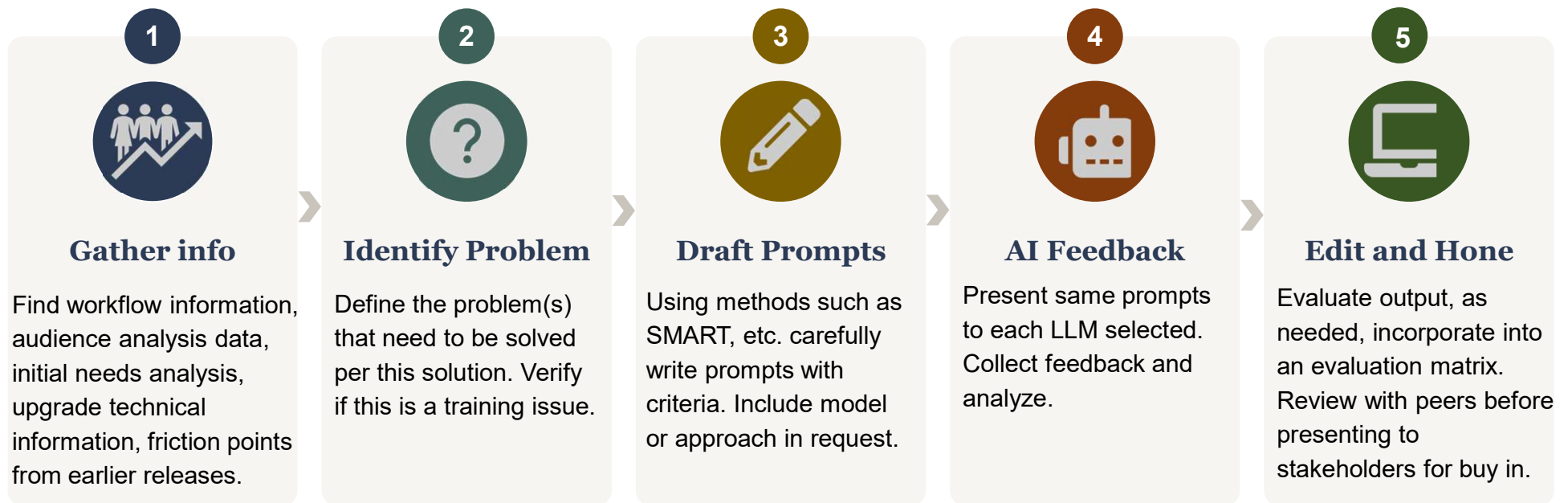


Leveraging AI to Draft an Evaluation Strategy

I used AI to help me draft a 4-level Kirkpatrick evaluation plan including measurable goals, lead & lag indicators and targets. I started with gathering information and a scenario, then identifying the problem that required training. I drafted my prompts for AI and used three different LLMs to prompt and updated final goal strategies based on the input from these three.



Sample Prompts

These are the prompts used to draft and refine the evaluation plan, from initial framing to measurable detail.

Prompt 1

I am developing a ID evaluation strategy using what I'm learning from the book "Building a Culture of Evaluation" - Using a scenario example of HealthConnect Epic Training upgrade, create/define 4 levels of Kirkpatrick evaluation using the principles identified in the book above. In addition, for each level provide an example of a measurable goal or metric. Start with Level 4 at the beginning and then go backwards.

Prompt 2

Can you give at least 3 ways to measure each level of evaluation in the example above? For each measurement provide a metric with a target. Be sure to distinguish between lead and lag indicators.

Kirkpatrick Evaluation Overview

Here's a brief overview of what each level of Kirkpatrick's evaluation focus on.

Level 4: Results (Organizational Impact)

Evaluates the overarching business outcomes, operational efficiency gains, and organizational return on investment generated by the training.

Level 3: Behavior (Job Application & Transfer)

Measures the degree to which learners successfully apply new skills, procedural steps, and workflows back on the job.

Level 2: Learning (Skill & Knowledge Acquisition)

Assesses the extent to which participants acquire the intended knowledge, skills, and cognitive capability against performance objectives.

