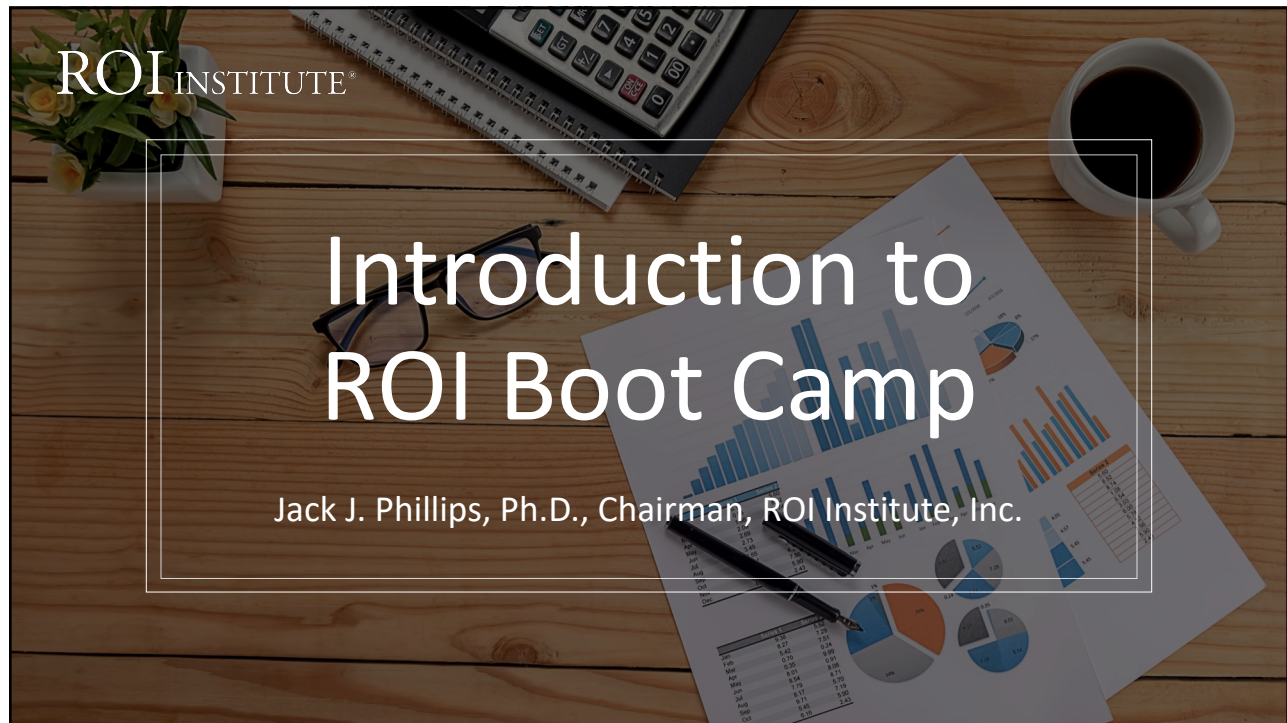
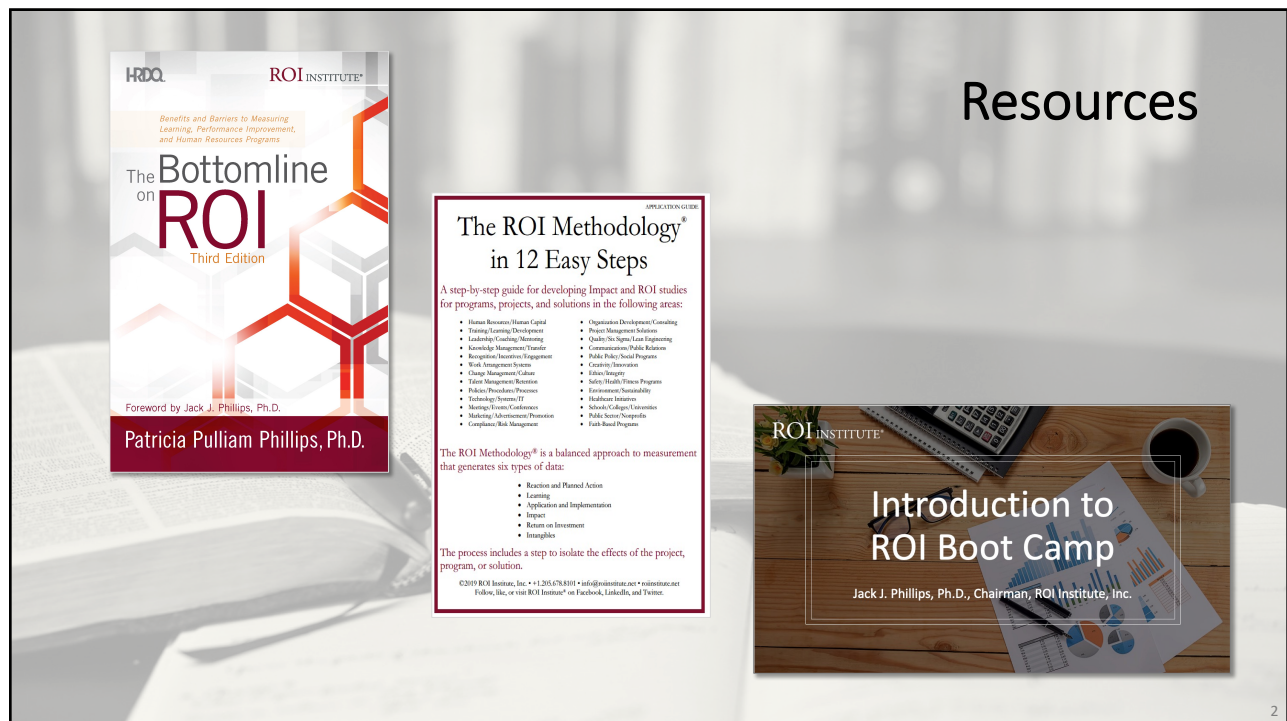




