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>COURSE ADM0102 (Rev 4 - 12/23/2004 02:03 PM Americas/New York)</td>
<td>Level 1 Survey (SuccessFactors Global University Feedback Survey)</td>
<td>Required for Completion</td>
</tr>
</tbody>
</table>

Figure 10. Warning Message
Lab 4.  Associate Survey with Item: Item Evaluation

Step

1. Select the Item Usage tab.

2. Click the add one or more from list link.

3. Search for one or more items.

4. Select one or more items from results list.

5. Click Add.

Job Aid: Item Evaluation Survey (Task E)
Lab 5.  Associate Item with Survey: Item Evaluation

Step

1. Navigate to Learning > Items.

2. Search for an item.

3. Click the item key link to access the item in edit mode.

4. Click More from the Related area.

5. Select the Evaluations tab.

6. In the Item Evaluation: User Satisfaction section, click the search icon (🔍) to search for and select a questionnaire survey.

7. Click Apply Changes.

8. Depending on how the survey was configured, the Days to Complete field and the Required for Completion checkbox may or may not be auto-filled. If necessary, change these fields. If desired, enter or change the Days to Complete number and check/uncheck the Required for Item Completion checkbox.

9. If any changes are made, click Apply Changes to save your modifications.
CONCLUSION

In this lesson, you built the first survey to support evaluation of the users’ reaction to the training.

You should now be able to:
- Create an item evaluation survey
- Edit details of item evaluation survey
- Preview and publish item evaluation survey
- Associate survey with item
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. The most effective question type to use in order to obtain quantitative results is:
   a) Open Ended
   b) One Choice
   c) Multiple Responses
   d) Rating Scale

2. True or false:
   There is a one-to-one relationship between an item and a questionnaire survey.
Lesson 3: Learning Evaluation

The goal of Lesson 3 is to create an association between previously created exams and an item as pre- and post-exams.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Associate exams with an item as pre- and/or post-exams

SET UP LEARNING EVALUATIONS

Configuring an item to support learning evaluations is simple if the exams to be used as pre- and post-exams have already been created. Otherwise, it is encouraged that you refer to the SuccessFactors Learning: Online Exams guide for additional information on how to create objectives, how to create questions using Question Editor, and how to create an exam from those questions. Although it is optional to associate objectives with questions using Question Editor, it is highly encouraged to use this methodology when creating questions to be used in pre- and post-exams that are part of an evaluation model. Learning evaluation reports display results per objective; however, this information is not available if the questions are not tied to objectives.

The purpose of a pre- and post-exam is to assess the user population’s knowledge of the content prior to the training, and then just after the training. Hopefully, if the training program is
effective, there will be a demonstrative increase in knowledge when the two exam results are compared (Figure 11).

![Sample Learning Evaluation Report](image)

**Figure 11. Sample Learning Evaluation Report**

An item’s original classification may change when configuring to support a learning evaluation. If the item is online, associating one or more exam objects does not affect the online classification. If the item is instructor-led, associating one or more exam objects will change the classification from *instructor-led* to *blended*.
Lab 6.  Associate Pre- and Post-Exams: Learning Evaluation

Step

1. Navigate to Learning > Items.

2. Search for and access an item record in edit mode.

3. Click More from the Related area.

4. Select the Evaluations tab.

5. In the Learning Evaluation: Mastery of Content section, click the drop-down menu for pre-exam and select the desired exam.

6. Click the drop-down menu for post-exam and select the desired exam.

7. Click Apply Changes.

Job Aid: Associate Pre- and Post-Exams - Learning Evaluation
CONCLUSION

In this lesson, you created an association between previously created exams and an item as pre- and post-exams.

You should now be able to associate exams with an item as pre- and/or post-exams.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   It is a best practice to associate objectives with questions for reporting and analysis.
Lesson 4: Follow-up Evaluation

The goal of Lesson 4 is to build the second survey to support evaluation of the users’ behavior after the training, and assess their application of knowledge gained.

