

Are you Driving Business Value or Simply Entertaining?

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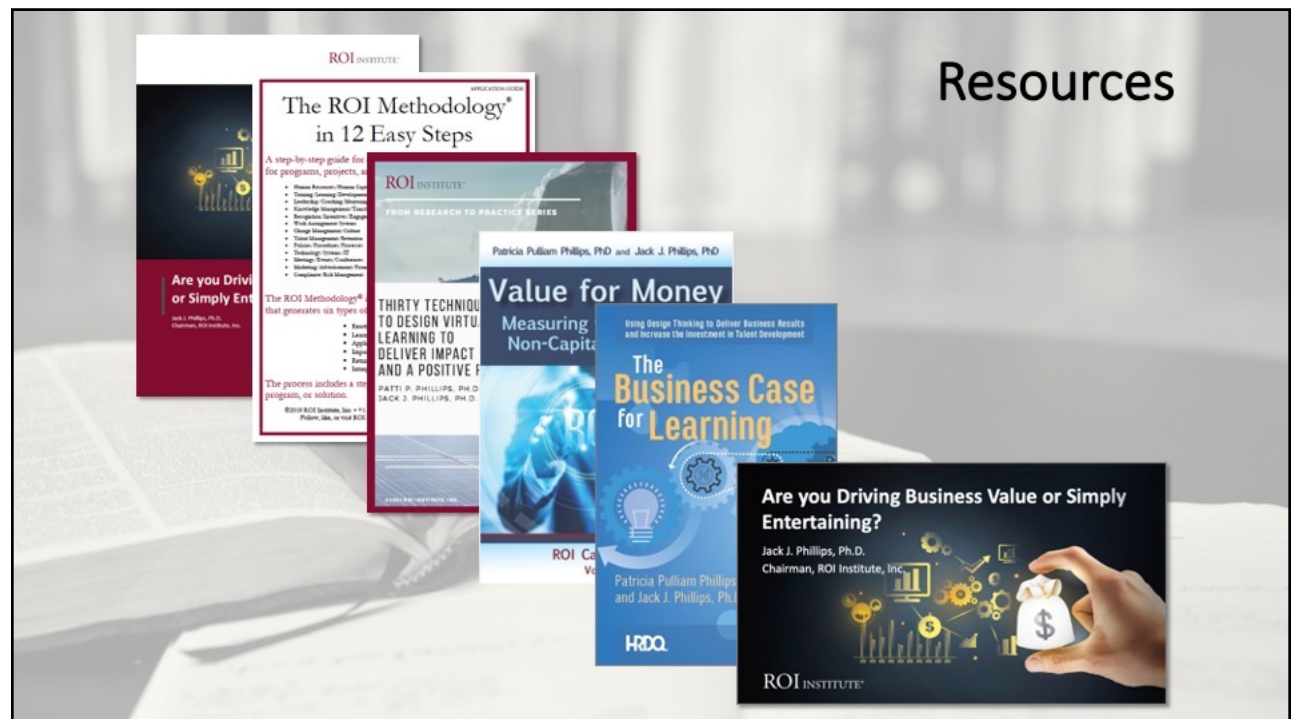
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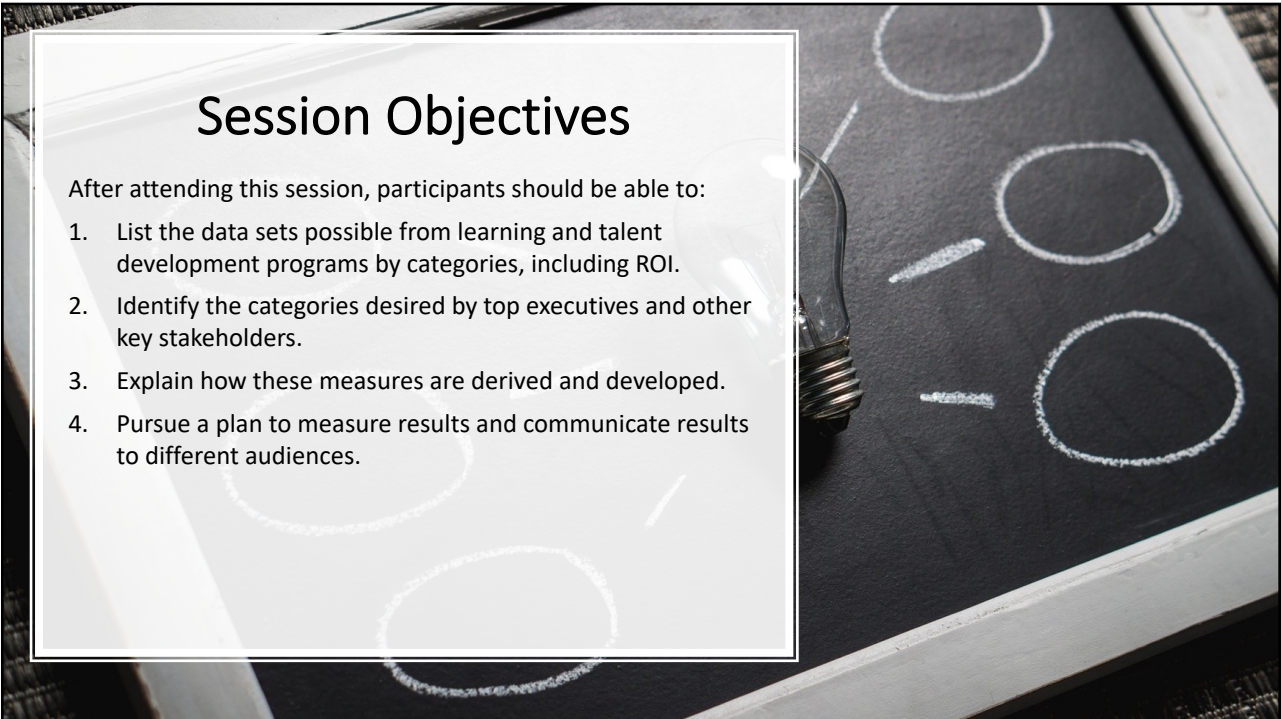


