



## Can Learning and Training Programs Drive Business Results?

Presented by Patti P. Phillips, Ph.D., CEO, ROI Institute, Inc.

THE 2022 Performance Improvement Conference | April 24-28, 2022 | Spark Center | Nashville, TN

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### The answer to the question, is....

A. Yes

B. No

C. Maybe



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### Session Objectives

After attending this session, participants should be able to:

1. List the data sets possible from learning and talent development programs by categories, including ROI.
2. Identify the categories desired by top executives and other key stakeholders.
3. Explain how these measures are derived and developed.
4. Pursue a plan to measure and communicate results to different audiences.



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**Resources**

QR Code

Books shown:

- The Alignment Conversion
- The ROI Methodology
- The Business Case for Learning
- Value for Money
- Can Learning and Training Programs Drive Business Results?

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**Rapid Fire Response: Serious Performance Challenges**

**True or False?**

- Most of learning and development is wasted (not used).
- The learning outcome desired by executives in client organizations is rarely measured.
- Most learning providers do not have data showing that they make a difference in the organization.
- Most executives see learning as a cost and not an investment.
- Most executives view hard skills more valuable than soft skills.

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**Rapid Fire Response: Serious Performance Challenges**

**True or False?**

- Most of learning and development is wasted (not used). *It's much worse for virtual.*
- The learning outcome desired by executives in client organizations is rarely measured.
- Most learning providers do not have data showing that they make a difference in the organization.
- Most executives see learning as a cost and not an investment.
- Most executives view hard skills more valuable than soft skills.

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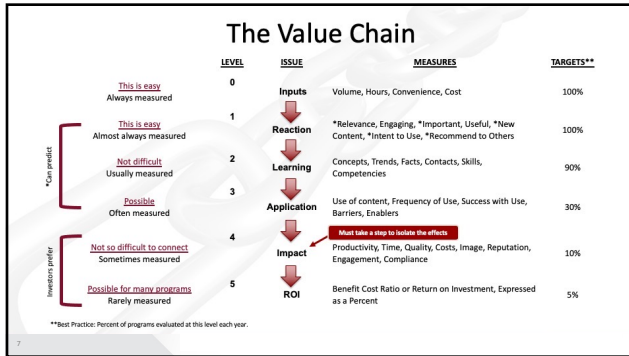
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### ROI Defined

$$BCR = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

$$ROI = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$

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#### ROI Calculation Example

Program: Inclusive Leadership

Program Benefits = \$762,393

Program Costs = \$387,708

Rapid Fire Response: What is the ROI?

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ROI Defined

BCR =  $\frac{\$762,393}{\$387,708} =$

ROI =  $\frac{\$762,393 - \$387,708}{\$387,708} \times 100 =$

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ROI Defined

BCR =  $\frac{\$762,393}{\$387,708} = 1.97:1$

ROI =  $\frac{\$762,393 - \$387,708}{\$387,708} \times 100 = 97\%$

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What CEOs Want

| Measures              | Currently Measure | Should Measure | Importance |
|-----------------------|-------------------|----------------|------------|
| Inputs and Indicators | 94%               | 86%            | 6          |
| Efficiency            | 78%               | 82%            | 7          |
| Reaction              | 53%               | 22%            | 8          |
| Learning              | 32%               | 28%            | 5          |
| Application           | 11%               | 61%            | 4          |
| Impact                | 8%                | 96%            | 1          |
| ROI                   | 4%                | 74%            | 2          |
| Awards                | 40%               | 44%            | 3          |

ROI Institute and ATD research show that the data CEOs receive are not demonstrating what they want out of their talent investment. (N=96)

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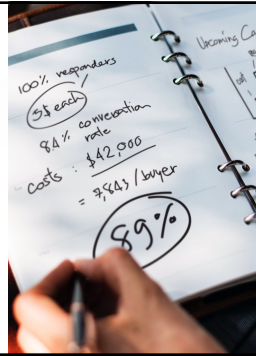
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What percent of your programs do you evaluate at the impact level per year?

