



Measuring ROI in Coaching for Sales Managers

by Kaycee Buckley

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Global Healthcare

PROGRAM BACKGROUND

Global Healthcare is a pioneer in providing innovative ways to monitor a vast range of health conditions. Recently, Global Healthcare launched its next-generation products and services to protect and grow its market share. The sales organization consists of more than 2,000 sales representatives and more than 300 sales managers in 124 countries.

To stay competitive in a complex sales environment, and with the launch of new products to meet the growing demands of its customers and the dynamic challenges in the market, Global Healthcare required the sales force to move to a more solution-oriented selling approach. This new selling approach required the sales organization to work with more stakeholders, help solve for unique business challenges, educate its customers on a rapidly changing market, and show up differently than it had before and from its competitors. With this new selling approach, the business began to see longer sales cycles. This was due to opportunities stalling in the sales process. Sale representatives were either moving through the first stage of the process too quickly, or not gathering the appropriate information and finding themselves needing to go back, with their customer, to the beginning of the selling process. Opportunities were also stalling in certain stages of the sales process due to specific situations in which their sales manager needed to help successfully guide them through the issue.

Along with additional selling skills training, the company realized that this change of behavior and new skills could only be supported and reinforced by the sales managers. Therefore, the senior leaders called upon the learning and development team to create a sales coaching culture by developing and executing a global sales coaching model and cadence to achieve sales results through their people improving sale performance, increasing productivity, and driving for results.

This case was prepared to serve as a basis for discussion rather than as an illustration of either effective or ineffective administrative and management practices. Names, dates, places, and data may have been disguised at the request of the author or organization.

The Analysis

The L&D team surveyed the sales organization along with area training leads to gain insights on how sales managers were coaching, if they were at all. The team discovered that five different “coaching” approaches were being used, derived from external models or developed internally. There was also no standard definition or use of a sales coaching cadence, or process, globally.

The survey also revealed that the organization wanted a coaching model that was clear, easy to use, standardized, consistent globally, and adaptable to any situation, and that allowed for feedback, action, and follow-up with a clear plan and achievable results supported by a global cadence and tools.

The L&D team decided that the internal expertise to build a coaching model and training program that would meet all these objectives did not exist. Therefore, the decision was made to evaluate external vendors specializing in coaching, and score them based on specific sales coaching focus, simplicity, global application, proof of success, delivery method, length of training, coaching tools, and trainer certification.

The survey results, along with the selected vendor, were shared with area vice presidents and area commercial leads to gain alignment and agreement.

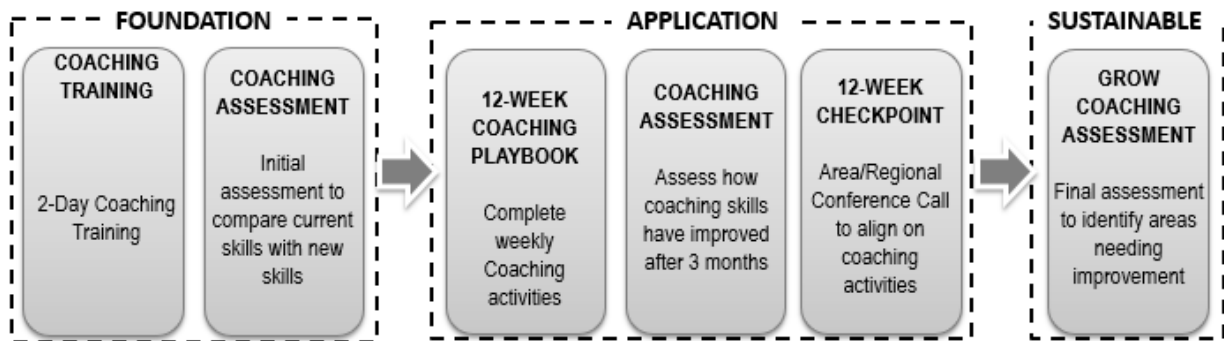
Program Design

The selected vendor worked with the L&D team and subject matter experts to customize the training program, developed both training material and supporting playbooks for on-the-job use, translated all material, and conducted a train-the-trainer certification for internal trainers.