**OBJECTIVES**

Upon completion of this lesson, you will be able to:

- Create a follow-up evaluation survey
- Edit details of follow-up evaluation survey
- Publish follow-up evaluation survey
- Associate survey with item
- Configure automatic process (APM)

**FOLLOW-UP EVALUATION: APPLICATION OF LEARNING**

Learners typically score well on post-tests, but the real question is whether or not any of the new knowledge and skills are retained and transferred back on the job. Follow-up evaluations attempt to answer whether or not learners’ behaviors actually change as a result of new learning.

Ideally, this measurement is conducted three to six months after the training program. By allowing some time to pass, learners have the opportunity to implement new skills and retention rates can be checked. Observation surveys are used, sometimes called
behavioral scorecards. Surveys can be completed by the user and/or the user’s supervisor.

In Lesson 2, item evaluation questionnaire surveys were created. Functionally, the creation of a follow-up evaluation questionnaire survey is the same as an item evaluation questionnaire survey. However, theoretically, they have two different purposes and therefore the line of questioning is radically different.

For example, follow-up survey questions evaluating a sales training program might include:

♦ Did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?
♦ Was the representative able to analyze and describe to you the category of customers’ objections as either valid, misinformation, or smokescreen?
♦ Did the representative use the appropriate model answer in response to each objection?

These questions can be reworded to best fit the need of the program and evaluation methodology. For example, the same questions above could be reworded to be used with a rating scale defined by frequency:

♦ How often did the representative open each customer dialogue with a product benefit statement, followed by a request to proceed?
♦ How often was the representative able to analyze and describe to you the category of customers’ objections as either valid, misinformation, or smokescreen?
Activity

Scenario

When the online course on how to deal with customers, conflict, and confrontation is finished by employees, they will need to complete a follow-up evaluation survey. You are responsible for creating the questions for the follow-up evaluation survey to be assigned to all users and supervisors. In the next activity, we will configure the survey.

Task

Using the previous labs in this course as a guide, complete the following tasks on your own:

♦ Create a follow-up evaluation survey using the sample questions on the next page.

♦ Write additional questions for each page of this survey. Each question will use a rating scale type using the five-point frequency scale (created previously). The comments question at the end of each page is an open-ended question type.
Survey Instructions: Please complete this survey to the best of your ability on your capabilities before and after the training on specific tactics in dealing with confrontation and difficult people.

Page 1 Title: Rate your capability before the training. How did you deal with customer confrontation?

Page 1 Instructions: A lot of people cannot handle confrontation. They shake and lose control of their voice pitch, and cannot control their thoughts properly. It can be frustrating when someone is putting us down and you can’t argue back because you have confrontation jitters. This is the ‘flight or fight’ syndrome kicking in and it pumps adrenaline throughout your body in readiness to fight, or in readiness to run.

Answer these questions to see how you used to deal with confrontation before the training you received.

Before this training course, how often did you take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.

Comments (question type: open ended)
Page 2 Title: Rate your capability *after* the training - How *are* you *now* able to deal with customer confrontation?

Page 2 Instructions: A lot of people cannot handle confrontation and start to shake, they lose control of their voice pitch, and cannot control their thoughts properly. It can be frustrating when someone is putting us down and you can’t argue back as you have a touch of confrontation jitters. This is the ‘flight or fight’ syndrome kicking in and it pumps adrenaline throughout your body in readiness to fight, or in readiness to run.

Answer these questions to see how well you *now* deal with confrontation since the training you received.

Since this training course, how often do you currently take a deep breath just before a confrontational situation or during it if necessary? This lowers your heartbeat and blood pressure.

Comments *(question type: open ended)*
**CONFIGURATION OPTIONS**

Each follow-up evaluation survey has the ability to be configured uniquely to fit the business needs.

The follow-up evaluation can be assigned to users in a configurable number of days from completion of the item. The evaluation completion date is a configurable number of days from assignment.

A follow-up survey can be completed by the user (employee) only, the supervisor only, or both.

A comments section can be added after each question for additional feedback per question (Figure 12).

![Figure 12. Configuration Options for Follow-up Evaluation Survey](image-url)
Lab 7. Configure Options for Draft Survey: Follow-up Evaluation

Step

1. Navigate to Learning > Questionnaire Survey.

2. Search for and select the follow-up survey just created in the activity.

3. Select the Options tab.

4. To configure the post evaluation settings, enter a number of days from item completion to assign the follow-up survey, and a number of days to complete the survey.

