



How to Become ROI Certified

Jack J. Phillips, Ph.D.

Chairman, ROI Institute, Inc.

Objectives

After attending this session, participants should be able to:

1. Describe the ROI Certification process.
2. Explain the value of becoming a Certified ROI Professional (CRP).
3. Identify the approaches to become a CRP.
4. Plan next steps to achieve certification.



Resources

APPLICATION GUIDE

The ROI Methodology® in 12 Easy Steps

A step-by-step guide for developing Impact and ROI studies for programs, projects, and solutions in the following areas:

- 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
- Compliance/Risk Management
- Organization Development/Restructuring
- Project Management
- Quality/Six Sigma
- Communication
- Public Policy/Strategy
- Creativity/Innovation
- Ethics/Integrity
- Safety/Health/Environment
- Healthcare Initiatives
- Schools/Colleges
- Public Sector/Non-Profit
- Faith-Based Programs

The ROI Methodology® is a balanced approach that generates six types of data:

- Reaction and Planned Action
- Learning
- Application and Implementation
- Impact
- Return on Investment
- Intangibles

The process includes a step to isolate the effect of the program, or solution.

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Patricia Pulliam Phillips, PhD and Jack J. Phillips, PhD

Value for Money

Measuring the Return on Non-Capital Investments



Analytics in Action

ROI Case Studies
Volume I

ROI INSTITUTE®



How to Become ROI Certified

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Why are you interested in ROI?

(Select all that apply.)

- ☐ Top executives require impact and ROI. I must pursue this.
- ☐ I have pressure to justify my budget. I need to pursue this.
- ☐ I know I will need to demonstrate more value in the future.
- ☐ I want to show increased accountability for our expenditures.
- ☐ I want to experiment with and explore new techniques to measure program success.

The ROI Methodology®

- Most used evaluation system in the world
- Endorsed by United Nations with a UN General Assembly resolution in 2008
- 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

ROI Implementation

- ROI has been implemented in more than 70 countries.
- Over 26 federal governments have adopted the ROI Methodology.
- Over 6,000 organizations have implemented the ROI Methodology.
- Over 30,000 professionals have participated in two-day ROI skill building workshops.
- More than 16,000 participants have completed ROI Certification.
- More than 6,000 CRP designations awarded.
- Over 75 books published; 70 books translated from English.