Figure 1 outlines the coaching program. The program began with pre-work, in which the participants were asked to think of their top three leaders and come up with a list of attributes that characterized them. The participants were also asked to bring one of their “must-win” accounts to work on during training.

Next, participants attended a two-day training in which sales managers were taught how to have an effective coaching conversation using different coaching styles, identify a goal during the coaching conversation, help the person gain awareness of the current situation, create possible solutions, and establish a clear action plan and next steps. Immediately after the two-day training, participants were asked to complete a self-assessment reflecting on the new skills they had learned. In addition, the participants’ direct reports completed a similar 180-degree assessment of their managers. Sales managers were also given a 12-week coaching playbook that listed weekly activities for the sales manager to execute for each of their direct reports. The goal of the playbook was to help reinforce and put into action the skills and behaviors learned during the two-day training. At four, eight, and 12 weeks, regional trainers would host a checkpoint conference call for sales managers to attend and provide feedback of their progress in implementing the coaching skills.

Figure 1. Sales Coaching Training Program Design



Due to the investment in purchasing a model from an external vendor, senior leadership asked the L&D team to demonstrate the value of sales coaching by developing training and measurement strategies that promoted the benefits of sales coaching, specifically how coaching could affect overall sales performance, the velocity at which an opportunity moved through specific stages of the sale process, and revenue.

EVALUATION METHODOLOGY

The ROI Methodology was used to evaluate the effectiveness of the program by determining the five levels of value, including participant reaction, learning, and application. Also measured were business impact, barriers and enablers, and return on investment.

Data Collection

Table 1 shows the data collection for the plan for each level of evaluation. Level 1 reaction data was gathered the last day of the training to determine the initial success of the program. For Level 2 learning, scores were averaged between the managers' and direct reports' responses from the coaching assessment, asking them to rate themselves on the skills learned in the training.

Level 3 application data was gathered three months after the training using several sources. These sources included a survey to determine the number of coaching conversations conducted over the last three months, as well as other measures, such as how quickly they were able to apply the coaching skills and their manager's support in applying the coaching skills learned. Other sources included another coaching assessment using the same questions, which was compared with the previous assessment scores to show improvement, and the coaching playbook, to measure behavioral change by executing coaching activities immediately after the training. Sales leaders agreed that the Level 4 business impact data should focus primarily on how coaching affected the velocity of an opportunity through the sale process, and then revenue and overall performance. Therefore, questions to capture these specific measures were added to the same survey sent for Level 3 data.

Level 5, ROI was a calculation of net program benefits over costs, expressed as:

$$\text{ROI (\%)} = \frac{\text{Program Benefits} - \text{Program Costs}}{\text{Program Costs}} \times 100\%$$

ROI Analysis Plan

Table 2 presents the ROI analysis plan for this project and represents a common approach to this type of analysis. It begins with the business impact measures that will be influenced by the program. The method of isolation is the participants' estimates. With participants' estimates, the data is collected in a nonthreatening, nonbiased way, and there are adjustments for error in their estimates.

EVALUATION RESULTS

A total of 324 participants attended the workshops. There were 22 workshops hosted around the world in 11 languages. Surveys, self-assessments, and playbooks to reinforce behavior were used to collect efficiency, effectiveness, and outcome measures.

Level 1. Reaction Results

Table 3 shows how participants reacted to the program. This was assessed on the last day of the training. Participants rated the program on how relevant it was to their job, learning effectiveness, worthwhile investment to their career development, and alignment with business priorities and goals. The overall reaction from the participants was above average (4.5 out of a 5.0 scale). The results from the Level 1 survey provided initial outcomes that the program was well received.

In addition to the overall Level 1 scores, 35 percent rated the knowledge and skills learned in this training as extremely critical to their success on the job, and 57 percent planned to use all the skills from the training on the job. These skills included:

- establishing clear and appropriately balanced goals
- gaining awareness of the current situation from the coachee's perspective
- providing clear and candid feedback
- identifying or creating possible solutions and helpful resources to achieve established goals
- co-creating a clear action plan for next steps.