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Resources



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Session Objectives

After attending this session, participants should be able to:

1. List the data sets possible from learning and talent development programs by categories, including ROI.
2. Identify the categories desired by top executives and other key stakeholders.
3. Explain how these measures are derived and developed.
4. Pursue a plan to measure results and communicate results to different audiences.

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Rapid Fire Chat: Serious Performance Challenges

**True
or
False?**

1. Most learning and development is wasted (not used).
2. The learning outcome desired by executives in client organizations is rarely measured.
3. Most learning providers do not have data showing that they make a difference in the organization.
4. Most executives see learning as a cost and not an investment.
5. Most executives view hard skills more valuable than soft skills.

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Rapid Fire Chat: Serious Performance Challenges

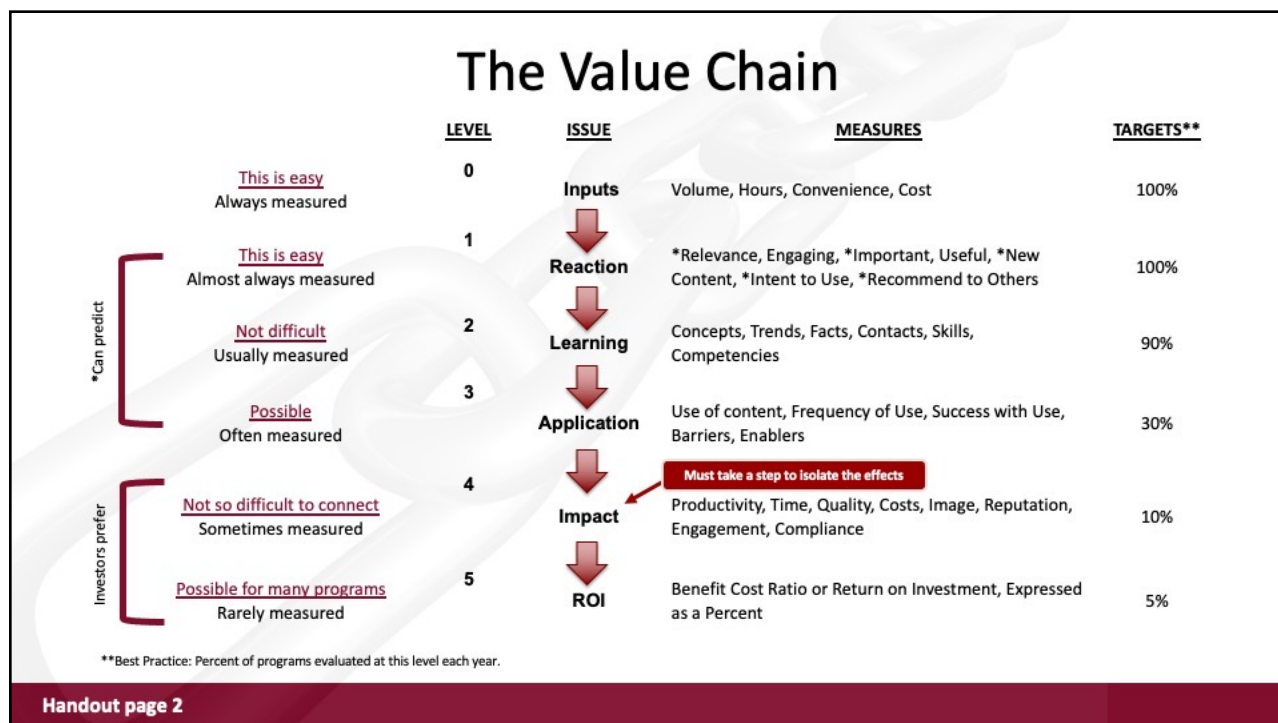
**True
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1. Most learning and development is wasted (not measured).
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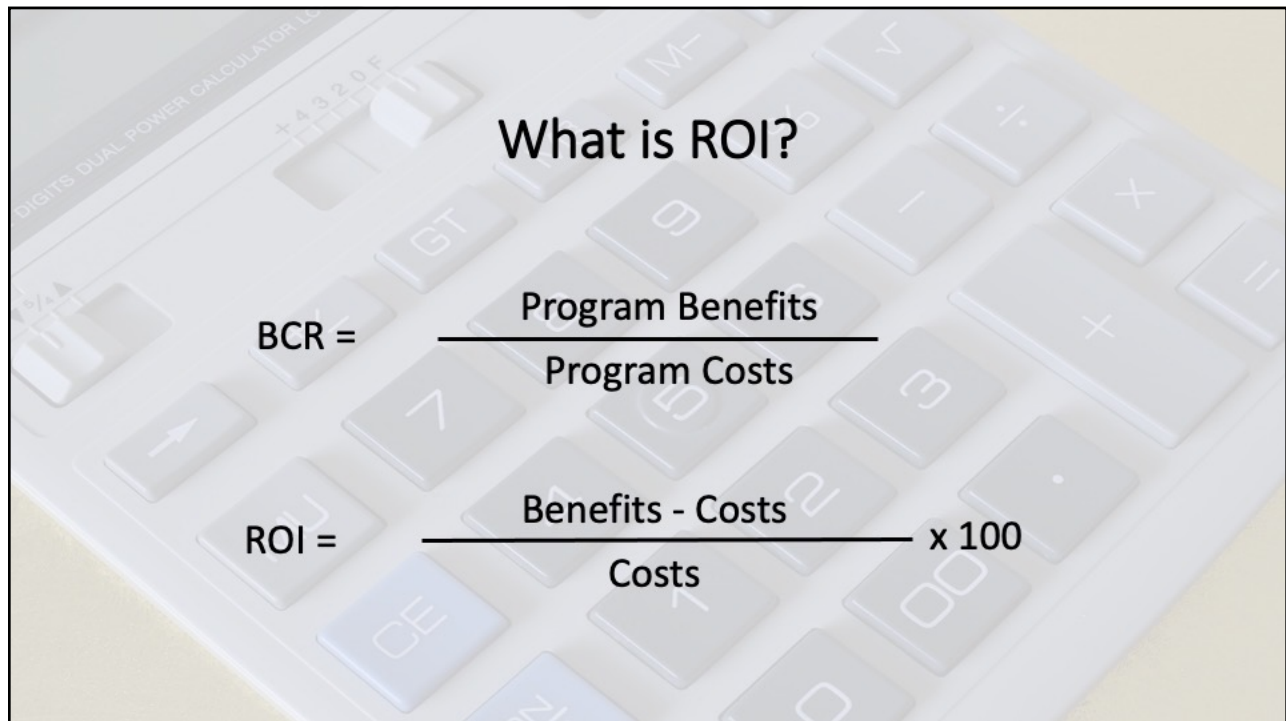
It's much worse for virtual.

