2022 TRAINING APEX AWARDS QUALITATIVE SCORING GUIDELINES

EACH APPLICATION RECEIVES A TOTAL QUALITATIVE SCORE BETWEEN 0 AND 52. SO THE HIGHEST QUALITATIVE SCORE THAT CAN BE AWARDED IS 52. THIS SCORE IS ADDED TO THE QUANTITATIVE SCORE DERIVED BY OUR OUTSIDE RESEARCH COMPANY.

The following sections of the application are judged qualitatively:

- 2.0 Why Your Organization Should Be on the 2022 Training APEX Awards List
- 2.1 Goals
- 2.2 Training Programs Scope
- 2 Best Practice Submissions
- 1 Outstanding Training Initiative Submission
- 2.62b Training Efficiency and Effect on Organization
- 2.64 L&D Strategic Involvement
- 2.65 Executive Involvement in L&D
- 2.15 Training Delivery Methods
- 3.1 Evaluation
- 3.2 Business Metrics

Section 2.1: Training's Linkage to Strategic Business or Business Unit Goals and Demonstrated Effectiveness
(0 to 3 points)
Identify 3 specific, measurable, **numerical (quantifiable)** business or business unit **(not L&D)** goals set by senior leadership that the organization set out to achieve in the last year. For each goal, identify a specific training program and explain how it helped to meet the goal, and provide a **numerical (quantifiable)** Level 3 (behavior change—as seen by a third party such as a manager, direct report, colleague, or customer/patient; NOT self-reported) or Level 4 (business impact—i.e., sales/revenue increase, market share increase, customer satisfaction score improvement, employee productivity increase, employee retention improvement or turnover reduction, increased promotions, decreased safety violations, improved employee health/wellness,

improved net promoter score, etc.) result showing the training was effective. To achieve full credit, the results must tie back to the business goal.

Business goals typically fall into four categories:

Client Services: Pertaining to the products/services the company is providing
Business Development: Pertaining to expansion, including geographic, into new industries, etc.
Operations: Pertaining to running the business more efficiently/effectively
Talent: Pertaining to employee retention, engagement, performance, management, etc.

An example of a specific and measurable goal would be:

Expand our global footprint by opening 200 new stores in the next two years.

Scoring is as follows for EACH goal:

- .25 point is awarded for identifying a SPECIFIC, MEASURABLE, NUMERICAL (QUANTIFIABLE) business goal the company aimed to achieve **(Note that it is a business or business unit goal, NOT an L&D goal, and that points will only be awarded for *specific, measurable, numerical (quantifiable)* goals).**
- .25 point is awarded for describing a particular training program that aimed to help achieve the business goal.
- .5 point is awarded for providing specific numerical (quantifiable) Kirkpatrick Level 3 (behavior change—as seen by a third party such as a manager, direct report, colleague, or customer/patient; NOT self-reported) or Level 4 (business impact) results for the goal AND the results tie back to the business goal. **(Points will *not* be awarded for results that don't tie back to the original business goal—i.e., if the business goal is to increase sales 10%, but the results are that retention increased by 15%, points will not be awarded for results.)**

Section 2.2: Individual Training Programs' Role/Results in Achieving Strategic Business or Business Unit Goals (0 to 10 points)
Provide a sentence or two overview of what the organization does for each of the 20 types of training noted, indicate linkage to a SPECIFIC, MEASURABLE, NUMERICAL (QUANTIFIABLE) business or business unit goal (it does NOT have to be one of the three goals listed in Section 2.1) relevant to the particular training category, followed by a deeper dive into a specific program or course, and finish off with specific Level 3 (validated by a third party) and/or 4 results demonstrating the program's effectiveness that tie back to the specific, measurable, numerical (quantifiable) business goal. This should be done for each of the program sections.