Participants also commented that the coaching model and skills will:

- Provide a good, simple framework to guide and develop their teams.
- Help better manage necessary activities and lead their team in more productive actions.
- Demonstrate the value and difference between coaching and managing and their impact on improved performance.
- Be applied during weekly one-on-ones, field travel, and account strategy discussions to maximize each team member's potential and increase their contribution to the organization's success.
- Increase the teams' ability to overcome barriers, align strategies, advance opportunities, and improve performance.
- Be used during customer conversations to make potential difficult conversations more productive.

Participants also commented that the coaching skills and behaviors needed consistent reinforcement, and that follow-up training should be provided within six to 12 months of the initial training.

Table 1. Data Collection Plan

Evaluation Purpose: Calculate the Business Impact and ROI of Sales Coaching

Program: Sales Coaching

Responsibility: Kaycee Buckley

Date: June

Level	Broad Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
1	REACTION AND PLANNED ACTION <ul style="list-style-type: none"> Participants rate the program as relevant to their job Participants rate the program effective for their learning Participants rate the program as a worthwhile investment in their carrier development Participants agree program aligns with business priorities and goals 	<ul style="list-style-type: none"> Program receives 4 out of 5 for business results and job impact Program receives 4 out of 5 for learning effectiveness Program receives 4 out of 5 for “pre-ROI” Program receives 4 out of 5 for alignment 	Survey	Participants	Last day of training	Facilitator
2	LEARNING AND CONFIDENCE <ul style="list-style-type: none"> Discover personal coaching strengths and weaknesses Identify an individual’s skill and motivation for greatest potential Enhance leadership skills and coach more effectively to deliver targeted results Establish a coaching cadence Collaborate with colleagues to continue progressing with new skills 	<ul style="list-style-type: none"> Managers assess themselves at least 3.5 post-training Managers’ teams assessed their manager at least 3.5 post-training 	180-degree assessment	<ul style="list-style-type: none"> Participants Participants’ teams 	Last day of training	Global L&D

Level	Broad Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
3	APPLICATION AND IMPLEMENTATION <ul style="list-style-type: none"> • Conduct coaching conversations • Apply coaching skills • Complete activities in the coaching playbook 	<ul style="list-style-type: none"> • Conduct at least one coaching conversation using the coaching model for each direct report • Achieve an average 4 or above on coaching assessment as assessed by the participant and the participant's direct reports • 100% completion of playbook 	<ul style="list-style-type: none"> • Survey • Coaching assessment • Playbook 	<ul style="list-style-type: none"> • Sales managers • Sales managers' direct reports 	3 months after training	Program manager
4	BUSINESS IMPACT <ul style="list-style-type: none"> • Increase revenue • Improve velocity of opportunity • Improve overall sales performance 	Monthly sales and pipeline advancement	Performance records	Salesforce	3 months after completion of training	Program manager
5	ROI 20%					

Table 2. ROI Analysis Plan

Data Items	Methods for Isolating the Effects of the Program/Process	Methods of Converting Data to Monetary Values	Cost Categories	Intangible Benefits	Communication Targets for Final Report
<ul style="list-style-type: none"> • Velocity of opportunity • Revenue • Overall performance 	Expert estimation	Sales velocity calculation	<ul style="list-style-type: none"> • Content development (development costs, SME time, training leads time, vendor travel, and other costs) • Needs assessment • Translations • Facilitator, vendor, project team, participant travel costs • Material production • Sales manager salary • L&D team salary 	<ul style="list-style-type: none"> • Employee satisfaction • Customer satisfaction 	<ul style="list-style-type: none"> • Global commercial excellence VP & global L&D team • Area training • Area commercial directors • Area VPs

Table 3. Level 1, Reaction Results

Area	Number of Participants	Number of Events	Level 1, Reaction*
Europe	104	9	4.42
AMT	27	1	4.60
China	32	1	4.69
Japan	26	1	4.19
APAC	56	4	4.66
US	49	2	4.61
LAC	30	4	4.60
Overall	324	22	4.54

*Based on a five-point scale.

