

## Speaking Proposal for ICF Chapter Presentation

**Session Title:** Using Design Thinking to Deliver Business Results from Coaching

**Session Date:** March 6, 2019 from 12:00 – 1:00pm MT

**Session Type:** Virtual Program (Webinar)

**Session Presenter:** Jack Phillips, Ph.D., Chairman, ROI Institute, Inc.

**CCEs:** 1.0 in Resource Development

Executives recognize that coaching is necessary to meet the challenges of a complex and global economy. And individuals recognize that coaching positively impacts their life when goals and dreams are realized. Unfortunately, there are some persistent concerns within the coaching community about how and when coaching should be evaluated particularly at the Impact and ROI level. Dr. Jack J. Phillips, Chairman, ROI Institute, will address this by highlighting the reasons why coaching is an absolute necessity; how it adds value to an organization's bottom line; and, using a methodical, multi-step, results-driven process based on design thinking, explain how to enhance the investment in coaching.

### WHAT YOU'LL LEARN:

This learning experience will teach you:

- How does Return on Investment (ROI) apply to coaching?
- The five levels of ROI evaluation
- The 12 easy steps of the ROI Methodology
- How to apply the Methodology
- How this will deliver results for growing your coaching business

These will be explained, demonstrated through lecture, discussion, and hands-on examples of business case studies.

### ABOUT PRESENTER:

Dr. Jack J. Phillips, world-renowned expert on accountability, measurement, and evaluation, is co-founder and chairman of the ROI Institute. Phillips provides consulting services for Fortune 500 companies and major global organizations, conducts workshops and presents at conferences throughout the world, and is the author of more than 75 books, including *Measuring the Success of Coaching*. Phillips has served as training and development manager at two Fortune 500 firms, as senior human resource officer at two firms, as president of a regional banking system, and as management professor at a major state university.

Learn more at: [www.roiinstitute.net](http://www.roiinstitute.net)

### COST:

- \$15 chapter active members
- \$20 all others



## OD Network Webinar Proposal

### **Measuring the ROI of Organizational Development: Proving the Value of Organization Development Projects**

**Presenter:**

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

**Description:**

OD professionals everywhere are under pressure to prove the value of their efforts. If they can't, management buy-in, budgetary support, and even their jobs are at risk. After all, OD programs don't come cheap. It is possible to connect hard numbers to the impact of OD programs, projects, and initiatives, especially soft skills topics such as leadership development. And it is feasible to calculate the financial ROI in a credible way, without draining resources.

This session will present a proven way to design an OD project to deliver impact, calculate ROI, and use the results to maintain or enhance the OD budget.

After attending this session, participants will be able to:

1. Identify the types of data executives need from OD projects.
2. Align OD projects to the business.
3. Follow the steps to calculate the ROI.
4. Use the results from OD projects to influence the OD budget.

# ATD Core 4 Speaking Proposal

**Title:** Providing Results That Executives (and Others) Will Love

**Speaker:** Jack J. Phillips, Ph.D., Chairman, ROI Institute

**Track:** Measurement & Evaluation

Learning and development programs are evaluated for a purpose and the results are used to make improvements. All stakeholders involved in initiating, designing, developing, facilitating, implementing, and supporting programs must see the results of their efforts. This session shows how to measure up to five levels of evaluation, including impact and ROI. It also emphasizes what executives (the funders) want to see and provides examples of where ROI is occurring and how it is developed.

By attending this session, you will be able to:

- Explore the data sets possible from learning and development, by categories, including ROI.
- Identify the categories that are desired by top executives and other key stakeholders.
- Explain how these measures are derived and developed.
- Pursue a plan to measure results and communicate results to different audiences.

## Presentation Talking Points

### Providing Results Executives (and others) Will Love

By Jack J. Phillips

How do learning and development professionals provide results executives (and others) will love? The answer is quite simple, they plan for those results. Executives want to see the business value of learning programs. Demonstrating the business value of learning is a process that must permeate the learning cycle, starting with *why*? Delivering the business value from learning involves ten steps.

1. **Start with *why*.** Most if not all, learning and development programs should start with *why* which is often a business connection to improve measures such as productivity, quality, cycle time, cost reduction, retention, compliance, engagement, customer satisfaction, and customer loyalty, to name a few.
2. **Connect to the right solution.** Many programs are implemented for the wrong reasons. They may be requested by an executive team who “thinks” learning is the solution, or it may be based on a trend or a hot topic. While the program may be interesting and important, it may not be needed for the target audience. Connecting a proposed learning program directly to a business need will ensure that it’s the right solution to drive that business need.
3. **Define expectations.** All stakeholders need to know what’s expected of them. This often starts with setting objectives at different levels for reaction, learning, application, impact, and even ROI, when needed. It also involves setting expectations for designers, developers, facilitators, participants, managers of participants, and sponsors who must know that learning is not successful unless it has been applied and has an impact in the organization.
4. **Design for results.** Programs must be designed to deliver results, ensuring that there is appropriate focus on application and impact. Tools, templates, and action plans must be in place and proper support must be provided to help achieve the desired results.
5. **Create or acquire powerful content.** The heart of any program is content. While the learning environment and experience are important, the content is most important to drive business value. The content must be something the participants will use.
6. **Deliver for efficiency and effectiveness.** In today’s workplace, the focus is on delivering learning with less cost, more convenience, and in shorter time spans. But the learning must also be effective, delivering the value that is needed.
7. **Ensure the transfer of learning.** Examine the environment even before the new learning solution is developed to make sure that the barriers are either minimized or removed and that there are sufficient enablers to make learning work.
8. **Measure results.** Results are measured at the different levels, always measuring at Reaction, because it is a good predictor of program’s later success. Learning (Level 2) should be measured for 80-90% of programs and Application (Level 3) for about 30 percent of programs. Business Impact should be measured in about 10 to 20 percent of programs. Finally, for programs that are very expensive, important, and strategic, the evaluation should be pushed to ROI (Level 5), usually in 5 percent of programs
9. **Communicate the results to key stakeholders.** Communicating the results to the key stakeholders is vital. Many groups need to see success (and opportunities for

improvement). Managers of participants want to see the success for application and impact. Top-executives who provide budgets need the results for future funding decisions.

10. **Use the results for optimization and allocation.** Results are powerful, particularly when evaluations at Level 3, 4, and 5 are pursued. The data should be used to improve programs, so they can deliver more value in the future, optimizing the return on investment. Higher returns may reveal better ways to allocate funding for programs in the future. Evaluation leads to optimization, which leads to better allocation of budgets.

Following these ten steps will make a significant difference in the value of learning and development and its effect on the organization, providing the results executives (and others) will love