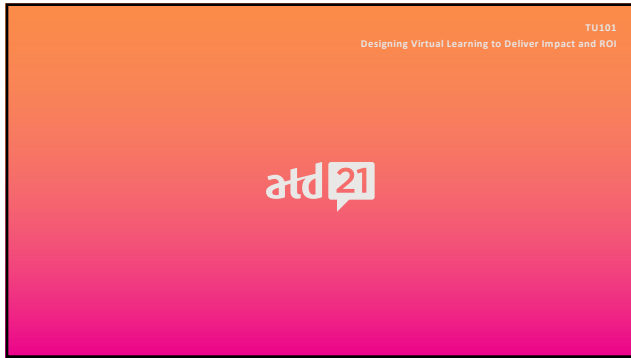
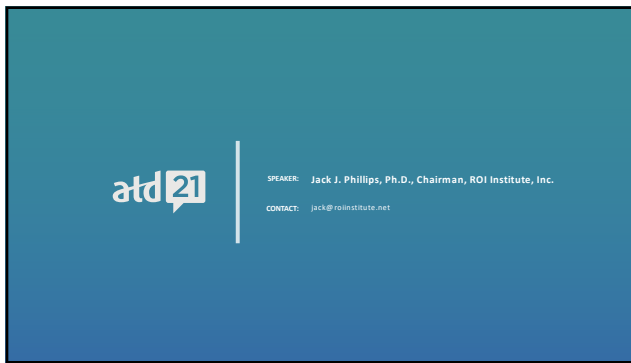




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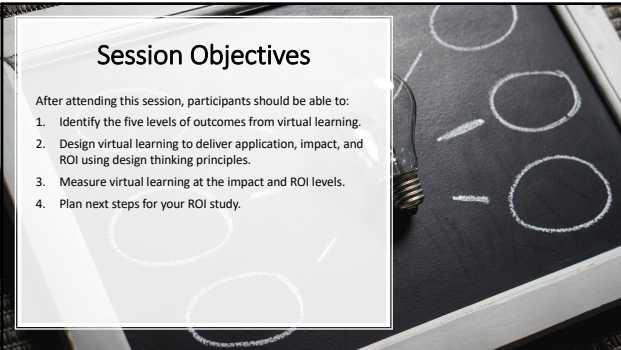
3



Why are you pursuing this subject now? Check all that apply.

- A. Top executives are requiring impact. I must pursue this.
- B. I have pressure to justify my budget. I need to pursue this.
- C. I know I will need to demonstrate more value in the future.
- D. I want to show increased accountability for our expenditures.
- E. I want to experiment with and explore new techniques to measure program success.

4



Session Objectives

After attending this session, participants should be able to:

1. Identify the five levels of outcomes from virtual learning.
2. Design virtual learning to deliver application, impact, and ROI using design thinking principles.
3. Measure virtual learning at the impact and ROI levels.
4. Plan next steps for your ROI study.

5



Serious Performance Challenges

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 as more valuable than soft skills.

True or False?

6

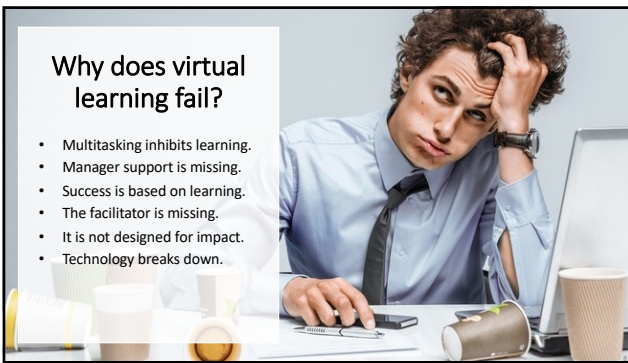


Serious Performance Challenges

1. Most learning and development is wasted (not used).
2. The learning outcome desired by executives in not properly measured.
3. Most learning providers do not know how to measure if they make a difference in the organization.
4. Most executives view learning as a cost, and not an investment.
5. Most executives view hard skills more valuable than soft skills.

It's much worse for virtual.

7



Why does virtual learning fail?

- Multitasking inhibits learning.
- Manager support is missing.
- Success is based on learning.
- The facilitator is missing.
- It is not designed for impact.
- Technology breaks down.

8



The Value Chain Exists Regardless of Program

	LEVEL	ISSUE	MEASURES	TARGETS*
Can predict	0	Inputs	Volume, Hours, Convenience, Cost	100%
	1	Reaction	*Relevance, Engaging, *Important, Useful, *New Content, *Intent to Use, *Recommend to Others (NPS)	100%
	2	Learning	Concepts, Trends, Facts, Contacts, Skills, Competencies	90%
Executive prefer	3	Application	Use of content, Frequency of Use, Success with Use, Barriers, Enablers	30%
	4	Impact	Productivity, Time, Quality, Costs, Image, Reputation, Engagement, Compliance	10%
	5	ROI	Benefit Cost Ratio or Return on Investment, Expressed as a Percent	5%

* Best Practice: Percent of Programs Evaluated at this level each year.