5. Select the follow-up survey participants (employee, supervisor, or both).

6. Select option to include comments field for each question.

7. Click Apply Changes.

8. Select the Notifications tab.

9. If necessary, edit body of notification message.

10. Click Apply Changes.

11. If necessary, click Browse to add an attachment to notification.

12. Click Apply Changes.

13. Select the Questions tab.

14. Click Preview and then select Draft from drop-down menu.

15. Click Close to close preview of survey.

16. Click Publish. The survey is now ready for use.
Activity

Scenario

The online course on how to deal with customers, conflict, and confrontation is ready to be released to users. You have created the follow-up evaluation survey questions, and configured the survey to be assigned to all users and supervisors 120 days after the course is completed, with 7 days to complete. Now associate the survey with the online item.

Task

Using the previous labs in this course as a guide, complete the following task on your own.

♦ Associate the follow-up survey with the online item.

The next lab will introduce how to configure the automatic process to trigger the evaluation.
Lab 8. Configure APM: Follow-up Evaluation

Step


2. Enable this process to be scheduled.

3. Select frequency of synchronization, and enter configuration options.

4. Select a time-zone.

5. Enter an email address for notification.

6. Click Apply Changes.

Job Aid: Follow-up Evaluation Survey (Task G)
CONCLUSION

In this lesson, you built the second survey to support evaluation of the users’ behavior after the training, and assessed their application of knowledge gained.

You should now be able to:

♦ Create a follow-up evaluation survey
♦ Edit details of follow-up evaluation survey
♦ Publish follow-up evaluation survey
♦ Associate survey with item
♦ Configure automatic process (APM)
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   Follow-up evaluations attempt to answer whether or not learners' behaviors actually change as a result of new learning.

2. A functional difference between an item evaluation survey and a follow-up evaluation survey is:
   a) A follow-up evaluation survey can be configured to be assigned a certain number of days after item completion
   b) A follow-up evaluation survey is required
   c) An item evaluation survey assignment is triggered by an APM
Lesson 5:  
Survey Completion - User

The goal of Lesson 5 is to demonstrate how a user would access and complete training evaluations.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Launch and complete assigned surveys

SURVEY COMPLETION OVERVIEW

When a survey is assigned to a user, he/she will receive an email (if email is enabled and the user has a valid email address) and the survey displays in the To-Do List (Figure 13).

![Figure 13. User’s To-Do List](image-url)
When launched, if the survey has been configured to be anonymous, the checkbox at the top of the survey will be inactive. (Figure 14)

![Survey]

**Figure 14. User’s View of Survey**

If the survey is configured to be required for item completion, a warning message displays to the user if he/she had missed or skipped any questions in the survey when submitting.

On the other hand, if the survey is optional (not required for item completion), then the questions within the survey are also considered optional and the user has the ability to omit and skip questions when submitting. Furthermore, with an optional survey, the user has the ability to completely remove the survey from his/her To-Do List similar to a self assigned item.

Once a survey has been submitted, it disappears from the user’s view. There is no record of a survey completion in a user’s learning history (Completed Work).

When the user gets to the last page of the survey, a **Submit** button will be available to submit the completed survey (Figure 15). As a
user completes the survey, there is an option to save the survey. This allows the user to complete the survey at a later time.

Figure 15. Last Page of Survey
Training Evaluations

Activity

Scenario

The online course on how to deal with customers, conflict, and confrontation needs to be assigned to users. You are responsible for assigning this course to the appropriate employees.

Task

Using previous knowledge of SuccessFactors Learning as a guide, complete the following tasks on your own.

♦ Assign the item to one or more users.

♦ Record a learning event for the assigned item for one or more users to activate the surveys.
Lab 9. Launch and Complete Assigned Survey

Step

1. Log in to SuccessFactors Learning as a user.

2. Locate the survey on your To-Do List.

3. Click the survey title to launch.

4. Complete all questions/pages of the survey.

5. Click Submit.

Job Aid: Launch and Complete Assigned Survey (User Job Aid)
CONCLUSION

This lesson demonstrated how a user would access and complete training evaluations.