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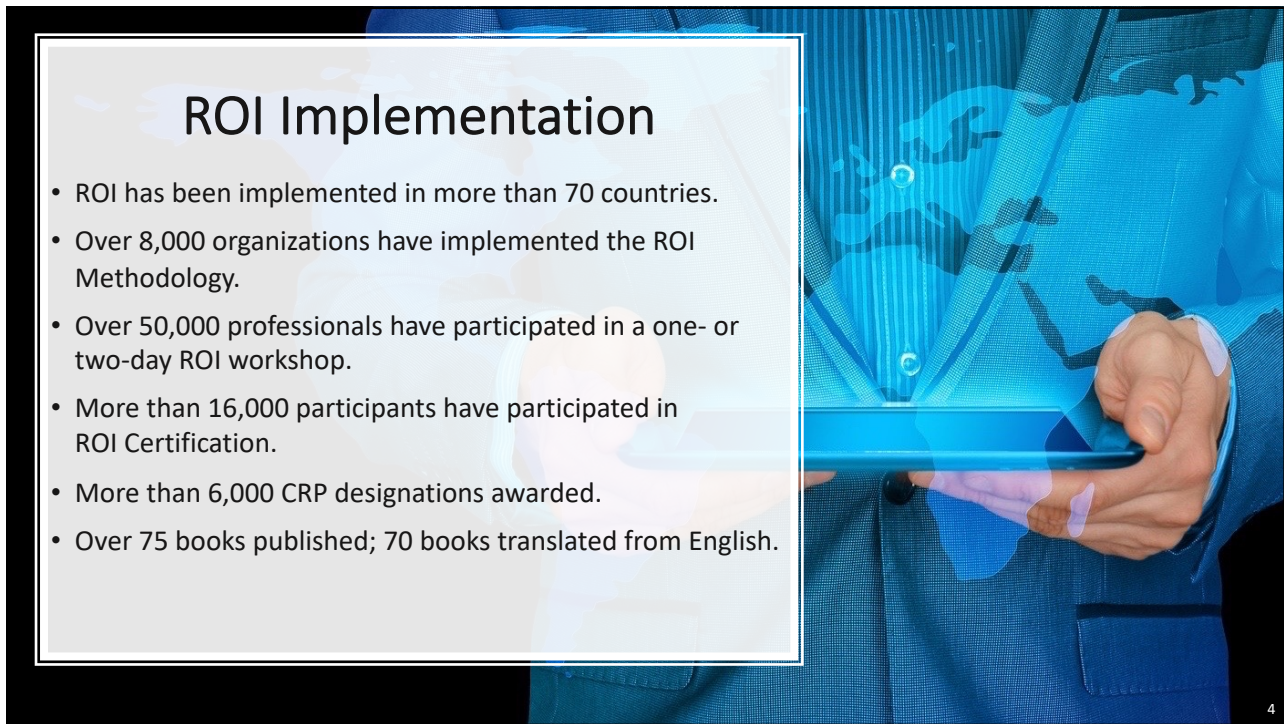
ROI INSTITUTE®