Level 2. Learning Results

Immediately after the training, participants were asked to assess themselves on the coaching skills that were being taught in the program. The assessment was also sent to their direct reports to assess their manager on the same skills. The two scores were compared to identify any differences, and then averaged, as shown in Table 4.

Results showed that the team rated their managers higher than the managers rated themselves. Based on the results and comments from Level 1, the Level 2 assessment scores tell us that the managers feel they can and should improve their coaching skills.

Table 4. Level 2, Learning Results: Coaching Assessment Scores

	1st Assessment		
	Team	Self	Average
LAC	3.98	3.54	3.88
JAPAN	4.23	3.88	4.18
US	4.25	3.80	4.14
AMT	4.22	3.78	4.11
EUROPE	4.11	3.73	4.03
CHINA	4.19	3.89	4.10
APAC	4.07	3.54	3.95
Overall	4.15	3.74	4.06

Based on a five-point scale.

Level 3. Application Results

A 90-day post-training survey was sent to participants and their managers to collect data on how they were applying the behaviors and skills learned. The survey asked similar questions from the Level 1 survey

but focused on how the coaching was applied over the last three months. The survey first asked participants to rate:

- **Job impact.** How successful has the participant been in applying the knowledge and skills learned?
- **Support tools.** Have the materials for the training been useful on the job, and has the participant been provided appropriate resources (time, money, support from manager) to apply the knowledge and skills?
- **Predictive ROI.** Have the knowledge and skills learned been a worthwhile investment in their career?

The participants' managers also completed a post-training survey in which they were asked to rate their employees on the previous categories, as well as:

- **Learning effectiveness.** Has the employee learned new knowledge or skills?
- **Business results.** Have the knowledge and skills learned improved their employee's job performance?

The application results were still good, with predictive ROI being the highest rating. However, the biggest impact to the overall-lower rating was the perceived lack of support from their reporting managers to apply coaching.

Level 3 scores provided additional information:

- 25 percent rated the knowledge and skills learned as extremely critical to their success on the job.
- 39 percent have been able to use most of the skills from the training.
- Participants agreed that coaching has had a significant impact on increased productivity and employee satisfaction, equally.

Participants commented that the coaching has had an impact on:

- structuring next steps to aid in gaining new sales, identifying activities that were wasting time, and advancing opportunities forward that were previously "stuck"
- examining a sales opportunity in different ways, finding different options that were not seen before, and overcoming large obstacles in strategic accounts
- successfully closing an opportunity that resulted in an additional revenue
- focusing on key issues of both personal and professional advancement.

In the same survey, participants were asked how many instances of the different coaching styles they had used since training. Considering that 12 weeks had passed since the training, and participants commented at the end of the training they would apply coaching to their weekly one-on-ones, the expectation was that most of the participants would have conducted at least 10-15 coaching instances. According to the results in Table 5, only half of the participants that responded used each style in one to five instances. Additionally, the overall rating dropped slightly due to other priorities.

Table 5. Level 3, Application Results: Survey

	Overall	Job Impact	Support Tools	Predictive ROI	Learning Effectiveness	Business Results
Participants	4.3	4.43	3.86	4.43		
Managers	4.24	4.07	4.25	4.56	4.34	3.85

Based on a 5-point scale.

Coaching Style	1-5 Instances	6-10 Instances	10-15 Instances	More Than 15 Instances
Coachee Initiated	54%	30%	10%	6%
Coaching for Development	51%	28%	7%	14%
Coaching for Sales Management	49%	30%	11%	10%

The same coaching assessment that had been completed by both participants and their direct reports was completed again, 90 days after training, to identify any change in behavior, as shown in Table 6.

