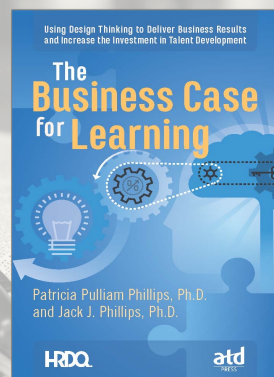
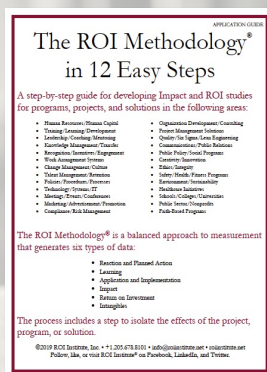




Getting Measurable Results from Training

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

1



Resources



2

Objectives

After attending this session, participants should be able to:

1. Identify the key challenges in the learning development community.
2. Identify the five outcomes from learning programs.
3. Discuss how culture can improve learning and development.



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Serious Performance Challenges

**True
or
False?**

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

4

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Serious Performance Challenges

True
or
False?

1. Most learning and development is wasted (no measurable results).
2. The learning outcome desired by executives in most organizations is rarely measured.
3. Most learning providers do not have data showing that they make a difference in the organization.
4. Most executives see learning as a cost and not an investment.
5. Most executives view hard skills more valuable than soft skills.

It's much worse for virtual.

5

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The Value Chain

	LEVEL	ISSUE	MEASURES	TARGETS**
	0	Inputs	Volume, Hours, Convenience, Cost	100%
	1	Reaction	*Relevance, Engaging, *Important, Useful, *New Content, *Intent to Use, *Recommend to Others	100%
*Can predict	2	Learning	Concepts, Trends, Facts, Contacts, Skills, Competencies	90%
	3	Application	Use of content, Frequency of Use, Success with Use, Barriers, Enablers	30%
	4	Impact	Productivity, Time, Quality, Costs, Image, Reputation, Engagement, Compliance	10%
Executives prefer	5	ROI	Benefit Cost Ratio or Return on Investment, Expressed as a Percent	5%

**Best Practice: Percent of programs evaluated at this level each year.

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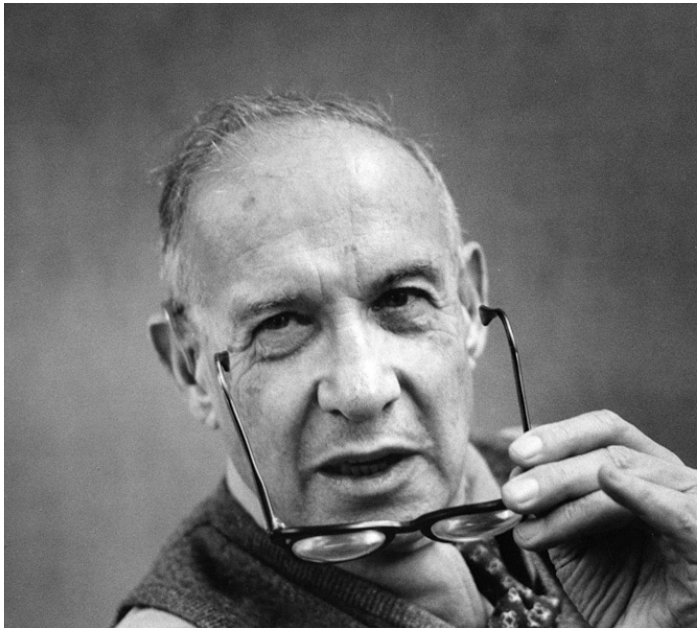
What CEOs Want

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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“The best way to predict the future is to create it.”

—Peter F. Drucker

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Changing Paradigms for Learning