The ROI Methodology®

- Most used evaluation system in the world
- Endorsed by United Nations
- Endorsed by 26 federal governments
- Used by over 300 health care systems
- Used by over 150 colleges and universities
- Used by three-fourths of Fortune 500 organizations
- Used by major foundations such as the Gates Foundation

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ROI Implementation

- ROI has been implemented in more than 70 countries.
- Over 8,000 organizations have implemented the ROI Methodology.
- Over 50,000 professionals have participated in a one- or two-day ROI workshop.
- More than 16,000 participants have participated in ROI Certification.
- More than 6,000 CRP designations awarded.
- Over 75 books published; 70 books translated from English.

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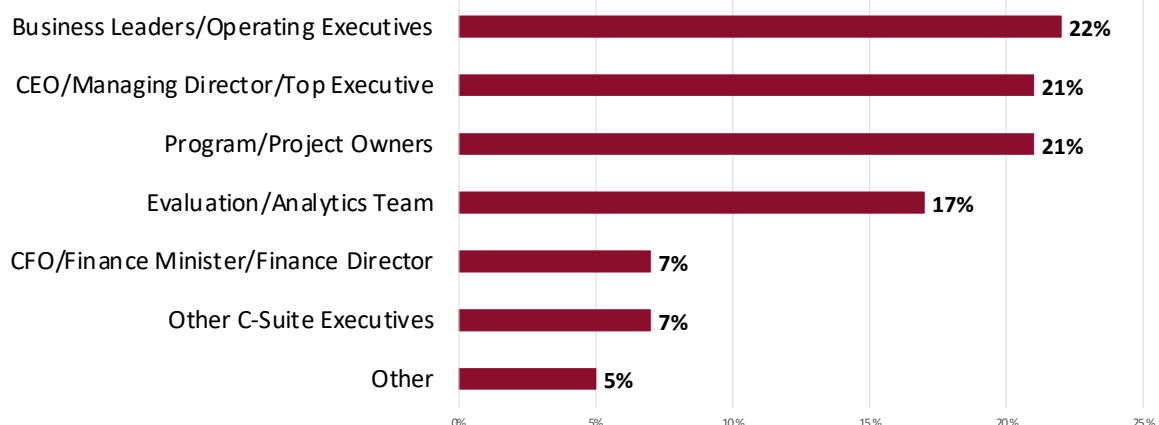
- Human Resources/Human Capital
- Training/Learning/Development
- Leadership/Coaching/Mentoring
- Knowledge Management/Transfer
- Recognition/Incentives/Engagement
- Work Arrangement/Systems
- Change Management/Culture
- Talent Management/Retention
- Policies/Procedures/Processes
- Technology/Systems/IT
- Meetings/Events/Conferences
- Marketing/Advertisement/Promotion
- Organization Development/Consulting
- Project Management Solutions
- Quality/Six Sigma/Lean Engineering
- Communications/Public Relations
- Public Policy/Social Programs
- Creativity/Innovation
- Ethics/Integrity
- Safety/Health/Fitness Programs
- Environment/Sustainability
- Healthcare Initiatives
- Schools/Colleges/Universities
- Public Sector/Nonprofits
- Faith-Based Programs
- Compliance/Risk Management

ROI is Appropriate For Many Fields

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Who drives ROI in organizations?



n = 246

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The ROI Methodology is Designed For:

- Functional managers who design and implement projects.
- Clients and senior management who request and approve projects.
- Researchers and evaluators who validate or teach evaluation approaches.

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What is your experience with ROI? (Select all that apply.)

- A. No experience with it.
- B. It's been suggested, but no action has been taken.
- C. I have attempted it.
- D. I have conducted an ROI study.
- E. I wish ROI would go away.

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ROI Methodology Levels of Evaluation

Levels of Evaluation	Measurement Focus	Typical Measures
0. Inputs & Indicators	The input into the project in terms of scope, volume, efficiencies, costs	Participants, Hours, Costs, Timing
1. Reaction & Planned Action	Measures participant satisfaction and captures planned actions, if appropriate	Relevance, Importance, Usefulness, Appropriateness, Intent to use, Motivation to take action
2. Learning & Confidence	Measures changes in knowledge, skills, and attitudes	Skills, Knowledge, Capacity, Competencies, Confidence, Contacts
3. Application & Implementation	Measures changes in behavior or actions	Extent of use, Task completion, Frequency of use, Actions completed, Success with use, Barriers to use, Enablers to use
4. Business Impact	Measures changes in business impact variables	Productivity, Revenue, Quality, Time, Efficiency, Customer Satisfaction, Employee Engagement
5. Return on Investment	Compares project benefits to the costs	Benefit-Cost Ratio (BCR), ROI%, Payback Period

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What is ROI?