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ROI Calculation Example

Program: Inclusive Leadership
Program Benefits = \$762,393
Program Costs = \$387,708

Rapid Fire Chat: What is the ROI?

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Which ONE best describes the business you are in?

- A. Serve the largest number of people with the least amount of disruption and cost.
- B. Participants are engaged, enjoy the programs, and see their experience as valuable.
- C. Participants are learning the content, information, and skills to make this program successful.
- D. Participants take action, use the content, and make important changes.
- E. Participants are driving important impact measures and having an impact in their work, community, or organization.
- F. Participants and the organization have a positive return on the investment of their time and the resources for this program.

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Data-Driven Business Decisions

Post-program exercise.

- Is this a data-driven business decision?
- What level of data is this?

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Universities are Funded on Impact

Traditional (Usually levels 0, 1, 2)

- Enrollment
- Number of courses taken
- Grades
- Diversity of programs
- Quality of faculty
- Investment in facilities
- Student activities
- Student satisfaction based on experience
- Reputation of university

Emerging (Usually levels 3, 4, 5)

- Graduation rates
- Time to graduate
- Placement rates
- Student success
- Real work experiences
- ROI in degree programs
- Student debt load
- Student career satisfaction
- Donations

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Even the entertainment
industry wants action
and impact.

- Today
- The Nate Berkus Show
- The Queen's Gambit
- Shall We Dance?
- Secret Window



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What CEOs Want

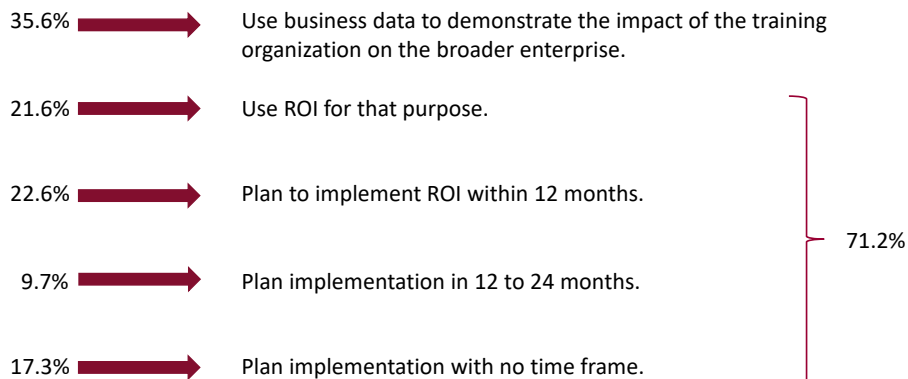
Measures	Currently Measure	Should Measure	Importance
Inputs and Indicators	94%	86%	6
Efficiency	78%	82%	7
Reaction	53%	22%	8
Learning	32%	28%	5
Application	11%	61%	4
Impact	8%	96%	1
ROI	4%	74%	2
Awards	40%	44%	3

ROI Institute and ATD research show that the data CEOs receive are not demonstrating what they want out of their talent investment. (N=96)

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CLOs Use or Plan to Use ROI



(N=335)

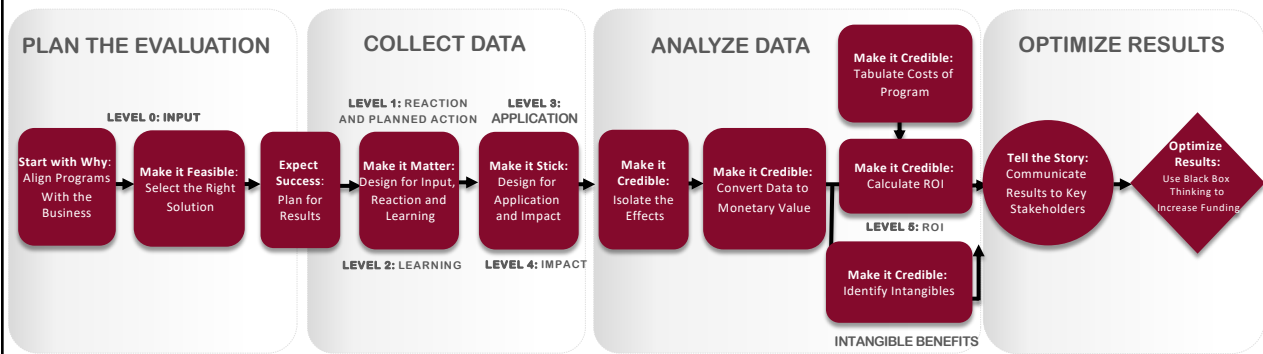
2015 Measurement and Metrics Study by CLO Magazine