- A. None
- B. About 5%
- C. About 10%
- D. About 15%
- E. More than 20%




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### Measurement Targets

| Level         | Recommended % of Programs | **Benchmarking % |
|---------------|---------------------------|------------------|
| 0 Input       | 100%                      | 100%             |
| 1 Reaction    | 100%                      | 80%              |
| 2 Learning    | 80-90%                    | 70%              |
| 3 Application | 30%                       | 49%              |
| 4 Impact      | 10%                       | 37%              |
| 5 ROI         | 5%                        | 18%              |

\*Percentage of programs evaluated at each level each year  
 \*\*Benchmarking 2020

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### Characteristics of Programs Suitable for Impact & ROI

- Cost of the program
- Linkage of program to operational goals and issues
- Importance of program to strategic objectives
- Top administrator interest in the evaluation
- Visibility of the program
- Size of target audience
- Investment of time required

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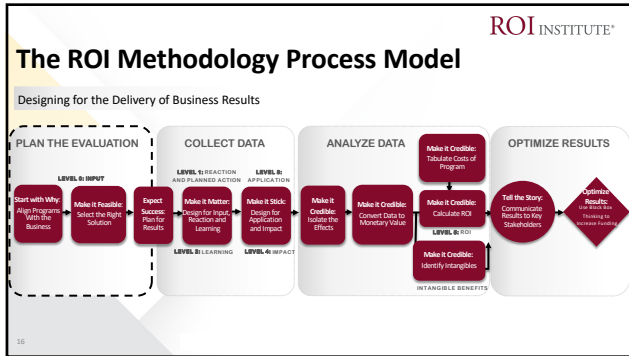
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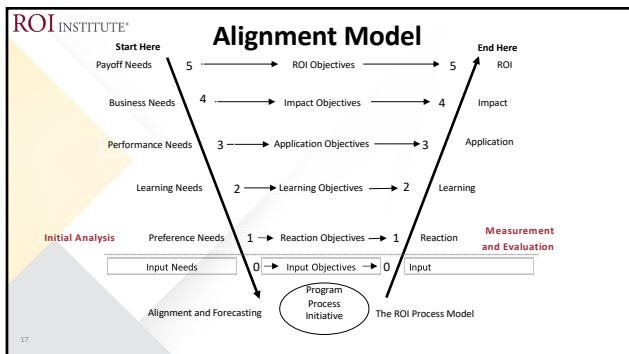
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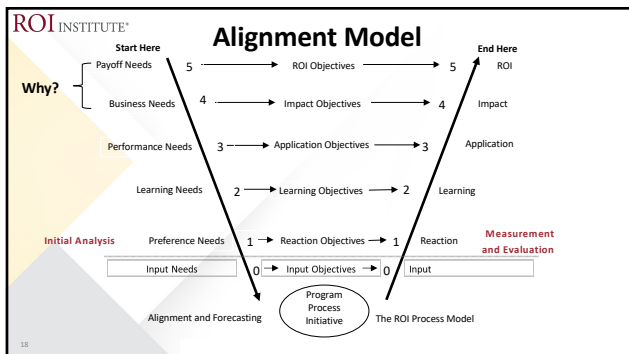
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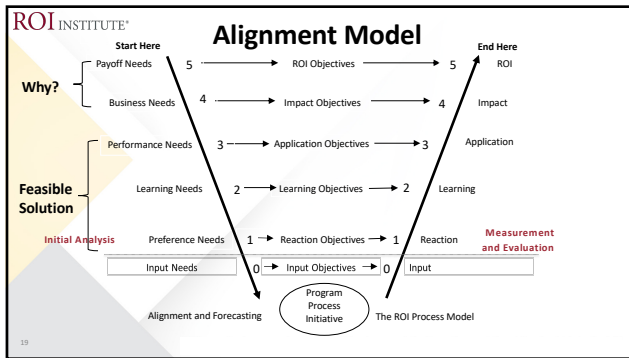
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### Developing Objectives for Each Level

| Levels                      | Focus                                                                                                                                                                        |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Level 1, Reaction</b>    | Defines specific measures of expected reaction to the program as it is revealed and communicated to the stakeholders                                                         |
| <b>Level 2, Learning</b>    | Defines specific measures of improvement in knowledge, information, contacts, and skills as the participants and other stakeholders learn how to make the program successful |
| <b>Level 3, Application</b> | Defines specific measures of actions taken that define success with application and implementation of program                                                                |
| <b>Level 4, Impact</b>      | Defines the specific impact measures that will change or improve as a consequence of the program's implementation                                                            |
| <b>Level 5, ROI</b>         | Defines the minimum return on investment from the program, comparing program costs with monetary benefits from the program                                                   |