Level 1: Reaction (Learner Engagement & Satisfaction)

Gauges participants' immediate perceptions, engagement levels, and overall satisfaction regarding the training's relevance and execution.

Kirkpatrick Evaluation Matrix for Epic Upgrade

Level/Goal`	Lead Indicators	Lag Indicators
Level 4: Results (Organizational Impact) Measurable Goals: - Reduce post-upgrade Electronic Health Record (EHR) charting error rates by 15% and decrease average patient encounter documentation time by 2 minutes within 90 days post-go-live. - Reduce documentation time per patient encounter by 10% within 6 months of upgrade go-live.	Leading indicators - Weekly documentation error rate trend (even before the 90-day mark) - Help desk ticket volume tied to the upgraded modules, tracked weekly - Early patient safety near-miss reports linked to the new workflow	Lagging indicators (the outcome itself): 90-day documentation error reduction (the 25% target) - Time-to-competency for new hires trained on the updated system post-rollout - Patient safety indicators over a full quarter
Level 3: Behavior (Job Application & Transfer) Measurable Goal: 90% of clinical staff demonstrate full adherence to updated Epic workflow protocols during post-training performance audits and peer observations 30 days post-rollout.	Leading indicators (early signals in the first 1-2 weeks post go-live): - EHR usage logs showing adoption of new workflow steps (order entry, documentation fields) - Super-user or floor-support ticket volume and content (what people are asking for help with) - Manager spot-check or direct observation checklists - Workaround detection (staff reverting to old paper processes or legacy workflow paths)	Lagging indicators (30-60-90 day confirmation): - Sustained workflow compliance rate (the 90% target) verified through EHR audits - Reduction in support ticket volume over time (a proxy for behavior becoming habitual) - Manager-reported observation data at 60 and 90 days
Level 2: Learning (Skill & Knowledge Acquisition) Measurable Goal: 95% of learners achieve a passing score of 85% or higher on the practical, scenario-based Epic system simulation assessment on their first attempt.	Leading indicators (during training): - In-session knowledge checks or practice scenario completion rates - Pre/post confidence self-ratings on specific Epic workflows - Simulation lab performance during training	Lagging indicators (confirm learning stuck): - Post-training assessment scores (the 80%+ benchmark) - Certification or sign-off rates by role (nurse, physician, front desk) - Score comparison across cohorts to catch instructional gaps early
Level 1: Reaction (Learner Engagement & Satisfaction) Measurable Goal: Achieve an average score of 4.2 out of 5.0 on post-course survey evaluations assessing the clarity, usability, and job relevance of the new Epic training materials.	Leading indicators (collected during/immediately after training): - Attendance and completion rates for scheduled sessions - Real-time engagement signals (poll responses, chat participation, questions asked) - Post-session relevance rating ("this applies to my daily workflow")	Lagging indicators (confirm Level 1 held up over time): - Voluntary attendance at optional follow-up or refresher sessions - Requests for job aids or additional support in the two weeks after training