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The ROI Methodology Process Model

Designing for the Delivery of Business Results



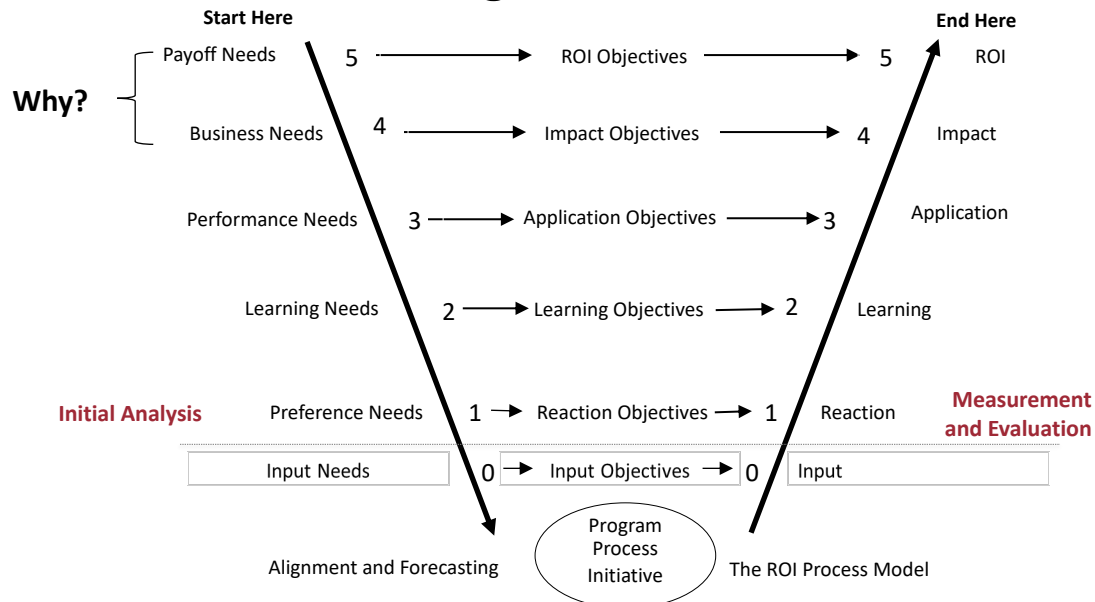
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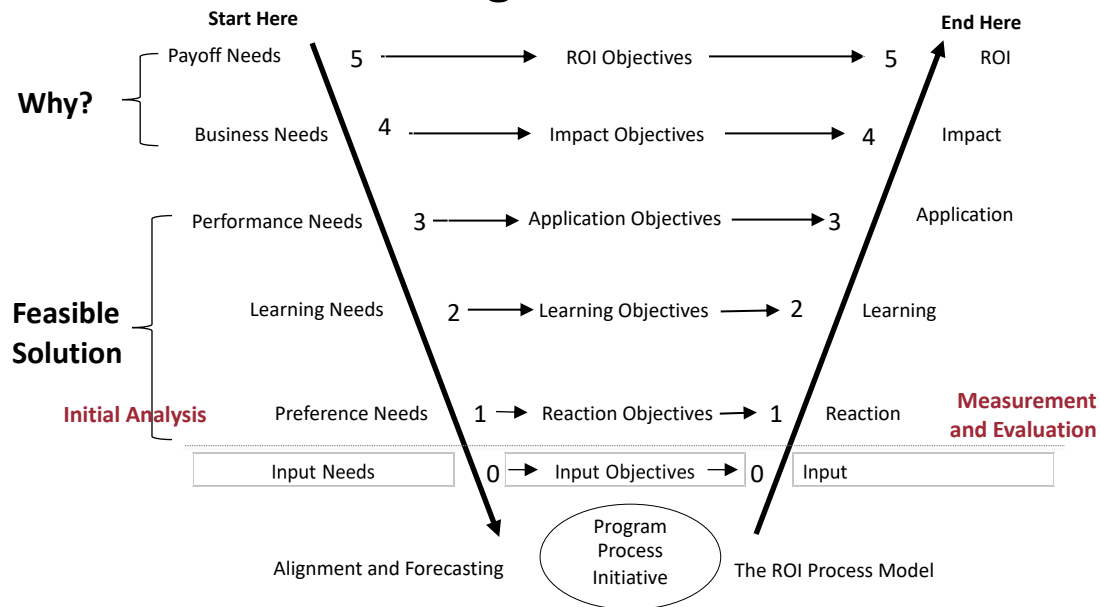
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Alignment Model