Scoring is as follows for EACH of the 20 training types (.5 point for each):

- .10 point is awarded for detailing a specific training program.
- .10 point is awarded for identifying a SPECIFIC, MEASURABLE, NUMERICAL (QUANTIFIABLE) business or business unit goal relevant to the particular training category that the company aimed to achieve. **(Note that it is a business goal or business unit goal, NOT an L&D goal, and that points will only be rewarded for *specific, measurable* goals)**
- .30 point is awarded for providing specific numerical (quantifiable) Kirkpatrick Level 3 (behavior change—as seen by a third party such as a manager, direct report, colleague, or

customer/patient; NOT self-reported) or Level 4 (business impact) results that tie back to the corporate goal. **(Points will *not* be awarded for results that don't tie back to the original business goal—i.e., if the business goal is to increase sales 10%, but the results are that retention increased by 15%, points will not be awarded for results.)**

Best Practice Entry 1 (0 to 5 points)
Best Practice Entry 2 (0 to 5 points)

Define the project scope; use of training to achieve a specific, measurable, numerical (quantifiable) overall business or business unit goal (either one identified in Section 2.1 or a different one); innovation, reinforcement; senior leadership involvement, and demonstrable Level 3 (behavior change) or Level 4 (business impact) results tied back to the specific, measurable business goal.

NOTE: If no specific results (i.e., 10 percent reduction in customer complaints—NOT customer complaints were reduced) are provided, the submission cannot earn 5 points.

Scoring is as follows:

- **Project scope (1 point):** 1 point is awarded if the program trained learners companywide or across at least half of the company's business units/departments or 50 percent of the company's workforce; .5 point is awarded for several business units/departments or 25 percent of the company's workforce; and .25 point is awarded for a single business unit/department or less than 25 percent of the company's workforce. **Please be sure to define the scope of your submission in these terms.**
- **Business/business unit goal (1 point):** .5 point is awarded for listing the overall business or business unit goal and .5 point for the goal being specific, measurable, numerical (quantifiable), and relevant to the best practice (the goal can be one noted in Section 2.1 OR a different business goal).
- **Innovation (1 point):** .25 to 1 point is awarded for innovation from an overall training perspective OR for innovation in terms of training done in the applicant's industry. (Please see the Innovation section below for more details on what constitutes innovation.)
- **Reinforcement (.5 point):** .25 point is awarded for description of short-term reinforcement methods provided for up to 6 months after training, and .25 point for long-term reinforcement (more than 6 months after the training). **Please be sure to indicate each type of reinforcement (short-term and long-term) and the time period it takes place after training.**
- **Senior leadership involvement (.5 point):** .25 point is awarded if senior leaders (either C-suite or business unit executives) are involved in the design, development, or marketing of the program and .25 point if senior leaders (either C-suite or business unit executives) are involved in the facilitation of it. **The title of the executive involved MUST be provided in both cases. Please be sure to note the specific role particular executives play in order to get the full .5 point score.**
- **Level 3 (behavior change) AND 4 (business impact) results (1 point):** .5 point is awarded for specific, numerical (quantifiable) Level 3 (behavior change) results AND .5 point is awarded for specific, numerical (quantifiable) Level 4 (business impact) results as defined above **(in both cases, results must tie back to the original measurable business or business unit goal).**

NOTE: On the qualitative scorecard, judges will check the appropriate box for entries they believe should be considered for a separate Best Practice award (must achieve a 5-point score to qualify).

Outstanding Training Initiative (0 to 5 points)
Highlight project scope, use of training to achieve a specific, measurable, numerical (quantifiable) business or business unit strategic goal, innovation, reinforcement, senior leadership involvement, and demonstrable numerical (quantifiable) Level 3 (behavior change) or Level 4 (business impact) results that tie back to the specific, measurable corporate strategic goal.

