

# Building a Successful ROI Practice

## A Workshop for ROI Implementation

To be successful with ROI requires a combination of skill sets and a determination to make a difference in your community or country. Most of the revenue for a successful practice will come from the consulting side, developing impact and ROI studies for your clients. The second revenue category is teaching ROI, and this involves conducting a variety of workshops and ultimately teaching ROI Certification. These two revenue streams are all supported by three other important skill sets:

1. **Writing about ROI.** Whether you are writing case studies, articles, blogs, or a book, it is important to get the message out to various audiences.
2. **Speaking to a variety of groups.** An important business development process, presentations range from local groups to international conferences.
3. **Researching the status and progress of your practice.** Understanding the extent of assessment, measurement, and evaluation in the function you are pursuing (or the industry/country you are serving) is important.

To make this successful we have developed a very powerful high impact 5-day program designed to build these critical skills. It is essential and necessary for new associates and partners to participate in this workshop. In addition, internal implementers of the ROI methodology will also gain from active participation in this process.

### Consulting

In this workshop, you will explore consulting processes available, ranging from an evaluation strategy session to detailed impact ROI studies. Consulting often has a very high profit margin process and should be representing about 50% or more of your revenue. Participants will leave this session with a plan for consulting with the target audience.

### Teaching ROI

This part of the workshop is a Train-the-Trainer session where individuals will learn how to teach ROI, learning the critical issues and overcoming some of the challenges and issues along the way. Participants will receive a variety of available workbooks and select the workshops they would like to teach and then develop a plan for teaching. Participants will practice teaching the key components of the ROI process. They will each receive a primary reference workshop and facilitation guide to make this that much more feasible and easier to accomplish. We suggest about 30% or more of your revenue or more in this category.

### Writing

A successful ROI practice must be supported by writing and publishing. This involves writing blogs, articles, and briefing papers. It also involves writing case studies and getting them published, and even

writing or coauthoring a book. Ideally, coauthoring a book with ROI institute founders would be an excellent way to make a huge impact with your clients. This part of the workshop teaches what is involved in writing and publishing, various opportunities that are available, and the different ways to make this successful. A writing plan is developed. When books are published, royalties are often paid and some magazines will often pay to write articles. Writing will be a small part of revenue. We suggest a target of about 3-5% of your revenue in this category.

## **Speaking**

To be successful you must speak to groups representing your target audience. A variety of groups are available locally, regionally, nationally, and internationally. Sometimes they are business clubs such as the Kiwanis or Chamber of Commerce. Local chapters of professional groups are another possibility. Regional conferences and national conferences are also available. In this session, we will examine the possibilities and develop a plan. You will be presented with access to a variety of presentations and then map out a plan for speaking to promote ROI. Although most of your speaking will probably be provided for free, you may drive 3-5% of your revenue with this category.

## **Researching**

The old saying “You can’t manage what you can’t measure” applies to our business as well. We need to measure how well our processes are working. Research studies showing the extent of measurement and evaluation for your function and your area is an absolute must. Part of this research is to understand “what should be” versus “what is” on the status. These often define gaps and identify barriers. Together the gaps and barriers present excellent opportunities for business growth. The research could involve a status of measuring evaluation in an industry, profession/field, or even in a country. The key is to use this information to drive your business. It is also valuable to your clients, and in some cases, you could sell it as well. We suggest about 5% of your revenue should be derived from research you make available to your clients.

## **Marketing Strategy**

The workshop ends with how to market ROI using effective marketing and promotion processes that have been developed by the ROI Institute and its partners around the world. A marketing plan is developed to support ROI implementation.

# **Program Details**

## **Action Oriented**

The focus of this workshop is to make things happen and drive the business. Each participant leaves with a consulting plan, training plan, a writing plan, speaking plan, and a research plan. In addition, you will develop a marketing plan for making ROI work. These tools are critical for success. If they are followed properly, the impact will follow with revenue growth, profitability, and market share in your area or country.

## Logistics

This workshop is offered at least once a year at the ROI Institute headquarters in Birmingham, AL, USA. If the demand is there, it will be offered in Europe, the Middle East, Africa, South America, or Asia. The date for the 2019 workshop is: March 4-8, 2019.