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### Match Evaluation Levels with Objectives

| After completing this program or project, participants should:                                 | Evaluation Level |
|------------------------------------------------------------------------------------------------|------------------|
| 1. Decrease citizen complaints by 20% in one year.                                             |                  |
| 2. Use problem-solving skills to uncover causes of problems.                                   |                  |
| 3. Be able to demonstrate the five steps to determine if there is a food security issue.       |                  |
| 4. Rate the facilitator 4 out of 5 on presentation skills.                                     |                  |
| 5. Decrease the amount of time required to develop a proposal by 25%.                          |                  |
| 6. Achieve a 20% ROI one year after program implementation.                                    |                  |
| 7. Perceive the content to be relevant to actual situations (4.5 out of 5).                    |                  |
| 8. Decrease security breaches by 25% in six months.                                            |                  |
| 9. Conduct a proper investigation using the seven-step process in 95% of complaint situations. |                  |
| 10. Score an average of 75 or better on new strategy quiz.                                     |                  |

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| Match Evaluation Levels with Objectives                                                        |                  |
|------------------------------------------------------------------------------------------------|------------------|
| After completing this program or project, participants should:                                 | Evaluation Level |
| 1. Decrease citizen complaints by 20% in one year.                                             | 4                |
| 2. Use problem-solving skills to uncover causes of problems.                                   | 3                |
| 3. Be able to demonstrate the five steps to determine if there is a food security issue.       | 2                |
| 4. Rate the facilitator 4 out of 5 on presentation skills.                                     | 1                |
| 5. Decrease the amount of time required to develop a proposal by 25%.                          | 4                |
| 6. Achieve a 20% ROI one year after program implementation.                                    | 5                |
| 7. Perceive the content to be relevant to actual situations (4.5 out of 5).                    | 1                |
| 8. Decrease security breaches by 25% in six months.                                            | 4                |
| 9. Conduct a proper investigation using the seven-step process in 95% of complaint situations. | 3                |
| 10. Score an average of 75 or better on new strategy quiz.                                     | 2                |

