Key Findings from Evaluation of The Career Foundation's Path to Customer Success

Future Skills Centre

MALATEST

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Future Skills Centre
Centre des **Compétences futures**

Canada

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Project Need

Needs
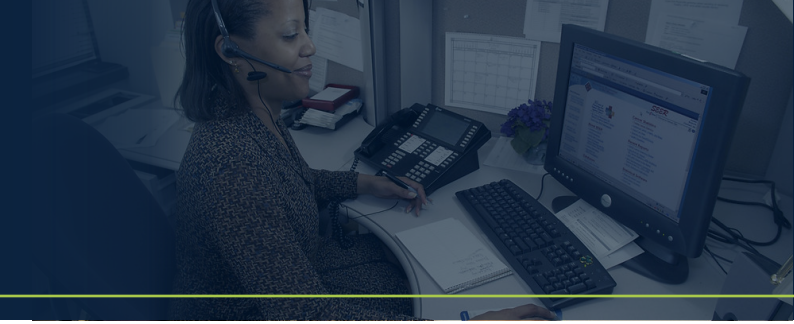
Identified needs:

- **Address job losses suffered by women due to COVID-19**

- **Increase resiliency of women's careers to ensure economic inclusion**

- **Address the demand for individuals with service skills and technical expertise**

Path to Customer Success (Path2CS) provides:

- Training on soft skills, remote work, customer success sales, sales software, data analysis and visualization

- Experiential learning opportunities with companies

- Support on resume development, interview preparation, and identifying job opportunities

- Wrap around supports to help overcome employment barriers and access training

Delivery Model

Application process and interview to determine eligibility and supports needed

Training included
- career resiliency
- remote worker certification
- consultative sales
- customer success & data analytics

Remote work-based experiential learning

Mentorship, employment placement and retention support
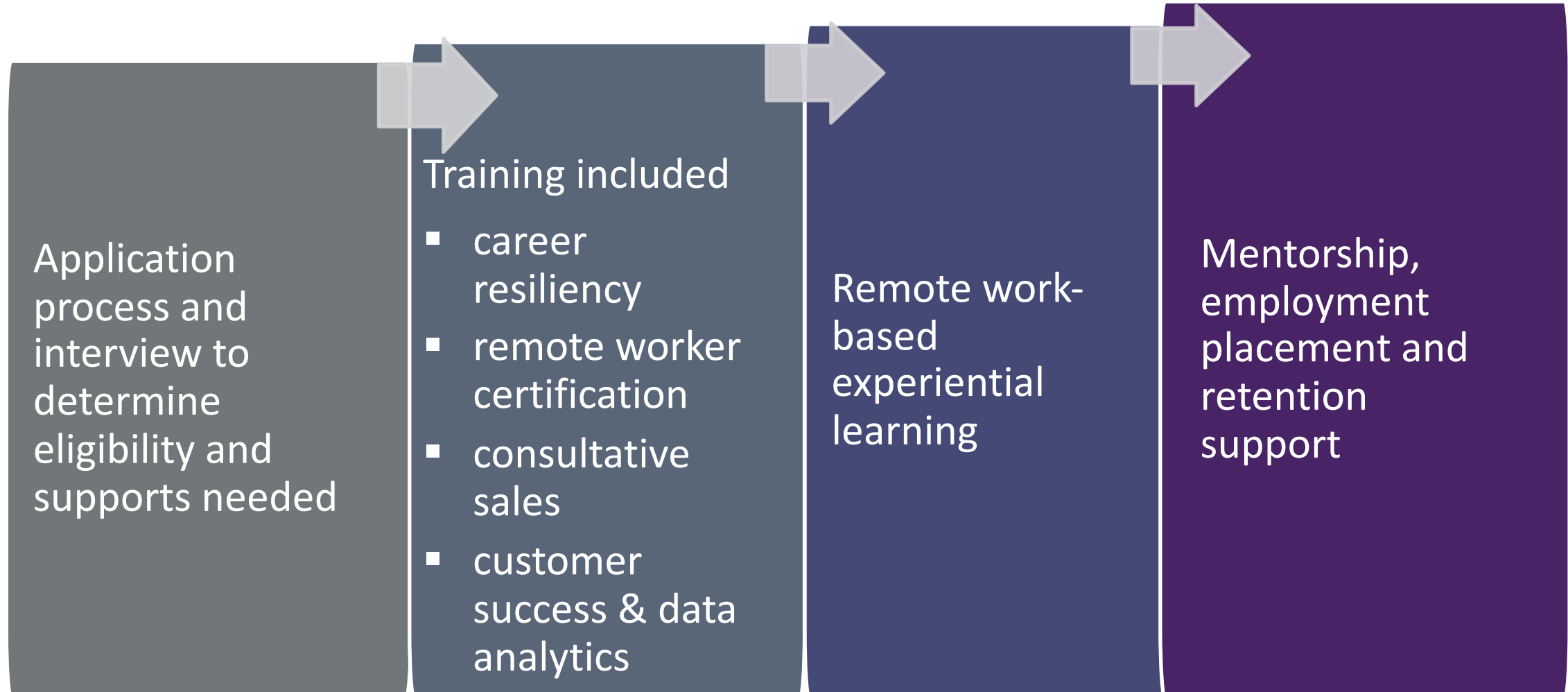
Resources