You should now be able to launch and complete assigned surveys.
LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:
   A completed survey remains in a user’s learning history (Completed Work).
Lesson 6: Survey Analysis Reports

The goal of Lesson 6 is to demonstrate how to access and run evaluation related reports.

OBJECTIVES

Upon completion of this lesson, you will be able to:

♦ Launch analysis reports

REPORTS OVERVIEW

There are specific reports to support analysis of each step of the training evaluation process.

Item Evaluation Reports

The Item Evaluation Report shows the mean score (the average results of the rating scale questions) for each survey; survey page; and survey question, and the percentage of users who selected each response (Figure 16).

The Item Evaluation by Individual Response Report shows each user’s responses to the survey questions.
Training Evaluations

Figure 16. Sample Item Evaluation Report

The Item Evaluation by Instructor Report shows the mean score (the average results of the rating scale questions) for each survey and survey page; grouped according to the instructor (Figure 17).

Figure 17. Sample Item Evaluation by Instructor Report
Lab 10.  Launch Item Evaluation Report

Step

1.  Navigate to Reports.

2.  Type evaluation in the Search box.

3.  Check the Learning checkbox in the Category section (you may have to un-check all the other options).

4.  Check the Published checkbox in the Publication Status section.

5.  Check the Admin checkbox in the Application section.

6.  Click Submit.

7.  Click the report title to open the report search window. You might need to click the (+) to get to the available reports.

8.  Enter the report criteria.

Learning Evaluation Report

The *Learning Evaluation Report* shows the training effectiveness of items based on the average pre-test and post-test mean scores (Figure 18).

![Sample Learning Evaluation Report](image)

**Figure 18. Sample Learning Evaluation Report**
Lab 11. Launch Learning Evaluation Report

**Step**

1. Navigate to Reports.

2. Type **evaluation** in the Search box.

3. Check the **Learning** checkbox in the Category section.

4. Check the **Published** checkbox in the Publication Status section.

5. Check the **Admin** checkbox in the Application section Click **Submit**.

6. Click the **report title** to open the report search window. You might need to click the (+) to get to the available reports.

7. Enter the report criteria.

8. Click **Run Report**.
Follow-up Evaluation Reports

The *Follow-up Evaluation Report* shows the mean score (the average results of the rating scale questions) for each follow-up survey; survey page; and survey question (Figure 19).

![Sample Follow-up Evaluation](image)

**Figure 19. Sample Follow-up Evaluation**
The Follow-up Evaluation by Individual Response Report shows the mean score (the average results of the rating scale questions) for each follow-up survey and survey page (Figure 20).

![Follow-up Evaluation by Individual Response Report](image)

Figure 20. Sample Follow-up Evaluation by Individual Response Report
Lab 12. Launch Follow-Up Evaluation Report

Step

1. Navigate to Reports.

2. Type evaluation in the Search box.

3. Check the Learning checkbox in the Category section.

4. Check the Published checkbox in the Publication Status section.

5. Check the Admin checkbox in the Application section

6. Click Submit.

7. Click the report title to open the report search window. You might need to click the (+) to get to the available reports.

8. Enter the report criteria.

CONCLUSION

This lesson demonstrated how to access and run evaluation related reports.

You should now be able to launch evaluation reports.
Notes
Course Summary

Through discussion, demonstration, and hands-on computer lab work, you learned the concepts and terminology associated with SuccessFactors Learning’s training evaluation feature. You developed a working knowledge of this model for use in implementation of their training evaluation program. You also gained basic skills in how to use SuccessFactors Learning to create and modify questionnaire surveys, associate surveys to items, and report on survey results using the step-by-step, hands-on lab exercises.

You should now be able to:

♦ Describe the training evaluation model used to implement surveys
♦ Setup, configure, and edit item evaluation surveys
♦ Setup, configure, and edit follow-up evaluation surveys
♦ Setup learning evaluation
♦ Launch and complete assigned survey(s) as a user
♦ Access survey results through analysis reports