## Fee

The fee for this workshop is \$2995.00 and includes breakfast and lunch. Also included will be dozens of books, tips, tools, and proposals. Your satisfaction is guaranteed. If you are not completely satisfied with this program your fee will be fully refunded. At the ROI Institute, we provide the ultimate satisfaction. If you are not completely satisfied with this workshop there is no charge for it.

## Program Outline

### I. Introduction and Expectations

1. Purpose of Workshop
2. The Success Profile
3. Expectations for the Week

### II. Consulting with ROI

1. Consulting Fundamentals
2. Evaluation Strategy Session
3. Conducting ROI Studies – The Range of Options
4. ROI Coaching
5. ROI Review
  - Assessment Instruments
  - Implementation Guides
  - Needs Assessment/Performance Consulting
  - Forecasting ROI
  - Ethics
6. Proposals and Pricing
7. Consulting Plan

### III. Teaching ROI

1. Potential Workshops
2. Teaching Tips
3. Use of Cases
4. Lecture vs. Discussion
5. Storytelling
6. Practice Teaching
7. Teaching Plan

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#### **IV. Writing ROI**

1. Blogs
2. Articles
3. Briefing Papers
4. Case Studies
5. Case Study Publication
6. Books
7. Developing a Book Proposal
8. Publishing Options
9. Writing Tips
10. Writing Plan

#### **V. Speaking on ROI**

1. Short Speeches – Purpose, Duration, and Audience
  - Networking Events
  - Management Meeting
  - Organization
2. Professional Associations
3. Conferences
4. Chapter Meetings
5. National Conferences
6. International Conferences
7. Speaking Plan

#### **VI. Researching ROI**

1. Benchmark Studies
2. Special Functions
3. Industries
4. Customized Projects
5. Research Tools
6. Research Plan

#### **VII. Marketing Approach**

1. Defining your Audience
2. Creating Interest
3. Having a Conversation
4. Webcast, Webinars, Briefings, Social Media Marketing, Flyers, Email Blasts
5. Marketing Plan

## Faculty

This program is taught by Patti Phillips, Jack Phillips, and Tim Brock.

**Patti P. Phillips, Ph.D.**  
**President and CEO**  
**ROI Institute, Inc.**

Dr. Patti Phillips is President and CEO of ROI Institute, Inc., the leading source of ROI competency building, implementation support, networking, and research. She helps organizations implement the ROI Methodology in over 60 countries. Patti serves as Principal Research Fellow for The Conference Board, People Analytics Board Chair for the Institute for Corporate Productivity (i4cp), board member of the Center for Talent Reporting, and ATD CPLP Certification Institute Fellow. Patti also serves on the faculty of the UN System Staff College in Turin, Italy, and The University of Southern Mississippi's PhD in Human Capital Development program. Her work has been featured on CNBC, EuroNews, and over a dozen business journals.

She, along with her husband Jack Phillips, contributes to a variety of journals and has authored many books about measurement and evaluation, ROI, and human capital analytics. Recent publications include, *Investing in Human Capital* (Business Writers Exchange Press, 2017); *The Chief Talent Officer* (Routledge, 2016); *Real World Training Evaluation* (ATD, 2016); *Handbook of Training Evaluation and Measurement Methods, 4th Edition* (Routledge, 2016); *Accountability in Human Resource Management 2nd Edition* (Routledge, 2016); *Measuring the Success of Employee Engagement* (ATD, 2016); *Maximizing the Value of Consulting* (Wiley, 2015); *High-Impact Human Capital Strategy* (Amacom, 2015); *Making Human Capital Analytics Work* (McGraw-Hill, 2015), *Measuring the Success of Leadership Development* (ATD, 2015), *Performance Consulting, 3rd ed.* (Berrett-Koehler, 2015), *Measuring Return on Investment in Environment, Health, and Safety* (Wiley, 2014), *Measuring the Success of Learning through Technology* (ATD, 2014), *Measuring the Success of Sales Training* (ATD, 2013), *Measuring the Success of Organization Development* (ATD, 2013), *Measuring ROI in Healthcare: Tools and Techniques to Measuring Impact and ROI in Healthcare Improvement Projects* (McGraw-Hill, 2013), and *Survey Basics* (ATD, 2013). Patti can be reached at [patti@roiinstitute.net](mailto:patti@roiinstitute.net).