Several partners were involved in delivering the Path2CS program:

| **The Career Foundation:** delivered career resiliency and mindset training, provided wrap around and post-program supports | **Workplace-less** delivered remote worker training | **Canadian Professional Sales Association** delivered consultative sales training | **Lighthouse Labs** delivered customer success and data analytics training | **Riipen** delivered remote work-based learning | **Employer partners** provided experiential learning sessions and hired program graduates |

Objectives, Activities and Outcomes

For Participants

Objectives:

1. Help women develop sales, data analytics and customer success skills to enter the IT sector where they can further develop technology skills
2. Develop remote employment opportunities for women as a safe and sustainable path to economic inclusion

Activities:

- 12 weeks of skills training, including earning 3 micro-credentials
- Wraparound supports including daycare support, transportation
- 12 weeks of mentorship
- 4 weeks of experiential learning
- 12 months of retention support post-program

Immediate Outcomes:

- Target of 120 women enter program*
- 90% will complete all skills training components
- 80% placed into remote employment in the tech sector
- 90% will report satisfaction with the program

Intermediate Outcomes:

- 80% of those who found employment will retain employment after 1 year

Objectives, Activities and Outcomes

For Employers

Objectives:

1. Create a talent pipeline for employers who need help to rebuild their businesses by predicting customer activities and furthering customer acquisition and retention

Activities:

- Engaged employers to determine needs
- Encouraged employers to offer mentorship, experiential learning opportunities and employ program graduates

Outcomes:

- 90% report satisfaction with hires
- 90% report satisfaction with overall services offered through the program

Assumptions

- Women will view working from home as a more desirable option than being unemployed
- Women will be able to balance flexible and remote work with additional care responsibilities in the household
- Providing women with skills enhancements and creating a path to transition them into the tech sector will increase their interest in IT
- Tech employers are interested in gender diversity and will agree to formalize flexible and remote work arrangements

Evaluation Methodology

Methodology

The Career Foundation:

- Intake surveys with participants assess eligibility and supports needed
- Surveys with participants to assess satisfaction with training (n=22)
- Participant (n=9) and employer (n=9) exit surveys to assess program satisfaction and employment status
- Follow up surveys with participants 3 months post-program (n=14)

Malatest:

- Reviewed reports prepared by The Career Foundation for FSC
- One interview with two Career Foundation staff
- Interviews with network partners (n=3)
- Interviews and focus groups with program participants (n=5)

Limitations

Evaluation results should be viewed considering the following:

- Limited primary data
- Restrictions on contacting employers
- Lack of a comparison group
- Lack of generalizability
- Selection bias

Evaluation Results

Implementation

Challenges in program implementation were addressed by making the following **adjustments**:

Included **Excel assessment** in application process to gauge participants aptitude with data	Offered **Work placement Q&A session** to help participants secure employment that aligned with their goals	Formed an **Advisory Committee** to provide feedback and help improve employment success	Added **technical training** to increase participant skills and marketability	Added **1-on-1 meetings** with employment specialists to identify optimal work environment

Findings

Objective 1:
Help women develop sales, data analytics and customer success skills to enter the IT sector where they can further develop technology skills