ROI Use Globally

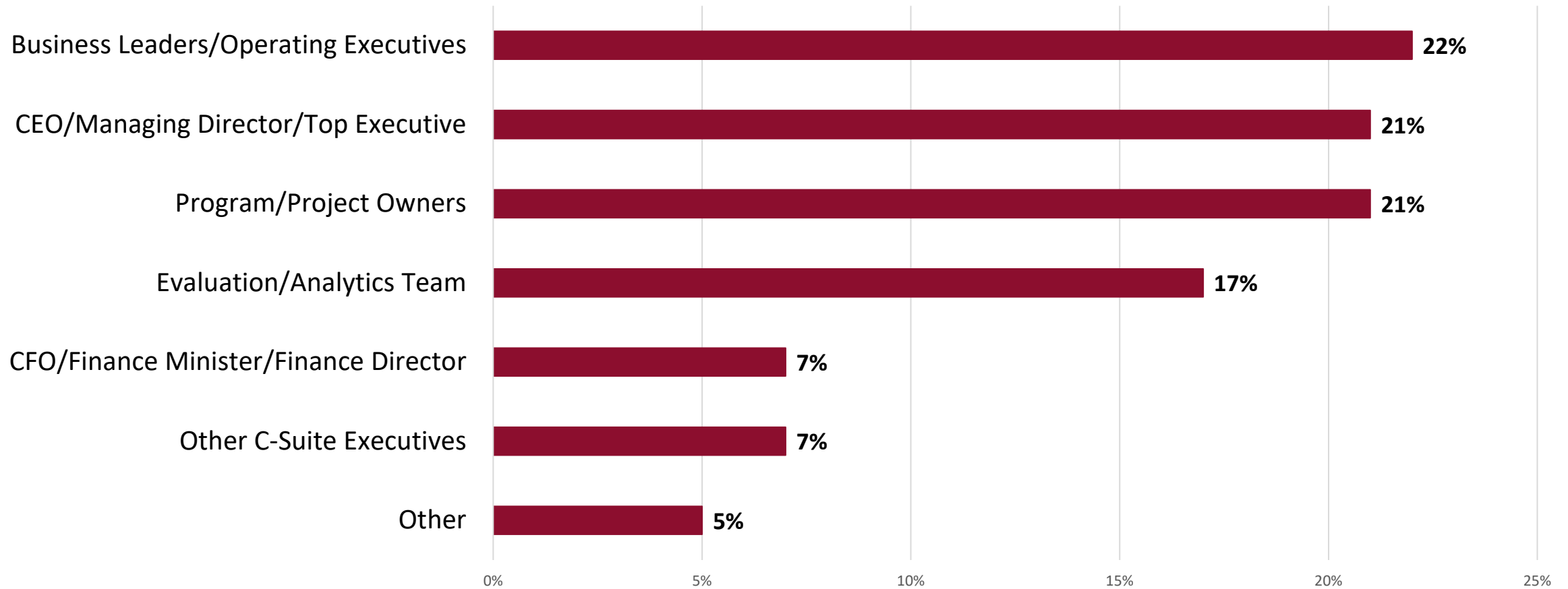
More than 26 federal governments have adopted the ROI Methodology including:

- Australia
- Bahrain
- Brazil
- Brunei
- Canada
- Chile
- Denmark
- Egypt
- Ireland
- Italy
- Kenya
- Malaysia
- Mexico
- Netherlands
- New Zealand
- Oman
- Poland
- Portugal
- Saudi Arabia
- Singapore
- South Africa
- Spain
- Taiwan
- Turkey
- United Kingdom
- United States
(12 agencies)

- 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

Who drives ROI in organizations?



n = 246



The ROI process is accepted by:

- Functional managers who design and implement projects
- Clients and senior management who request and approve projects
- Researchers and evaluators who validate projects



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

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

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

What is ROI?

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

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



What is ROI?

