

Subject: Clients Seeking ROI Case Studies

Dear Colleague,

Thank you for the interest in reading an ROI Study related to your particular project. Unless a related study is already published, we may be unable to share these confidential materials with the public, unless we have permission from the authors. Let us explain why we face this dilemma.

Each year we have the pleasure of seeing several hundred case studies through ROI Certification, consulting assignments, and from partners in different countries. In addition, some clients seek our review for their case studies. Because those case studies are the property of our clients, we do not have the permission to send them to anyone else. We certainly don't want to betray the valuable trust that we've established with our customers.

Sometimes, we might make a comment that we have a case study on a particular topic already. With thousands of case studies submitted to us in the last two decades, we probably do have a case study that covers every topic. Unfortunately, this doesn't mean that we have the resources to find it or the permission to share it. We purposely don't organize our case studies in any systematic way where they can be easily located. We file it away by date and person and not by subject or organization. One reason we do that is because we do not want to inadvertently send a case study without permission.

Even if we find the case study, as we sometimes do, we must seek permission to share that with you. Then, we face two problems: 1.) Our contacts may not be there now, and 2.) if we find the appropriate contacts, they often prefer not to share it. They are usually concerned that it might find its way into the public spectrum—which breaches confidentiality.

Many of the ROI certification participants take extreme measures to protect their ROI case study from being seen by others. In some cases, we setup a secure website to accept the case studies.

To date, we have about 400 case studies published in journals, magazines and different books, dating back to 1994, when our first ROI case study book was published. These continue to be important topics for publishers. Every year we publish about 20-30 case studies, and we expect that number will likely increase in subsequent years. These authors have given permission to publish them, and subsequently share their results.

On the positive side, the ROI Methodology works in all professional fields and in any situation. Having a case study exactly suited to your area could actually be dysfunctional. It may narrow your view of possibilities by using the same set of

measurements and the same methods for each step of the process. This may not be best suited for your organization and your particular project. Each project is unique and has unique results. We have concerns about someone duplicating the case study in every detail and this has happened. The key is to take any case study and see how the study was planned, executed, and reported. That is much more constructive.

If you want to discuss your case study, please let us know. We would be happy to discuss how you can evaluate your project. Meanwhile, we hope that you understand our predicament.

Best Regards,

A handwritten signature in black ink that reads "Patti Phillips". The signature is written in a cursive style with a large, prominent "P" at the beginning.

Patti P. Phillips, Ph.D.

A handwritten signature in black ink that reads "Jack J. Phillips". The signature is written in a cursive style with a large, prominent "J" at the beginning.

Jack J. Phillips, Ph.D.