Scoring is as follows:

- **Project scope (1 point):** 1 point is awarded for training learners in several business units/departments or at least 50 percent of the workforce; and .5 is awarded for training learners in a single business unit/department or less than 50 percent of the workforce. **Please be sure to define the scope of your submission in these terms.**
- **Business/business unit goal (1 point):** .5 point is awarded for listing the overall business or business unit goal and .5 point for the goal being specific, measurable, and numerical (quantifiable) and relevant to the outstanding training initiative (the goal can be one noted in Section 2.1 OR a different business goal).
- **Innovation (1 point):** .25 to 1 point is awarded for innovation from an overall training perspective OR for innovation in terms of training done in the applicant's industry. (Please see the Innovation section below for more details on what constitutes innovation.)
- **Reinforcement (.5 point):** .25 point is awarded for description of reinforcement provided for up to 3 months after the training and .25 point for longer-term reinforcement (planned for more than 3 months after the training). **Please be sure to indicate each type of reinforcement (short-term and long-term) and the time period it takes place after training.**
- **Senior leadership involvement (.5 point):** .25 point is awarded if senior leaders (either C-suite or business unit executives) are involved in the design, development, or marketing of the program and .25 point if senior leaders (either C-suite or business unit executives) are involved in the facilitation of it. **The title of the executive involved MUST be provided in both cases. Please be sure to note the specific role particular executives play in order to get the full .5 point score.**
- **Level 3 (behavior change) OR 4 (business impact) results (1 point):** 1 point is awarded for specific, numerical (quantifiable) Level 3 (behavior change) AND/OR specific, numerical (quantifiable) Level 4 (business impact) results as defined above (**in either case, results must tie back to the original measurable business or business unit goal).**

NOTE: On the scorecard, judges will check the appropriate box for entries they believe should be considered for a separate Outstanding Training Initiative award (must achieve a 5-point score to qualify).

Section 2.62b: Training Efficiency and Effect on Organization (0 to 2 points)

Scoring is as follows:

Project Scope (1 point):
- .5 point is awarded for listing the number of learners affected.

- .5 is awarded for detailing the portions of the company that reaped the benefit of the efficiency (entire company, multiple business units/functions/departments, single business unit/function/department).

Business Impact: (1 point)
- 1 is awarded point for detailing the specific business impact (i.e., $XX saved in travel costs; XX hours saved; X% increase in productivity; XX additional employees trained).

Section 2.64: L&D Governance Model and L&D's Role in Enabling the Business Strategy (0 to 4 points)

Scoring is as follows:

- .25 point is awarded for describing the L&D/Training reporting structure (including number of L&D/Training people involved)
- .25 is awarded for describing the L&D governance model.
- .5 point is rewarded for giving an example of how the model works successfully.
- .5 point is awarded for a member of the L&D/Training team (PROVIDE TITLE) being a member of the senior executive team. (Note: This could be the CHRO if L&D reports to that function).
- .5 point is awarded for at least one L&D member (PROVIDE TITLE OR TITLES) meeting regularly with *the senior executive team* (PROVIDE EXEC TITLES AND MEETING FREQUENCY—i.e., weekly, monthly, quarterly).
- .5 point is awarded for at least one L&D member (PROVIDE TITLE OR TITLES) meeting regularly with *business unit leaders* (PROVIDE EXEC TITLE AND MEETING FREQUENCY—i.e., daily, weekly, monthly, quarterly).
- .5 point is awarded for at least one L&D member (PROVIDE TITLE OR TITLES) participating in the organization's setting of annual corporate strategic goals.
- 1 point is awarded for an example of a training program that was created based on L&D's involvement in the organization's setting of annual strategic business goals. **NOTE: You must include details of the program, not just name it.**

Section 2.65: Involvement of Senior Leadership in Training/L&D Initiatives (0 to 4 points)
1 point is awarded for a specific EXAMPLE for each of the following:

- Top executives (PROVIDE TITLE OR TITLES—**these are NOT L&D executives**) are involved in training strategy meetings or training program kickoffs (PROVIDE DETAILS ON THE MEETINGS/TRAINING).
- Top executives (PROVIDE TITLE OR TITLES—**these are NOT L&D executives**) champion L&D initiatives at in-person events such as Town Halls or other company events OR record talks or videos on the importance of L&D initiatives (PROVIDE SPECIFICS).
- Top executives (PROVIDE TITLE OR TITLES—**these are NOT L&D executives**) serve as subject matter experts for training programs (PROVIDE PROGRAM NAME AND AN EXAMPLE OF THE CONTENT EXECS PROVIDE).
- Top executives (PROVIDE TITLE OR TITLES—**these are NOT L&D executives**) facilitate training courses or record course videos (PROVIDE COURSE NAMES).