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

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



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What is ROI?

$$\text{BCR} = \frac{\$750,000}{\$425,000}$$

$$\text{ROI} = \frac{\$750,000 - \$425,000}{\$425,000} \times 100$$



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What is ROI?

$$\text{BCR} = \frac{\$750,000}{\$425,000} = 1.76:1$$

$$\text{ROI} = \frac{\$750,000 - \$425,000}{\$425,000} \times 100 = 76\%$$



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Measurement Targets

How are users evaluating?

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

What is your status?

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Characteristics of Programs Suitable for Impact and ROI



Cost of the program



Linkage of program to operational goals and issues



Importance of program to strategic objectives



Top executive interest in the evaluation



Visibility of the program



Size of target audience



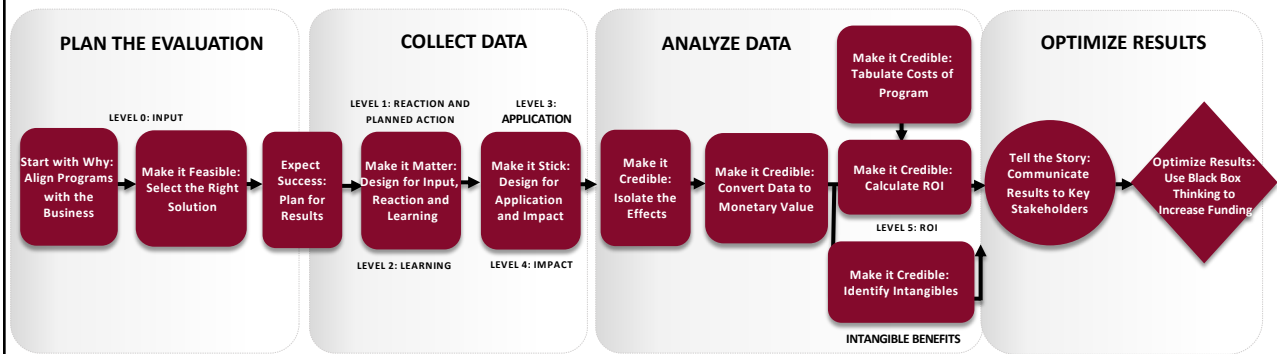
Investment of time required

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The ROI Methodology® Process Model

Designing for the Delivery of Business Results



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Guiding Principles

1. When conducting a higher-level evaluation, collect data at lower levels.
2. When planning a higher-level evaluation, the previous level of evaluation is not required to be comprehensive.
3. When collecting and analyzing data, use only the most credible sources.
4. When analyzing data, select the most conservative alternative for calculations.
5. Use at least one method to isolate the effects of a project.
6. If no improvement data are available for a population or from a specific source, assume that little or no improvement has occurred.
7. Adjust estimates of improvement for potential errors of estimation.
8. Avoid use of extreme data items and unsupported claims when calculating ROI.
9. Use only the first year of annual benefits in ROI analysis of short-term solutions.
10. Fully load all costs of a solution, project, or program when analyzing ROI.
11. Intangible measures are defined as measures that are purposely not converted to monetary values.
12. Communicate the results of ROI Methodology to all key stakeholders.

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ROI Boot Camp Tips

- Adapt the content to your programs, projects, and situations. (This program is designed for a broad audience for all types of programs in all types of settings.)
- Stay focused and engaged—avoid distractions.
- Think about how you can apply the content in your work.
- Bring your issues, concerns, and questions to our post-session.



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Benefits of Implementing the ROI Methodology



- 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.
- Improve projects with process improvement.
- Identify inefficient projects that need to be redesigned or eliminated.
- Identify successful projects that can be implemented in other areas.

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What is the best way to learn the ROI Methodology?

1. Briefings
2. Awareness workshops
3. ROI Certification— a process involving:
 - Pework
 - Comprehensive learning program
 - Workbook, reference books, job aids
 - Group coaching
 - Feedback and approval of evaluation study
 - Right to use materials Internally
 - Certified ROI Professional® (CRP) designation
 - Lifetime access to ROI Institute resource library
 - Membership to ROI Network

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Access Resources

<https://roiinstitute.net/novartis-roi-boot-camp>



Questions?

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