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

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



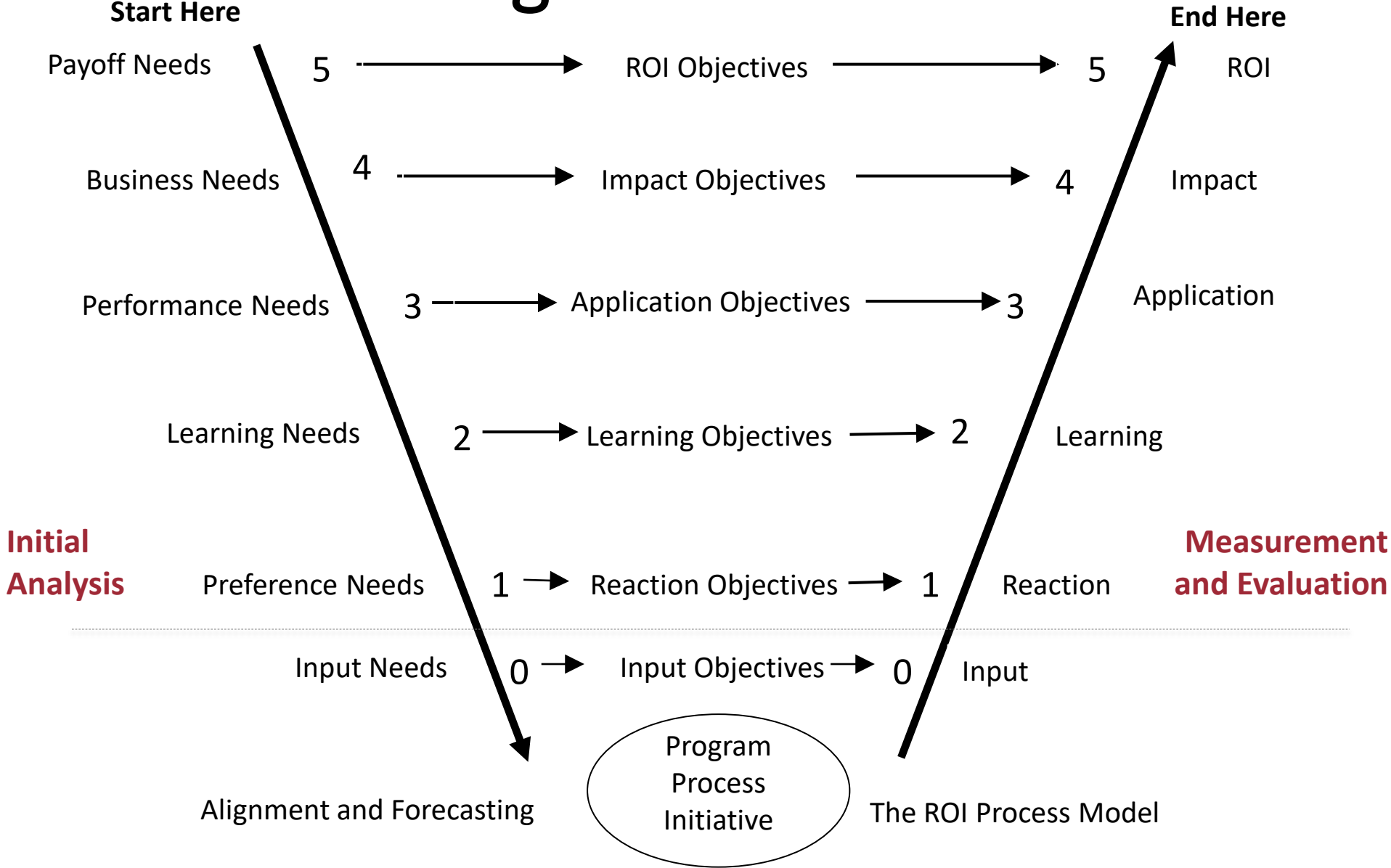
What is ROI?

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

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



Alignment Model





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?

What types of
projects are
best?