Innovation of Training Programs and Delivery Methods (Sections 2.0 and 2.15) (0 to 3 points)

It can be innovation from a training delivery, content creation, or facilitation standpoint; innovatively solving a problem/challenge with training; innovation in technology; innovation in training organizational strategy, evaluation method, tracking training, communicating with learners/determining learner preferences, etc. Innovation can be something new that blows your socks off or a creative way of using something that's been around for a while. Innovation can be found in new training models/systems/processes. It can be found in new technologies. It can be found in cutting-edge research. It can be found in a new understanding of how people learn. Innovation also can be doing something in training that no one else in your industry is doing or something your company has never done before. **Think of it this way: What would make you say, "Wow! My organization needs to be doing this!" if you read it in the application?**

Scoring is as follows:

- A 0 to .5 score should be awarded for 1-3 areas showing innovation in Section 2.15.
- A .75 to 1 score should be awarded for 4-6 areas showing innovation in Section 2.15.
- A 1.25 to 1.5 score should be awarded for 7-9 areas showing innovation in Section 2.15.
- A 1.75 to 2 score should be awarded for 10-12 areas showing innovation in Section 2.15.
- A .25 to 1 score should be awarded for innovation shown in Section 2.0.

Section 3.1: Evaluation Results and Effectiveness (0 to 4 points)
Demonstrate what the organization is doing when it comes to evaluation and provide specific, numerical (quantifiable) examples showing its evaluation methods are successful based on demonstrated results.

Scoring is as follows:

Kirkpatrick Level 1 (.25 point total):
- .10 point is awarded for describing the evaluation method.
- .15 point is awarded for providing an example of a specific, numerical (quantifiable) evaluation result that demonstrates the training was effective (i.e., for instructor effectiveness, learners gave Sales Training 101 a 4.6 score on a scale of 1-5 in 2020).

Kirkpatrick Level 2 (.25 point total):
- .10 point is awarded for describing the evaluation method.
- .15 point is awarded for providing an example of a specific, numerical (quantifiable) evaluation result that demonstrates a particular training program was effective (i.e., 95% of 150 learners who took the Teller Certification program passed the final exam in 2020).

All other evaluation methods are worth .5 point as follows:
- .25 point is awarded for describing the evaluation method.
- .25 point is awarded for providing an example of a specific, numerical (quantifiable) evaluation result that demonstrates a particular training program was effective.

Section 3.2: Demonstrated Measurable Training Results as Determined by Business Metrics (0 to 7 points)
The business metrics should directly correlate to the specific, measurable, numerical (quantifiable) strategic business or business unit goals outlined in Section 2.1 or other specific strategic business or business unit goals. **The goal MUST be relevant to the category indicated (i.e., don't provide a safety goal for the revenue category).** Provide specific numerical (quantifiable) Level 4 (business impact) results demonstrating training's effectiveness. **NOTE:**

Level 3 (behavior change) results do NOT qualify for this section. Only those entries that include specific numerical (quantifiable) results that tie back to their respective business or business unit goals for ALL the categories will achieve a 7 score here.

Scoring is as follows for EACH metric:

- .10 point should be awarded for identifying the specific, measurable, numerical (quantifiable) business or business unit goal the company aimed to achieve **(Note that it is a business or business unit goal, NOT an L&D goal, and that points will only be awarded for** *specific, measurable, numerical (quantifiable)* **goals). The goal MUST be relevant to the category indicated (i.e., don't provide a safety goal for the revenue category).**
- .15 point should be awarded for identifying a particular training program that aimed to help achieve the business or business unit goal.
- .25 point should be awarded for detailing specific numerical (quantifiable) Kirkpatrick Level 4 (business impact) results that a particular training program achieved in relation to the specific business or business unit goal/expectation. **(Points will** *not* **be awarded for results that don't tie back to the original business goal—i.e., if the business goal is to increase sales 10%, but the results are that retention increased by 15%, points will not be awarded for results.)**