Table 6. Level 3, Application Results: Coaching Assessment

	First Assessment			Three Months Post-Training		
	Team	Self	Average	Team	Self	Average
LAC	3.98	3.54	3.88	4.26	4.06	4.21
JAPAN	4.23	3.88	4.18	4.16	3.86	4.13
US	4.25	3.80	4.14	4.27	4.13	4.24
AMT	4.22	3.78	4.11	4.33	4.32	4.33
EUROPE	4.11	3.73	4.03	4.25	4.08	4.22
CHINA	4.19	3.89	4.10	4.67	4.46	4.62
APAC	4.07	3.54	3.95	4.19	3.98	4.14
TOTAL	4.15	3.74	4.06	4.30	4.13	4.27

Based on a five-point scale.

Barriers and Enablers

Of those that responded, 57 percent were able to apply the coaching skills within one week of the training. As participants commented, this was due to the coaching being a simple framework that was easily applied to different situations, associated worksheets and tools to help guide the conversations, and a post-training playbook that reinforced coaching activities weekly.

However, as mentioned previously, coaching conversations decreased due to several barriers, as listed in Table 7. Comments from participants specified that “other” was lack of adequate resources (time, money, equipment) to successfully apply the coaching.

Table 7. Barriers

Barriers	Percent Responded
Other	63%
Other priorities	60%
Content not practical	28%
No opportunity	13%

Level 4. Impact Results

The Level 3 survey also collected data to help calculate business outcomes, such as how often participants applied the types of coaching learned and how coaching has improved revenue, sales velocity, and overall performance. This data was used for Level 4, Impact results.

Because the expert estimation methodology was used to isolate the effects of the coaching, participants were asked how much of the improvement was a direct result of coaching and to rate their confidence in their response to factor in adjustments for error. This was then calculated into the improved data to achieve the adjusted value for both velocity of opportunity (in days) and revenue. Overall performance was kept in percentages.

Business Impact 1: Sales Velocity

Sales leaders asked that the results focus on the velocity of opportunities (in days) for only four stages of the sales cycle. This was decided based on past data that opportunities were stalling during these stages, and that sales managers were not effectively coaching their reps through these situations.

Twelve months prior to coaching, sales data showed that the velocity of an opportunity took an average 235.2 days to move through the four selected stages. Using the data from the survey, participants responded that the velocity of opportunities has improved by 41 percent, given all factors since the coaching training. They then responded that 46 percent of that improvement was a direct result of coaching. To adjust for error, participants responded that they were 63 percent confident in their estimation. Table 8 shows the final adjusted value of a 27.9 days’ improvement in the velocity of an opportunity.

Although the velocity is important impact data and it is developed and presented separately, it is not converted to money, because that would be double counting. The additional revenue generated by the reduced sales cycle time is additional revenue that is included in the total revenue amount. It is already counted in the conversion of revenue to money with the use of the profit margin.

Table 8. Velocity of Opportunities

	Prior Year	Post-Period	Improvement	Direct Result of Coaching	Adjusted Value
Velocity of Opportunities*	--	41% improvement given all factors		46% of improvement due to coaching	63% confident of estimations
	235.2 days	138.8 days	96.4 days (reduction)	44.3 days	27.9 days

*Stages measured: Investigate, Propose, Commit, Implement

Business Impact 2: Revenue

The same expert estimation was used to calculate the impact to revenue. Profit margin was factored in to show actual profit gained. Table -9 outlines the steps used to calculate the impact for revenue.

Table 9. Revenue Calculation

Steps	Results
1. Gathered annual revenue of 12 months prior to coaching training	\$4,813,000
2. Gathered annual revenue for the 12 months after the launch of coaching and added the adjusted sales velocity value	\$5,616,000
3. Calculated the difference of the values for pre- and post-coaching	$\$5,616,000 - \$4,813,000 = \$803,000$ improved value
4. Calculated the percentage of improvement that was a direct result of coaching to the improved value to get the contribution value	$\$803,000 \times 36\% = \$289,080$ contribution value
5. Calculated confidence estimates to factor in any error and get the adjusted value	$\$289,080 \times 63\% = \$182,120.40$ adjusted value
6. Multiplied the annual revenue by the profit margin	$\$182,120.40 \times 60\% = \$109,272.24$

Participants were asked how coaching has improved their team’s performance. The estimates were left in percentages, as shown in Table 10.