Kirkpatrick Level Matrix For Epic Training

Level/ Measurable Goal	How to Measure (Options)
Level 4: Results (Organizational Impact) Reduce post-upgrade Electronic Health Record (EHR) charting error rates by 15% and decrease average patient encounter documentation time by 2 minutes within 90 days post-go-live. Reduce documentation time per patient encounter by 10% within 6 months of upgrade go-live.	• EHR Error & Help Desk Tracking: Monitor post-go-live help desk ticket volumes and automated error logs related to specific updated Epic workflows. Number of Epic-related support requests after go-live. • Efficiency & Financial Metrics: Track pre- vs. post-training overtime costs or patient throughput rates (e.g., average time per patient visit) following the upgrade. Include patient satisfaction scores related to care coordination. • Compliance & Patient Safety Indicators: Measure compliance failure rates during clinical quality audits or patient safety incident reports linked to documentation errors. • Clinical efficiency data from Epic reports: Determine average documentation time per patient encounter.
Level 3: Behavior (Job Application & Transfer) 90% of clinical staff demonstrate full adherence to updated Epic workflow protocols during post-training performance audits and peer observations 30 days post-rollout.	• Observational Workflow Audits: Conduct direct manager or peer evaluations using structured checklists to monitor real-time system usage on the floor. • System Usage & Log Analytics: Analyze back-end EHR system metadata to evaluate individual time spent per chart, feature adoption rates, and process shortcut utilization. • Self-Reported Application Logs: Have staff maintain weekly self-evaluations or reflection logs tracking their confidence and frequency in executing new Epic workflows. Review workflow audits for number of encounters after the upgrade. • Job Aid Access Tracking: Which job aids were used. Track declining dependency over time.
Level 2: Learning (Skill & Knowledge Acquisition) 95% of learners achieve a passing score of 85% or higher on the practical, scenario-based Epic system simulation assessment on their first attempt.	• System Simulation Assessments: Administer practical, scenario-based sandbox exams in Epic to evaluate core tasks under simulated real-world conditions. • Pre- and Post-Knowledge Quizzes: Compare baseline scores on system updates against post-training comprehension assessments to quantify knowledge gain. • Confidence Surveys: Self-reported confidence ratings on using new Epic Features
Level 1: Reaction (Learner Engagement & Satisfaction) Achieve an average score of 4.2 out of 5.0 on post-course survey evaluations assessing the clarity, usability, and job relevance of the new Epic training materials.	• Post-Course Surveys: Administer immediate post-training surveys using Likert scales to measure perceived course clarity, materials usability, and trainer effectiveness. • In-App Micro-Polls: Implement embedded 1- to 2-question pulse checks directly after completing key interactive modules. • Focus Groups & Facilitated Debriefs: Conduct post-class focus groups with representative clinical staff to gather qualitative feedback on training friction points.

Metrics to Track – Levels 4 & 3

Level	How to Measure	Target Metric (Examples)
4	EHR Error & Help Desk Tracking: Monitor post-go-live help desk ticket volumes and automated error logs related to specific updated Epic workflows. Number of Epic-related support requests after go-live.	• Reduce by 25% within 90 days
4	Efficiency & Financial Metrics: Track pre- vs. post-training overtime costs or patient throughput rates (e.g., average time per patient visit) following the upgrade. Include patient satisfaction scores related to care coordination.	• Increase by 5% within 6 months
4	Compliance & Patient Safety Indicators: Measure compliance failure rates during clinical quality audits or patient safety incident reports linked to documentation errors.	• Improve from 85% to 95%
4	Clinical efficiency data from Epic reports: Determine average documentation time per patient encounter.	• Reduce by 10% within 6 months
3	Observational Workflow Audits: Conduct direct manager or peer evaluations using structured checklists to monitor real-time system usage on the floor.	• 90% compliance
3	System Usage & Log Analytics: Analyze back-end EHR system metadata to evaluate individual time spent per chart, feature adoption rates, and process shortcut utilization.	• 90% of audited records show adoption
3	Self-Reported Application Logs: Have staff maintain weekly self-evaluations or reflection logs tracking their confidence and frequency in executing new Epic workflows. Review workflow audits for number of encounters after the upgrade.	• Reporting 85% proficiency
3	Job Aid Access Tracking: Which job aids were used. Track declining dependency over time.	• Show declining dependency of job aids over time

Metrics to Track –Levels 2 & 1

Level	How to Measure	Target Metric (Examples)
2	System Simulation Assessments: Administer practical, scenario-based sandbox exams in Epic to evaluate core tasks under simulated real-world conditions.	95% score 85% or higher
2	Pre- and Post-Knowledge Quizzes: Compare baseline scores on system updates against post-training comprehension assessments to quantify knowledge gain.	100 complete at 95% score or higher
2	Confidence Surveys: Self-reported confidence ratings on using new Epic Features	Average rating of 4 out of 5
1	Post-Course Surveys: Administer immediate post-training surveys using Likert scales to measure perceived course clarity, materials usability, and trainer effectiveness.	90% report favorable rating of training
1	In-App Micro-Polls: Implement embedded 1- to 2-question pulse checks directly after completing key interactive modules.	Consistent score of >4
1	Focus Groups & Facilitated Debriefs: Conduct post-class focus groups with representative clinical staff to gather qualitative feedback on training friction points.	Themes include usefulness of training and applicability, and majority of comments are positive.