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Alignment Model



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Developing Objectives for Each Level

Levels	Focus
Level 1, Reaction	Defines specific measures of expected reaction to the program as it is revealed and communicated to the stakeholders
Level 2, Learning	Defines specific measures of improvement in knowledge, information, contacts, and skills as the participants and other stakeholders learn how to make the program successful
Level 3, Application	Defines specific measures of actions taken that define success with application and implementation of program
Level 4, Impact	Defines the specific impact measures that will change or improve as a consequence of the program's implementation
Level 5, ROI	Defines the minimum return on investment from the program, comparing program costs with monetary benefits from the program

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Evaluation Levels with Objectives

After completing this program or project, participants should:	Evaluation Level
1. Decrease citizen complaints by 20% in one year.	
2. Use problem-solving skills to uncover causes of problems.	
3. Be able to demonstrate the five steps to determine if there is a food security issue.	
4. Rate the facilitator 4 out of 5 on presentation skills.	
5. Decrease the amount of time required to develop a proposal by 25%.	
6. Achieve a 20% ROI one year after program implementation.	
7. Perceive the content to be relevant to actual situations (4.5 out of 5).	
8. Decrease security breaches by 25% in six months.	
9. Conduct a proper investigation using the seven-step process in 95% of complaint situations.	
10. Score an average of 75 or better on new strategy quiz.	
11. Complete a conflict-of-interest questionnaire each year as part of the new ethics policy.	
12. Use all ten negotiation skills in at least 50% of negotiation situations.	

- 1 Reaction
- 2 Learning
- 3 Application
- 4 Impact
- 5 ROI

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Evaluation Levels with Objectives

After completing this program or project, participants should:	Evaluation Level
1. Decrease citizen complaints by 20% in one year.	4
2. Use problem-solving skills to uncover causes of problems.	3
3. Be able to demonstrate the five steps to determine if there is a food security issue.	2
4. Rate the facilitator 4 out of 5 on presentation skills.	1
5. Decrease the amount of time required to develop a proposal by 25%.	4
6. Achieve a 20% ROI one year after program implementation.	5
7. Perceive the content to be relevant to actual situations (4.5 out of 5).	1
8. Decrease security breaches by 25% in six months.	4
9. Conduct a proper investigation using the seven-step process in 95% of complaint situations.	3
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- 1 Reaction
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- 4 Impact
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What percent of your programs are evaluated at the impact level per year?

- A. None
- B. About 5%
- C. About 10%
- D. About 15%
- E. More than 20%



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Measurement Targets

	Level	Recommended % of Programs	**Benchmarking %
0	Input	100%	100%
1	Reaction	100%	80%
2	Learning	80-90%	70%
3	Application	30%	49%
4	Impact	10%	37%
5	ROI	5%	18%

*Percentage of programs evaluated at each level each year

**Benchmarking 2020

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Characteristics of Programs Suitable for Impact & ROI