Table 10. Overall Performance

	Improvement	Direct Result of Coaching	Confidence in Rating
Overall Performance	45%	43%	63%

The Costs

Table 11 shows the costs allocated to this program. The most significant cost was the development costs from the supplier, which included translations, facilitation, production, train-the-trainer certification, license fees, and any travel expenses from the supplier. The development and production costs for the workshops totaled \$215,800. Because the coaching workshop was delivered to more than 300 sales managers around the globe, the salary varied. Therefore, the average sales manager salary was used to calculate their time for the two days. All coaching workshops were conducted locally, on-site; therefore, no other facilitation fees were incurred. Costs for facilitation by the local training teams were calculated using the average salary for the two days, plus another two days for the train-the-trainer certification.

Additionally, there was an overhead cost for the total learning and development team, which was \$480 for 400 hours (total involvement of the L&D team). When all the costs are included, the total, as indicated in Table 11, is \$705,566.

Table 11. Costs

Supplier Costs		
IP and participant materials	\$450 per leader	145,800
Facilitation	\$13,500 per session/4 sessions	\$54,000
Train-the-trainer certification workshop	First 10 facilitators no cost	\$0
Customization		\$10,000
Travel expenses	\$2,000 per individual (3 individuals; 1 on-site meeting)	\$6000
Sales Manager Costs		
Two days for workshop	Average \$135,000/manager divided by 260 workdays \$519/participant x 2 days	\$336,312
Local Facilitator Costs	Average 100,000/facilitator divided by 260 workdays \$385/facilitator x 2 days (TTT) + \$385/facilitator x 2 days (workshop)	\$15,400
L&D Team Costs*	Average \$125,000/L&D leader divided by 260 workdays \$480 x 400 hours	\$192,000
Total		\$705,566

*Assessment and evaluation costs were included in overall L&D team costs.

ROI Calculation

When the total monetary benefits are compared with the total costs, the ROI calculation is:

$$\text{ROI (\%)} = \frac{\$109,272.24 - \$705,566}{\$705,566} \times 100\% = -85\%$$

Although there was an initial positive reaction to the program, the result was a negative ROI. For every dollar invested in this program, it cost an additional 85 cents. We can use a concept called sensitivity analysis from the finance and accounting field to see how the output can change if we change the input. This program has a negative ROI because the numerator is not where it needs to be, and the cost is probably more than it should have been. Let's examine these two elements.

First, for the benefits, it could be argued that this program should be a two-year solution. That is, as the managers developed coaching on the job, they will use it routinely over a period of time. This application of coaching should make a difference for a longer period. Two years of data could be used and possibly justified. However, to be extra conservative, we used only one year. This is Guiding Principle 9 of the ROI Methodology.

Second, a significant cost is the cost of taking the managers off the job. Some would argue that these are busy managers who likely took care of issues, clients, and sales reps needs either during the workshops, immediately after, during the meetings, or at lunch. You could make a case for not including this cost. If this cost is removed, and the benefits are claimed for two years, the ROI is almost positive. However, to be conservative, this cost is included. Including this cost illustrates the conservative nature of this process and makes for a more credible analysis.

The key is to make adjustments going forward with the numerator and denominator.

Intangible Benefits

The following intangible benefits were connected to this project:

- positive customer experience due to a shorter sales cycle
- employee satisfaction
- career development
- personal and professional advancement
- more productive and structured customer conversations and negotiations.

These were the most commented intangible benefits from the Levels 1 and 3 surveys. These intangibles represent an important data set for sales leadership. If they were converted to monetary value, there would be even more value from this program and a higher ROI. The L&D team felt that these intangible benefits were just as important as the business impact and ROI; therefore, they agreed to continue with coaching but with adjustments, and that over time the ROI would be positive.

COMMUNICATION STRATEGY

Initially, only Levels 1–4 data were presented to the area vice presidents and other stakeholders. At that time, ROI data had not been calculated and presented because revenue numbers were not available.