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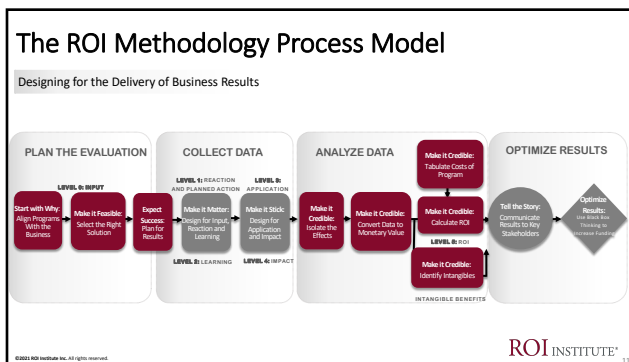
Senior leaders want impact and ROI.

Sixty-seven percent of CEOs say they get at least a basic set of human capital metrics—but **only 24% of survey respondents** said HR also provides analytics that connect their people metrics to business metrics.

Really, the question isn't about relevance of the (HR) function or a 'seat at the table;' rather, it is **what impact has HR made on the business.**

Seventy-four percent of CEOs report that they want ROI, but only 4% get it. Ninety-six percent of CEOs want impact; only 8% receive it now. Business impact data and **ROI are the most important metrics** in their decision making about the learning investment.

10



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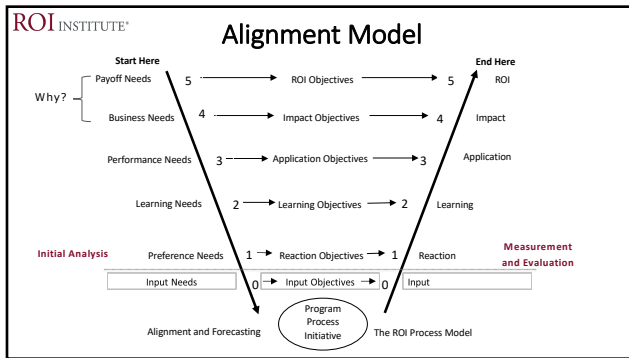
Start with Why

Align Programs with the Business

Design Thinking Principle 1

A problem-solving approach to handle problems on a systems levels

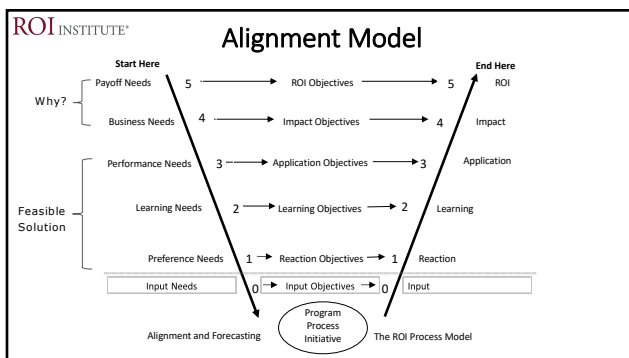
12



13



14



15



Is it connected to the business?

Is it the right solution?

- Examine the data and records.
- Initiate the discussion.
- Reference a case study.
- Use benchmarking from similar solutions.
- Use evaluation as the hook.
- Involve others in the discussion.
- Discuss disasters in other places.
- Use diagnostic tools.

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Have a Discussion and Use Diagnostic Tools

Feasible solutions evolve through the understanding of context, empathizing with the target audience, and identifying performance gaps. The next step is to identify learning needs and how best to deliver relevant information. Forecasting outcomes based on inputs is sometimes helpful.

• Statistical process control • Brainstorming • Problem analysis • Cause-and-effect diagram • Force-field analysis • Mind mapping • Affinity diagrams • Simulations	• Diagnostic instruments • Focus groups • Probing interviews • Job satisfaction surveys • Engagement surveys • Exit interviews • Exit surveys • Nominal group technique
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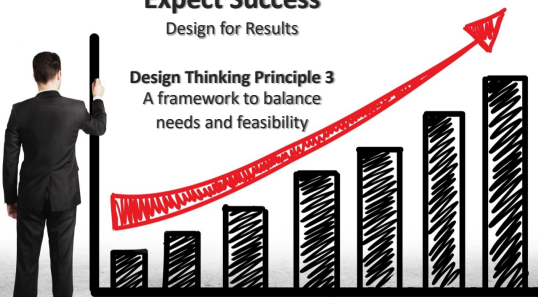