Cost of the program

Linkage of program to operational goals and issues

Importance of program to strategic objectives

Top administrator interest in the evaluation

Visibility of the program

Size of target audience

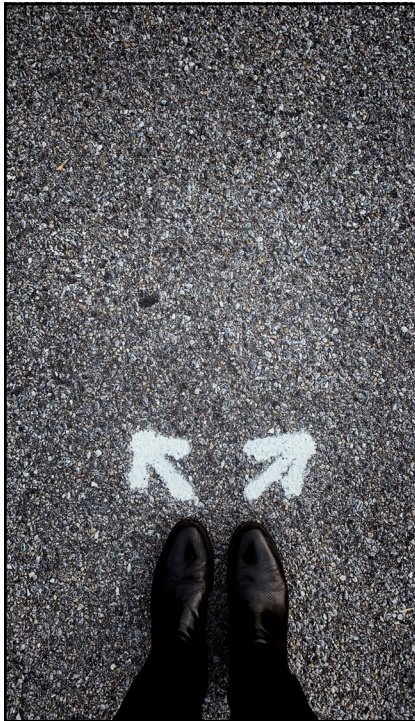
Investment of time required

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The Payoff

- Justify/defend budgets.
- Align projects to business needs.
- Show contributions of selected projects.
- Earn respect of senior management/administrators.
- Build staff morale.
- Improve support for projects.
- Enhance design and implementation processes.
- Identify inefficient projects that need to be redesigned or eliminated.
- Identify successful projects that can be implemented in other areas.
- Earn a “seat at the table”.

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Be Proactive

Remember, when it comes to delivering results:

- Hope is not a strategy.
- Luck is not a factor.
- Doing nothing is not an option.

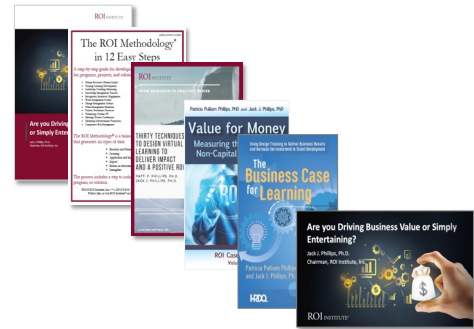
**Change is inevitable.
Progress is optional.**

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Click the link below or scan the QR code to access resources from today's session.

<https://bit.ly/2XDDAfE>



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ROI CERTIFICATION®

SCHEDULED EVENTS

November 8-12, 2021 — Milwaukee, WI

November 8-19, 2021 — Live Virtual

November 29-December 3, 2021 — Savannah, GA

January 10-14, 2022 — Focused on Healthcare

January 17-28, 2022 — Live Virtual

February 28-March 4, 2022 — Orlando, FL

April 11-15, 2022 — New Orleans, LA

May 9-13, 2022 — Orlando, FL

June 13-17, 2022 — Salt Lake City, Utah

July 11-15, 2022 — Williamsburg, VA

July 25-29, 2022 — Denver, CO

August 15-19, 2022 — San Diego, CA

September 12-16, 2022 — Boston, MA

October 10-14, 2022 — Seattle, WA

November 14-18, 2022 — Atlanta, GA

December 5-9, 2022 — Charlotte, NC

WHAT IS ROI CERTIFICATION?

ROI Certification is a globally renowned process focused on measuring the true value of tough-to-measure initiatives using the ROI Methodology®. Participating in ROI Certification is the most comprehensive way to gain the skills needed to evaluate major programs and to report the most credible results that drive organizational improvement.

Email: info@roiinstitute.net

Enroll: <http://bit.ly/ROICertification>

Call: +1 205.678.8101



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ROI Learning Center

Hosted by Training Magazine Network
Created by ROI Institute, Inc.

Four realities occur in today's learning and development environment, globally.

1. Most top executives want learning and development to be aligned with the business.
2. The concept of ROI is familiar to most people.
3. Connecting learning and development to the business is not that difficult.
4. Thousands of L&D professionals are routinely doing this.

The ROI Learning Center provides tools, templates, and case studies to help prepare you for success in today's environment. Our goal is to take the mystery out of the ROI process.

Start at Level 1 and explore each level at your own pace. Each of the five levels will bring you closer to calculating the ROI of your program or project. There is also a calculator to help you calculate ROI when you have the appropriate data.

<https://www.trainingmagnetwork.com/roilearningcenter>



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Level 1 Reaction

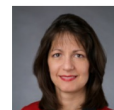
Level 2 Learning

Level 3 Application

Level 4 Impact

Level 5 ROI

ROI Calculator



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Questions?

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