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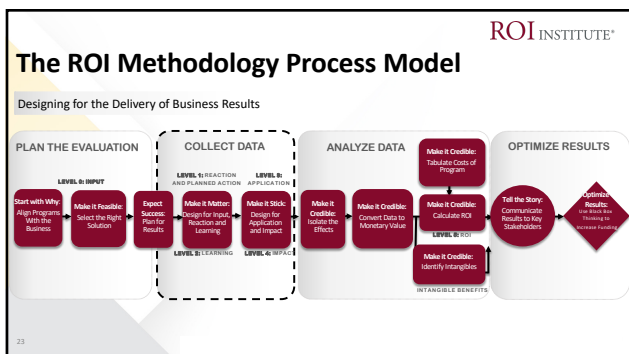
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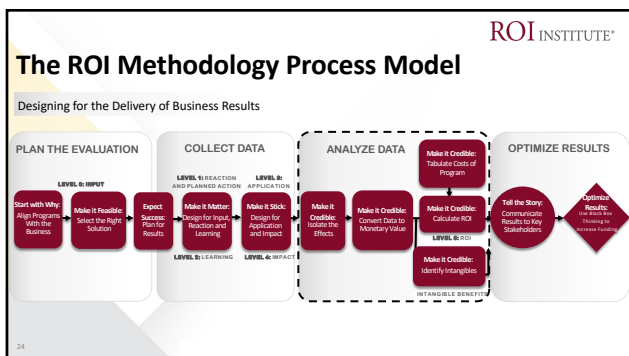
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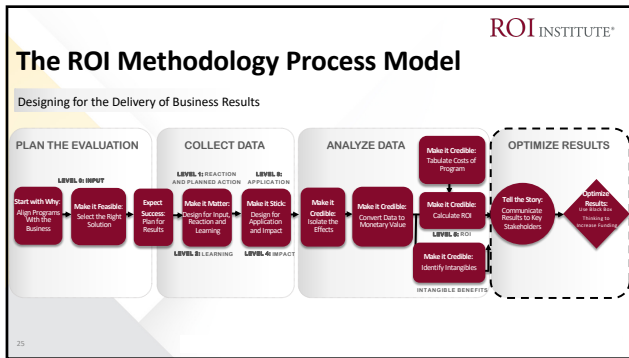
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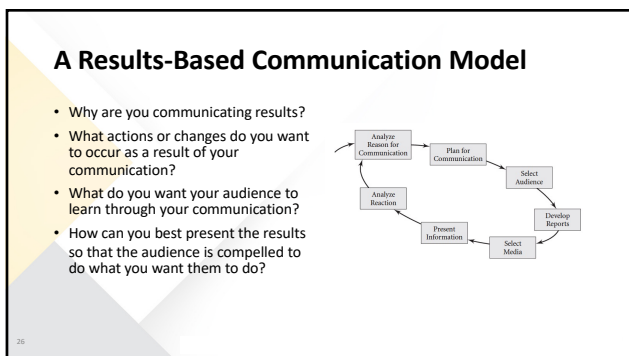
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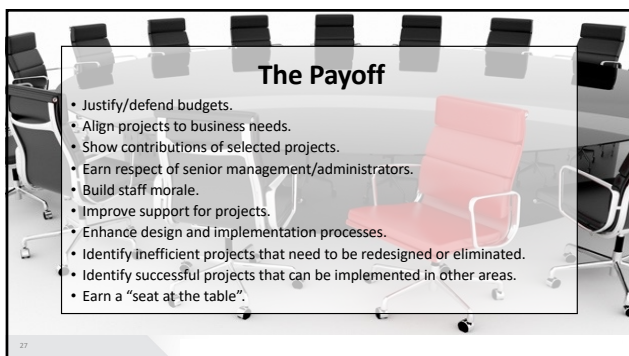
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### Be Proactive

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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Visit the link below or scan the QR code to access resources from today's session.

<https://roiinstitute.net/ispi-2022-can-learning-and-training-programs-drive-business-results-2/>

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## ROI CERTIFICATION®

### SCHEDULED EVENTS

|                                            |                                      |
|--------------------------------------------|--------------------------------------|
| June 20-July 1, 2022 — Live Virtual        | September 12-16, 2022 — Boise, ID    |
| July 11-15, 2022 — Salt Lake City, Utah    | September 19-30, 2022 — Live Virtual |
| July 25-29, 2022 — Denver, CO              | October 3-7, 2022 — Birmingham, AL   |
| August 15-19, 2022 — San Diego, CA         | November 14-18, 2022 — Atlanta, GA   |
| August 22-September 2, 2022 — Live Virtual | December 5-9, 2022 — Charlotte, NC   |

**WHAT IS ROI CERTIFICATION?**

ROI Certification is a globally renowned process focused on measuring the true value of tough-to-measure initiatives using the ROI Methodology®. Participating in ROI Certification is the most comprehensive way to gain the skills needed to evaluate major programs and to report the most credible results that drive organizational improvement.

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Questions?  
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Email:  
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**Patti P. Phillips, Ph.D.**

- CEO, ROI Institute, Inc.
- Chair, I4cp People Analytics Board
- Chair, Center for Talent Reporting Board
- Senior Advisor, The Conference Board
- Member, UN Institute for Training and Research Board of Trustees
- Member, International Federation of Training and Development Board
- Fellow, ATD Certified Professional in Talent Development
- Author, Educator, Consultant, Coach



Defining the  
Return on Investment

Benefits/Cost Ratio =  $\frac{\text{Monetary Benefits}}{\text{Program Costs}}$

ROI =  $\frac{\text{Monetary Benefits}}{\text{Costs}}$

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