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Expect Success

Design for Results

Design Thinking Principle 3
A framework to balance needs and feasibility



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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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Rules for Objectives

1. Must be measurable and represent minimum acceptable performance.
2. Fewer objectives are better than many objectives.
3. Involve subject-matter experts and key stakeholders.
4. Keep them relevant to the situation, program, and key stakeholders.
5. Create stretch objectives, but make sure they are achievable.
6. Allow for the flexibility to change as conditions change.
7. Failure is OK; process improvement is the key.
8. Objectives are tools for progress, not weapons for performance review.
9. Most objectives should be time-bound.
10. Objectives provide the focus for design, development, implementation, and evaluation.

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Make it Matter

Design for Input, Reaction, and Learning

Design Thinking Principle 4

A way to take on design challenges by applying empathy

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Reaction Objectives

At the end of the program, participants should rate each of the following statements at least a 4 out of 5 on a 5-point scale:

- The program is relevant to my (our) situation.*
- The facilitators/organizers were effective.
- The program is valuable to this mission, cause, or organization.*
- The program is important to my (our) success.*
- The program is motivational for me (us).
- The program is practical.
- The program contained new information.
- The program represented an excellent use of my time.*
- I will recommend the program to others.*
- I will use the concepts and materials from this program.*

*The measures will usually correlate with application.

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Make it Stick

Design for Application and Impact

Design Thinking Principle 5

A culture that fosters exploration and experimentation

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Design for Application and Impact

		Timeframe		
		Before	During	After
Role-Players*	Manager	1	2	3
	Participant	4	5	6
	Facilitator/ Organizer	7	8	9

*Replace role players with whomever is most influential for your program.

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In a typical virtual design project, what percent of the project (time/resources) is devoted to planning/designing for application and impact?

- A. None
- B. 1-5%
- C. 6-10%
- D. 11-20%
- E. 21-30%
- F. More than 30%

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Actions BEFORE the Program



1. Develop application objectives for participants.
2. Have participants develop customized impact objectives.
3. Use performance contracts, a contract for application and impact between facilitator, participant, and manager.
4. Create an application guide to enable and support application.
5. Create a job aid to use in application.
6. Have significant other (manager) create expectations before the program.
7. Make it easy to provide application and impact data.
8. Require application and impact data as a basis for participation.

Thirty Techniques to Design Virtual Learning to Deliver Impact and a Positive ROI

26

Actions DURING the Program



9. Use action plans to detail application steps.
10. Have action plans presented to the group to increase commitment.
11. Teach to application and impact.
12. Review Level 3 and Level 4 follow-up questionnaire in the last learning module.

Thirty Techniques to Design Virtual Learning to Deliver Impact and a Positive ROI

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Technology-Enabled Actions



13. Create coaching videos to use at appropriate times.
14. Use apps to encourage and enable the use of content.
15. Use guided support software to enable application.
16. Use selfies with the customer after the sale.
17. Use Riff Analytics to record quality and dominance of conversations.
18. Use social media groups to network for encouragement, support, and enablement.
19. Post recorded content reviews.
20. Use automated reminders for application and impact.

Thirty Techniques to Design Virtual Learning to Deliver Impact and a Positive ROI

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Actions AFTER the Program



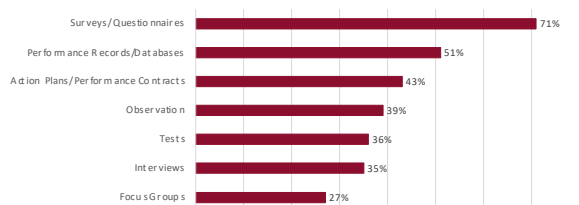
21. Organize a group coaching session after the program.
22. Apply nudging techniques from "Inside the Nudge Unit".
23. Collect action plans in a follow-up period.
24. Organize follow-up sessions to share results.
25. Use an on-the-job trainer to support application.
26. Provide encouragement from the manager (significant other) after the program.
27. Host a lessons-learned meeting after participants have used the content.
28. Share successes with other participants.
29. Hold a contest based on achieving success for application and impact.
30. Use a peer feedback process for on-the-job performance.

What is your favorite method to design for application and impact?