- 111 women completed training in remote work, sales and data analytics (87% graduation rate)
- Encouraged participants to form study groups to ensure success
- Added digital skills and Salesforce software training to increase participant skills and marketability

Findings

Objective 2:
Develop remote employment opportunities for women as a safe and sustainable path to economic inclusion

- Prioritized promoting and supporting remote work opportunities with employers
- Employer led information sessions for participants early in program
- Provided 1-on-1 employment support

Findings

Objective 3:
Create a talent pipeline for employers who need help to rebuild their businesses by predicting customer activities and furthering customer acquisition and retention

- Developed relationships with variety of employers to provide employment opportunities

- Convened an advisory group to obtain employer feedback on training and skills needs

Participant Outcomes

Two of three immediate outcomes were met, and intermediate outcome was met for cohorts 1 and 2:

✔

128 entered program

87% graduation rate

✔

81% employed

✔

83% employed 1-year post-program

Participant Satisfaction

Evidence suggests participants were satisfied with Path2CS training, exceeding 90% target for satisfaction with program based on skills learned and instructor knowledge

58 of 63 respondents (92%) indicated the Path2CS facilitated skill development that met or exceeded their expectations

54 of 63 respondents (86%) indicated there was a good balance between theory and activities

61 of 63 respondents (97%) indicated the instructors' knowledge met or exceeded their expectations

63 of 128 participants responded to post-training survey

Employer Outcomes

There is some evidence to suggest employer outcomes were met; however, employer data was limited *

90% report satisfaction with hires

90% report satisfaction with services offered through the program

Employer Satisfaction

Evidence suggests some employers were satisfied with Path2CS graduates and the services offered through the program

* Only n=9 employers responded to the survey

8 of 9 employers indicated the Path2CS work placement matching met or exceeded their expectations

9 of 9 employers would recommend the Path2CS program to other companies

9 of 9 employers indicated the support provided by the Path2CS team met or exceeded their expectations

Efficiency

The Career Foundation efficiently delivered the Path2CS program:

- Added courses to increase participants' skills in Salesforce software and SQL databases to make them more competitive with experienced individuals looking for the same jobs
- Increased outreach activities to develop employer partners and support experiential learning and increase employment opportunities
- Evaluator was unable to identify the cost per participant for the training provided.

Causal Attribution

Employment outcomes among graduates could be causally attributed to the Path2CS program

- 81% found employment; compared to 72% of participants in a similar program (Work Fairly) offered by The Career Foundation

Implications & Recommendations

Expansion

What worked:

- Program was oversubscribed suggesting that program could be expanded; 2,142 applied, 128 were accepted, high program completion rate

What did not work

- Funding was not renewed past March 2023 to enable program to continue or be expanded to other areas of the province or to other provinces

How to improve:

- Develop a strategic plan to secure funding partners and buy-in from employers
- Build in better monitoring and reporting system, especially for employers

Adoption

Several elements of Path2CS were adopted for The Career Foundation's Work Fairly program

Path2CS

Program for women in Ontario

12 weeks training in remote work in customer success roles including sales, data and analytics training

Opportunity to earn 3 micro-credentials

Wrap around and employment supports

Recruited employer partners to provide hands on learning and employment opportunities

Work Fairly

Program for women in Ontario and B.C.

14 weeks training in remote or hybrid tech careers including sales, data and analytics training

Opportunity to earn micro-credentials

Wrap around and employment supports

Recruited employer partners to provide hands on learning and employment opportunities

Partnership

What worked:

- Engaged over 250 companies to promote the program and encouraged employers to provide experiential learning and opportunities for employment

What did not work

- Many small and mid-sized employers did not fully understand the role of customer success or did not have the capacity to develop a customer success role or department in their company

How to improve:

- Engage employers in program design to ensure a common understanding of the customer success role, how it could meet employer needs and develop stronger commitments for employment opportunities

Service Delivery Lessons

What worked

- Developed relationships with organizations to provide wraparound supports and deliver training
- Engaged employers to provide experiential learning and opportunities for employment
- Convened an Advisory Committee of employers for input on skills gaps and sourcing employment opportunities
- Added courses to increase participants' technical skills
- Provided coaching to support participants through training and finding employment
- Measured the results of their program's activities and objectives

Service Delivery Lessons

How to improve:

- Build in better monitoring and reporting system, especially for employers

- Assess the longer-term effectiveness of the program

- Establish a baseline to compare results over time and better assess ultimate program goals

For FSC & Other Funders

Consider building scalability indicators into funding policies and evaluation activities:

- Aligning funding and evaluation with policies that support innovation can help attract funding for future programs that serve marginalized populations

Encourage projects to better plan tracking and collecting of program metrics:

- Provide a detailed plan for tracking metrics pre, post and during program, including employer metrics
- Develop third-party agreements for program evaluation
- Involve third party evaluators throughout program
- Include non-participants in research to gather counterfactual data
- Benchmark results across similar programs

Summary

The evaluation demonstrated Path2CS's:

- Flexibility – provided consistent but adaptable wrap around supports and services to address participants' different contexts and changing circumstances

- Service quality – built strategic partnerships to enhance program delivery and employment opportunities

- Adoptability – elements of Path2CS were adopted for the Work Fairly program

Summary Continued

However, more could be done to:

- Define a common understanding of customer success and encourage smaller employers to create such roles in their organizations

- Involve employers earlier in the design of the Path2CS program to ensure that the needs of a variety of employers were addressed by the program

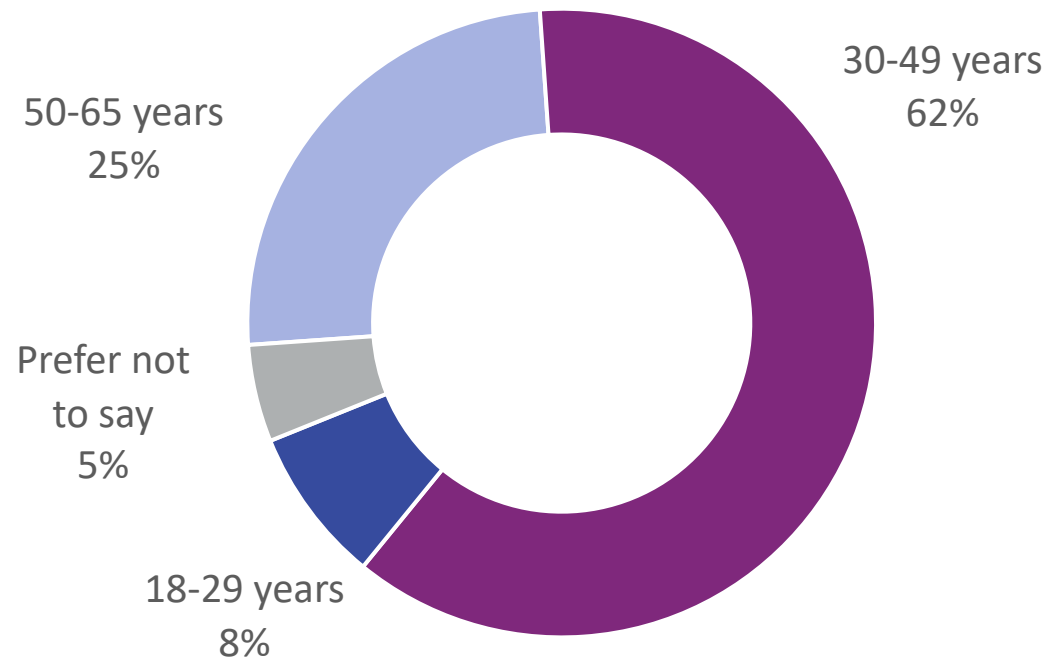- Provide additional monitoring of employer metrics pre, post and during program
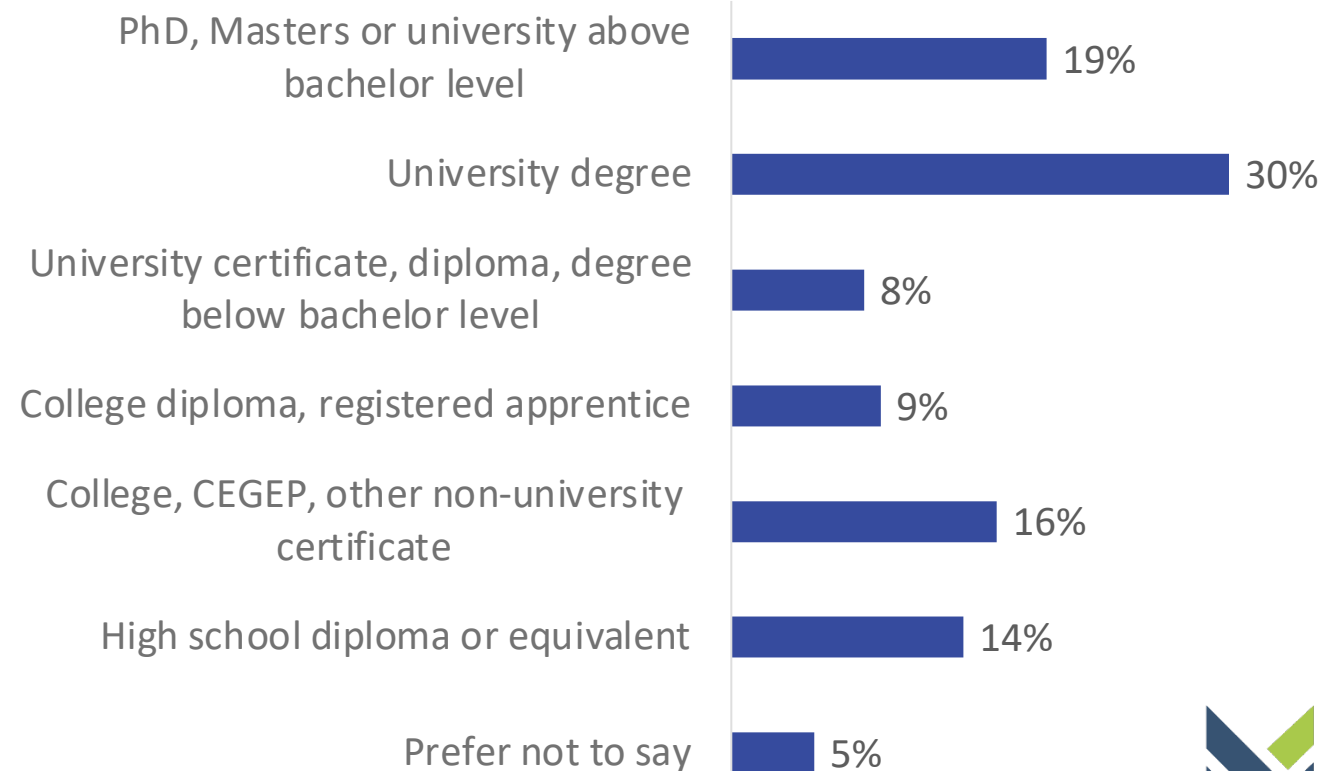
Appendix