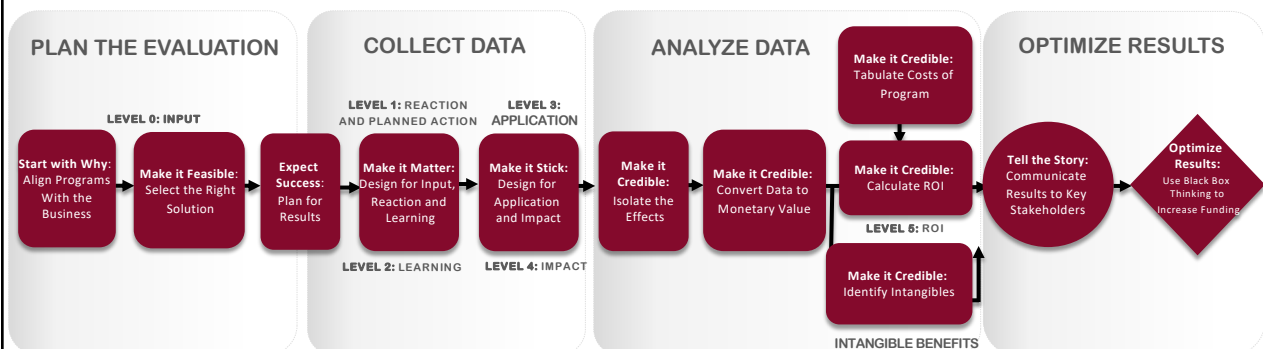
Traditional	Emerging
Job Training	Talent Development
Scale and Scope	Speed and Adaptability
Input Focus	Outcome Focus
Cost	Investment
Necessity	Value Driver
Standardization	Customization
Fixed Setting and Time	Agile and Flexible
Science of Learning	Learning Analytics
Command and Control	Empowerment
Needs Assessment	Alignment
Reaction and Learning	Impact and ROI

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The ROI Methodology Process Model

Designing for the Delivery of Business Results

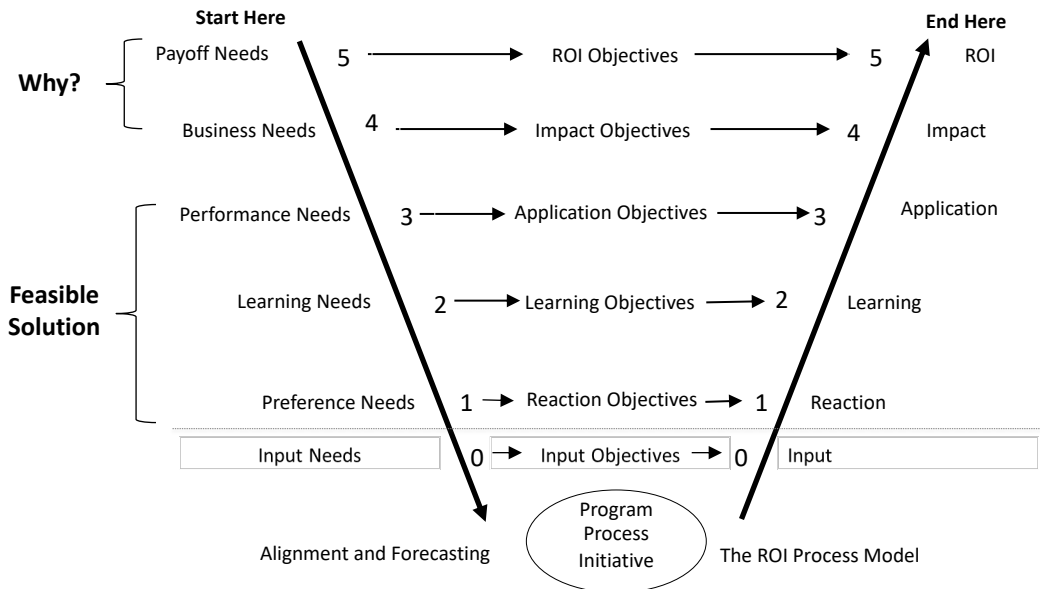


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Key Challenge #1: Alignment



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Key Challenge #2: Developing Objectives at Each Level

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

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Key Challenge #3: Learning Transfer

Which are the two most important boxes in which to work?

		Timeframe		
		Before	During	After
Role-Players*	Manager	1	2	3
	Participant	4	5	6
	Facilitator/ Organizer	7	8	9

**Replace role players with whomever is most influential for your program.*

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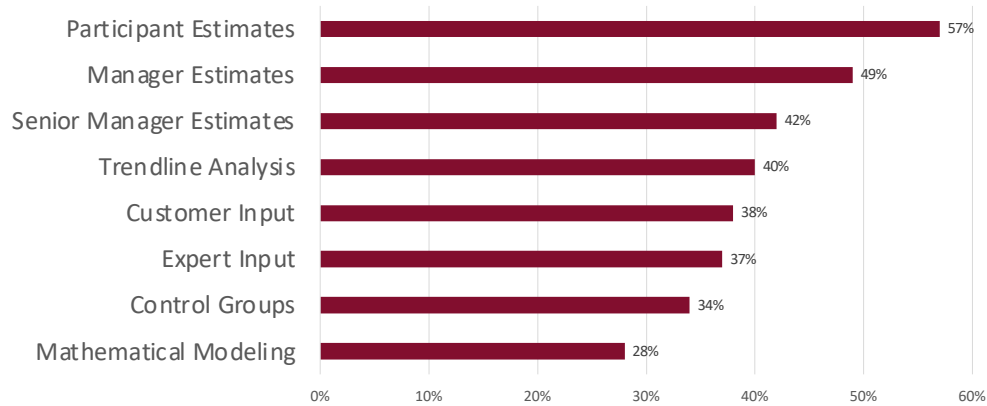
Key Challenge #4: Data Collection