29

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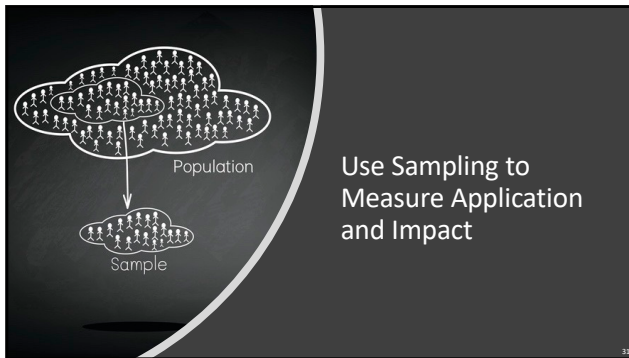
Data Collection Methods



*Survey of Users, N = 246

30

30



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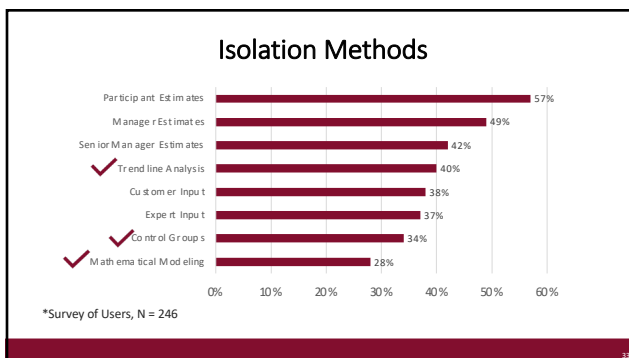
Make it Credible

Measure Results and Calculate ROI

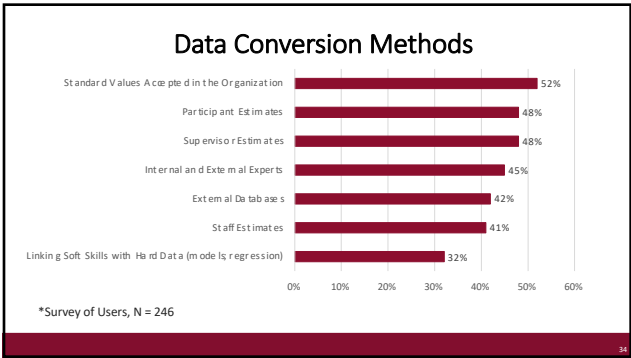
Design Thinking Principle 6
A fixed process and a tool kit

- Isolating the effects of the program
- Converting Impact data to money
- Identifying intangible benefits
- Tabulating cost of the program
- Calculating ROI

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33



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Intangibles

- Adaptability
- Awards
- Brand awareness
- Career minded
- Caring
- Collaboration
- Communication
- Conflicts
- Corporate social responsibility
- Decisiveness
- Engagement

- Image
- Innovation
- Job satisfaction
- Leadership
- Networking
- Organizational climate
- Organizational commitment
- Reputation
- Stress
- Talent
- Teamwork

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Fully-Loaded Costs

“When in doubt, put it in.”
The process should withstand even the closest scrutiny in terms of its credibility.

DIRECT

- ☐ Program Materials
- ☐ Instructor / facilitator
- ☐ Facilities
- ☐ Travel, lodging, meals

INDIRECT

- ☐ Needs Assessment (Prorated)
- ☐ Program Development (Prorated)
- ☐ Participant Time (salaries & benefits)
- ☐ Administrative/overhead
- ☐ Evaluation



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What is ROI?

BCR = $\frac{\$228,000}{\$55,449}$

ROI = $\frac{\$228,000 - \$55,449}{\$55,449} \times 100$

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Tell the Story
Communicate Results to Key Stakeholders

Design Thinking Principle 7
A storytelling process to inspire senior executives

38

Use Process Improvement
Black Box Thinking can Increase Funding

Design Thinking Principle 8
A new competitive logic of business strategy

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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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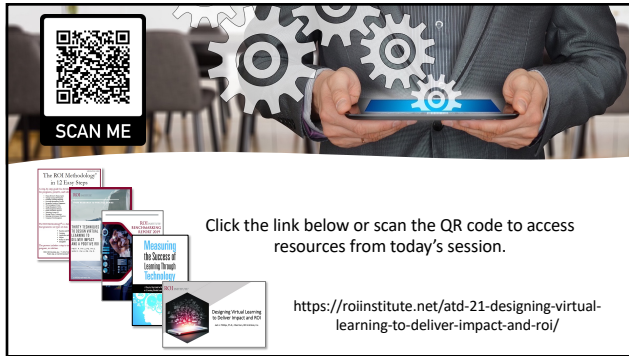
Be Proactive

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://roiinstitute.net/atd-21-designing-virtual-learning-to-deliver-impact-and-roi/>

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SCHEDULED EVENTS

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September 27–October 1, 2021 — New Orleans, LA

October 4-8, 2021 — Atlanta, GA

October 18-22, 2021 — Boston, MA

November 8-12, 2021 — Milwaukee, WI

February 28–March 4, 2022 — Orlando, FL

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