Participant Profile

Majority of participants identified as a visible minority (70%), were 30 to 49 years old (62%), close to half (49%) were highly educated

30-49 years
62%

50-65 years
25%

Prefer not
to say
5%

18-29 years
8%

n=128

PhD, Masters or university above bachelor level — 19%

University degree — 30%

University certificate, diploma, degree below bachelor level — 8%

College diploma, registered apprentice — 9%

College, CEGEP, other non-university certificate — 16%

High school diploma or equivalent — 14%

Prefer not to say — 5%

Participant Comments

Participants provided comments on the Path2CS program...

"Thank you for this awesome opportunity, this program was just what I needed To change careers. You have all been such amazing supports."

"Very grateful for this course for helping me find a new job!"

"Success of future participation in the program can increase if more participants can be able to secure jobs in the relevant field."

"I wish they offer more programs like this which will help in continuously improving your skill set for future opportunities."

"The course was very informative although it was a lot of information to absorb in such a short time it was worth it"

"Path for Customer success is good program, but employers are still looking mostly for experience. This is the biggest problem with no solution until now."

Employer Comments

Employers provided comments on the Path2CS program...

"It is not easy to find women who want to get into a technical company regardless of the role. Having the ability to give women who are interested a chance to join us has made our ability to be a more diverse organization a lot easier."

"It has been fantastic to work with the team at The Career Foundation - having 3 wonderful candidates on our team just goes to show how great the impact can be of working with The Career Foundation."

"The candidate is still working for us, and we appreciate her very much."