**Jack J. Phillips, Ph.D.**  
**Chairman**  
**ROI Institute, Inc.**

Jack J. Phillips is Chairman of ROI Institute and a world-renowned expert on accountability, measurement, and evaluation. He provides consulting services for Fortune 500 companies and major global organizations. On three occasions, Meeting News named him one of the 25 Most Powerful People in the Meetings and Events Industry, based on his work on ROI. The author or editor of more than 100 books, he conducts workshops and presents at conferences all over the world. Jack has received several awards for his books and work. He has served on the boards of several private businesses, including two NASDAQ companies, and several nonprofits and associations, including the Association for Talent Development and the National Management Association. His work has been featured in The Wall Street Journal, Bloomberg BusinessWeek, Fortune Magazine, and on CNN.

He, along with his wife Patti Phillips, contributes to a variety of journals and has authored many books about measurement and evaluation, ROI, and human capital analytics. Recent publications include, *Investing in Human Capital* (Business Writers Exchange Press, 2017); *The Chief Talent Officer* (Routledge, 2016); *Real World Training Evaluation* (ATD, 2016); *Handbook of Training Evaluation and Measurement Methods*, 4th Edition (Routledge, 2016); *Accountability in Human Resource Management 2nd Edition* (Routledge, 2016); *Measuring the Success of Employee Engagement* (ATD, 2016); *Maximizing the Value of Consulting* (Wiley, 2015); *High-Impact Human Capital Strategy* (Amacom, 2015); *Making Human Capital Analytics Work* (McGraw-Hill, 2015), *Measuring the Success of Leadership Development* (ATD, 2015), *Performance Consulting*, 3rd ed. (Berrett-Koehler, 2015), *Measuring Return on Investment in Environment, Health, and Safety* (Wiley, 2014), *Measuring the Success of Learning through Technology* (ATD, 2014), *Measuring the Success of Sales Training* (ATD, 2013), *Measuring the Success of Organization Development* (ATD, 2013), *Measuring ROI in Healthcare: Tools and Techniques to Measuring Impact and ROI in Healthcare Improvement Projects* (McGraw-Hill, 2013), and *Survey Basics* (ATD, 2013). Jack can be reached at [jack@roiinstitute.net](mailto:jack@roiinstitute.net).

**Timothy R. Brock, Ph.D.**  
**Director of Consulting Services**  
**ROI Institute, Inc.**

Dr. Tim Brock is the Director of Consulting Services for ROI Institute, Inc., the leading source of ROI competency building, implementation support, networking, and research. He helps organizations implement the ROI Methodology in over 60 countries. Tim also serves on the faculty of the UN System Staff College at Turin, Italy, Capella University at Minneapolis, MN, Franklin University at Columbus, Ohio and Webster University at Orlando, Florida. He is also a visiting professor at Villanova University at Nashville, Tennessee. He has been featured on Business RadioX and Your Career with Debbie Featherston television program.

During his Air Force career, Tim was responsible for assessing, measuring, and evaluating the effectiveness of the missile launch officer initial qualification training programs for all five of the USAF's Inter-Continental Ballistic Missile (ICBM) weapon systems. He was also a key team leader for the Air Force's reserve officer commissioning program curriculum redesign that is used at 148 colleges and universities across the country to prepare officer candidates for 21<sup>st</sup> Century leadership responsibilities. While at Lockheed Martin, Tim was the lead human performance systems architect to convert NASA training from a skills-based to a competency-based model for NASA's next generation of extended, deep space exploration missions to the moon and Mars that included the initial training, evaluation, and sustainment program for all managers, mission equipment maintainers, ground and mission controllers, and astronauts. He also served as the lead in-country human performance system architect for a new 911 National Training Center (NTC) for the Kingdom of Saudi Arabia and designed an education and training solution using results-based management, monitoring, and measurement principles that included development of initial and follow-up training for emergency call operating center leadership, staff, and first responders.

Tim's publications include "Training NASA Astronauts for Deep Space Exploration Mission: A Research Study to Develop and Validate a Competency-Based Training Framework" (2007) and *Simulations Operations, Curriculum Integration, and Performance Improvement* in the book "Healthcare Simulation: A Guide for Operations Specialists" (2016). His latest journal article, published by the International Society for Performance Improvement in their *Performance Improvement Journal*, was titled, "Performance Analytics: The Missing Big Data Link Between Learning Analytics and Business Analytics". Tim can be reached at [tim@roiinstitute.net](mailto:tim@roiinstitute.net).