Method	Level			
	1	2	3	4
• Surveys	✓	✓	✓	
• Questionnaires	✓	✓	✓	✓
• Observation	✓	✓	✓	
• Interviews	✓	✓	✓	
• Focus Groups	✓	✓	✓	
• Tests/Quizzes		✓		
• Demonstrations		✓		
• Simulations		✓		
• Action planning/improvement plans			✓	✓
• Performance contracting			✓	✓
• Performance monitoring				✓

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Key Challenge #5: Isolation

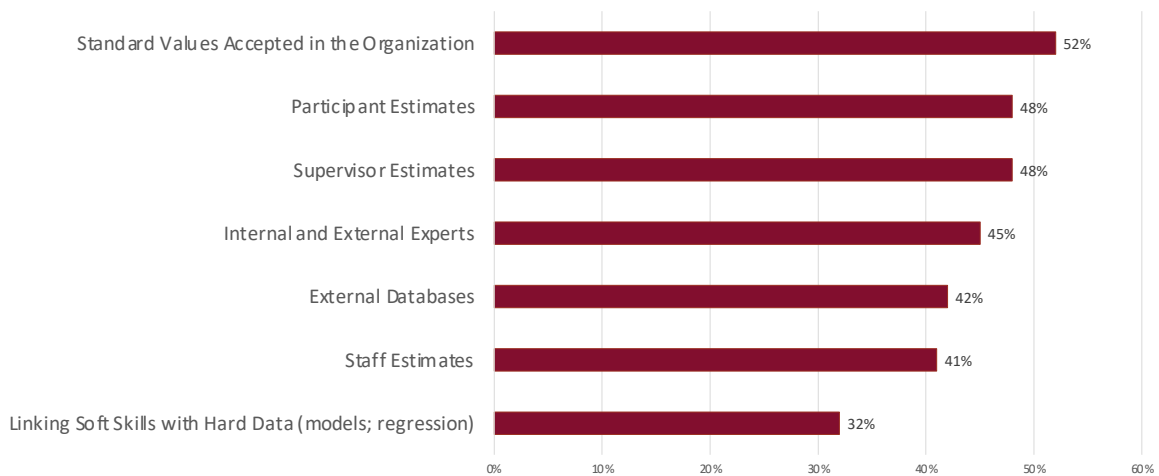


Survey of Users, n = 246

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Key Challenge #6: Converting Data to Money



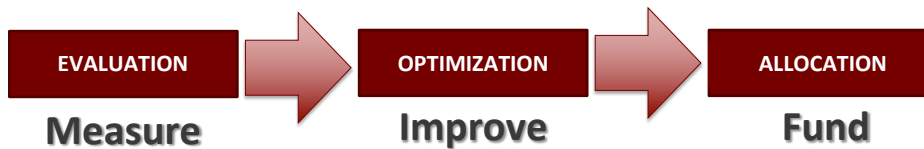
Survey of Users, n = 246

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Key Challenge #6: Optimize Results

Use Black Box Thinking to Increase Funding



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The Payoff

- Justify/defend budgets.
- Align projects to business needs.
- Show contributions of selected projects.
- Earn respect of senior management/administrators.
- Build staff morale.
- Improve support for projects.
- Enhance design and implementation processes.
- Identify inefficient projects that need to be redesigned or eliminated.
- Identify successful projects that can be implemented in other areas.
- Earn a “seat at the table”.

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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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[Click here](#) or scan the QR code to receive resources from today's session.

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ROI CERTIFICATION®

SCHEDULED EVENTS

November 29-December 10, 2021 — Live Virtual

January 10-14, 2022 — Focused on Healthcare

January 17-28, 2022 — Live Virtual

February 28-March 4, 2022 — Orlando, FL

April 11-15, 2022 — New Orleans, LA

May 9-13, 2022 — Orlando, FL

June 13-17, 2022 — Salt Lake City, Utah

July 11-15, 2022 — Williamsburg, VA

July 25-29, 2022 — Denver, CO

August 15-19, 2022 — San Diego, CA

September 12-16, 2022 — Boston, MA

October 10-14, 2022 — Seattle, WA

November 14-18, 2022 — Atlanta, GA

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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