However, after the ROI was calculated, significant negative results were identified. The team notified the L&D director who agreed that the results needed to be shared with the commercial vice president right away. The presentation, which included the methodology and along with the results for each level, intrigued the commercial vice president, who asked that the results be reviewed with the area commercial directors at the Global Commercial staff meeting.

After the staff meeting, Global Commercial leaders, impressed with the ROI Methodology, commented that they finally had a way to show how their training and skills brought value to the organization. They expressed their commitment to making the adjustments needed for the coaching to be successful. Additionally, because of the interest in ROI Methodology, the L&D team is planning to do additional ROI studies.

As the ROI study indicated, the L&D team and business leaders agreed that coaching was important and could impact the business. The business leaders recognized that while a few people consistently applying coaching skills would move the needle in the right direction, many more needed to do that before they could make a positive impact. The organization is now committed to making coaching a priority and agreed to continue measuring the application and quality of the L&D team's coaching and, ultimately, to create a coaching culture.

Lessons Learned

Coaching is important and affects the business positively. However, coaching is ineffective, as shown in this case, when it is not reinforced with refresher training or supported by upper management, and when there is no behavioral change in the sale managers.

For example, the coaching playbook was effective in reminding managers to apply skills learned through prescribed activities over 12 weeks, but this did not successfully change behavior or measure the quality of the coaching conversations. Due to the lack of support from upper management and other priorities, the playbook was perceived as a "check the box" activity.

Overall, there was a notable impact on applying coaching. As discovered from the needs analysis, the coaching model that was implemented did meet the needs of being clear, easy to use, standardized, consistent globally, adaptable to any situation, and allowing for feedback, action, and follow-up, with a clear plan and achievable results supported by a global cadence and tools.

But as the company discovered, coaching is not a skill but a culture, and, therefore, was not able to show a positive ROI within the first year of implementation. Without proper reinforcement, instances of coaching declined, and focus has returned to making the number each month. The next step is to continue developing the behavior and give sales managers a compelling reason to change. Using the data presented in this case study, Global Healthcare has modified the coaching assessment to measure more of what types of coaching are being used, and the quality of coaching conversations. This will allow the company to continue monitoring different metrics for business impact and provide managers with specific data on how coaching will affect their business and help their teams be successful.

QUESTIONS FOR DISCUSSION

1. Why do you think there was a positive reaction at the beginning, but the program generated a negative ROI?
2. What are the pros and cons for having a negative ROI study?
3. What other changes could have been made to show a positive ROI?
4. What are the strengths of this case?

ABOUT THE AUTHOR

Kaycee Buckley is the global commercial training manager for a global healthcare company. She is accountable for leading best-in-class training on topics such as identifying competencies and measuring business impact, supporting more than 2,000 employees to institutionalize organizational initiatives and drive global standardization. Recently, Kaycee was recognized for developing and delivering the first-ever standardized global sales new hire training curriculum for the division, including a series of training events to support the launch of a new product, which achieved 60 percent performance improvement in overall revenue and qualified opportunities. Kaycee has more than 20 years of experience in the learning and development industry, and a passion to show how training affects the overall success of a business.

ABOUT ROI INSTITUTE®

ROI Institute, Inc., founded in 1992 as a service-driven organization, assists professionals in improving programs and processes using the ROI Methodology® developed by Dr. Jack J. Phillips and Dr. Patti P. Phillips. This Methodology is the global leader in measurement and evaluation including the use of return on investment (ROI) in non-traditional applications. ROI Institute regularly offers workshops, provides consulting services, publishes books and case studies, and conducts research on the use of measurement and ROI. This makes ROI Institute the leading source of content, tools, and services in measurement, evaluation, and analytics. Working with more than one hundred ROI consultants, ROI Institute applies the ROI Methodology in 20 fields in over 70 countries. ROI Institute authors have written or edited over 100 books, translated into 38 languages. Organizations build internal capability with the help of ROI Institute and its ROI Certification process. By successfully completing this process, individuals are awarded the Certified ROI Professional® (CRP) designation, which is respected by executives in organizations worldwide.

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