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

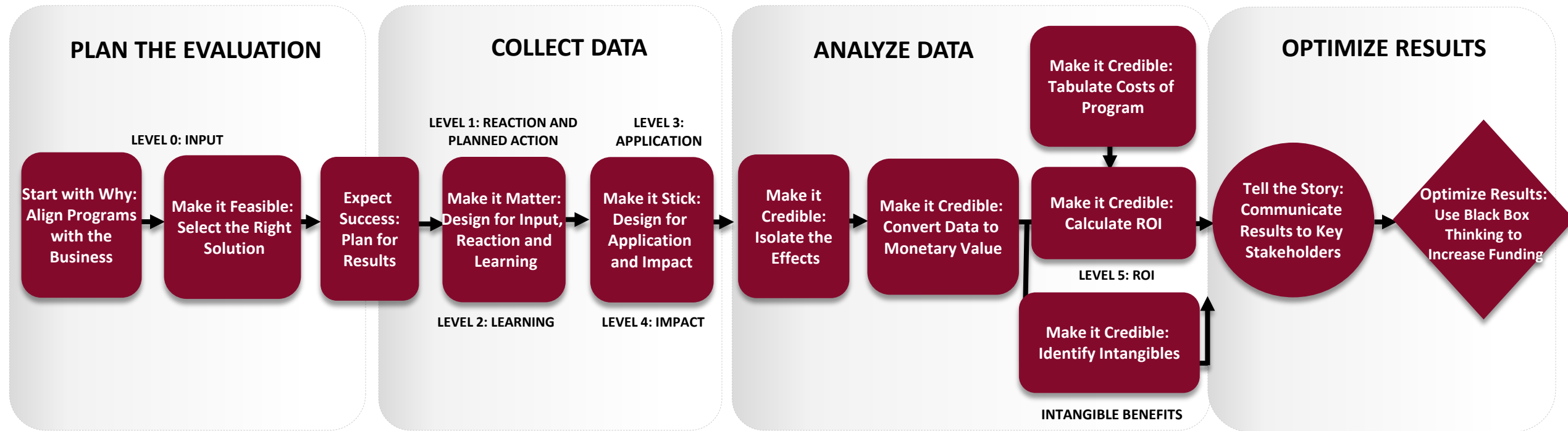
Visibility of the program

Size of target audience

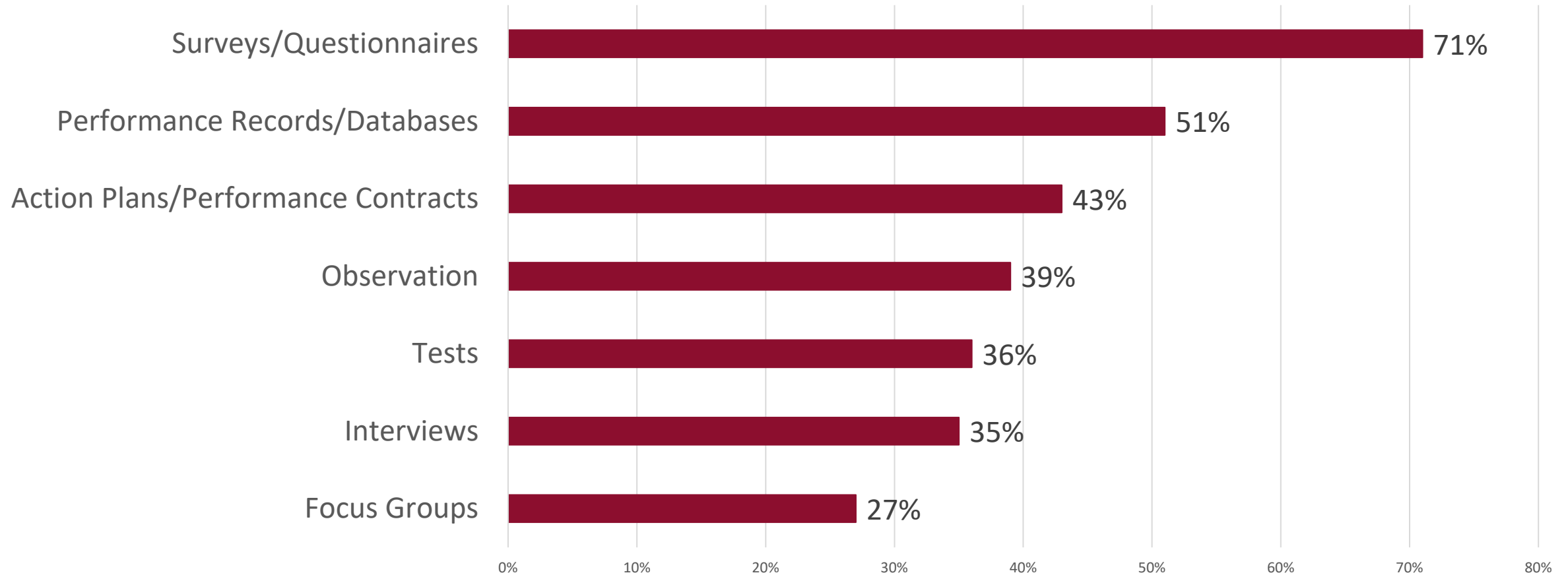
Investment of time required

The ROI Methodology® Process Model

Designing for the Delivery of Business Results

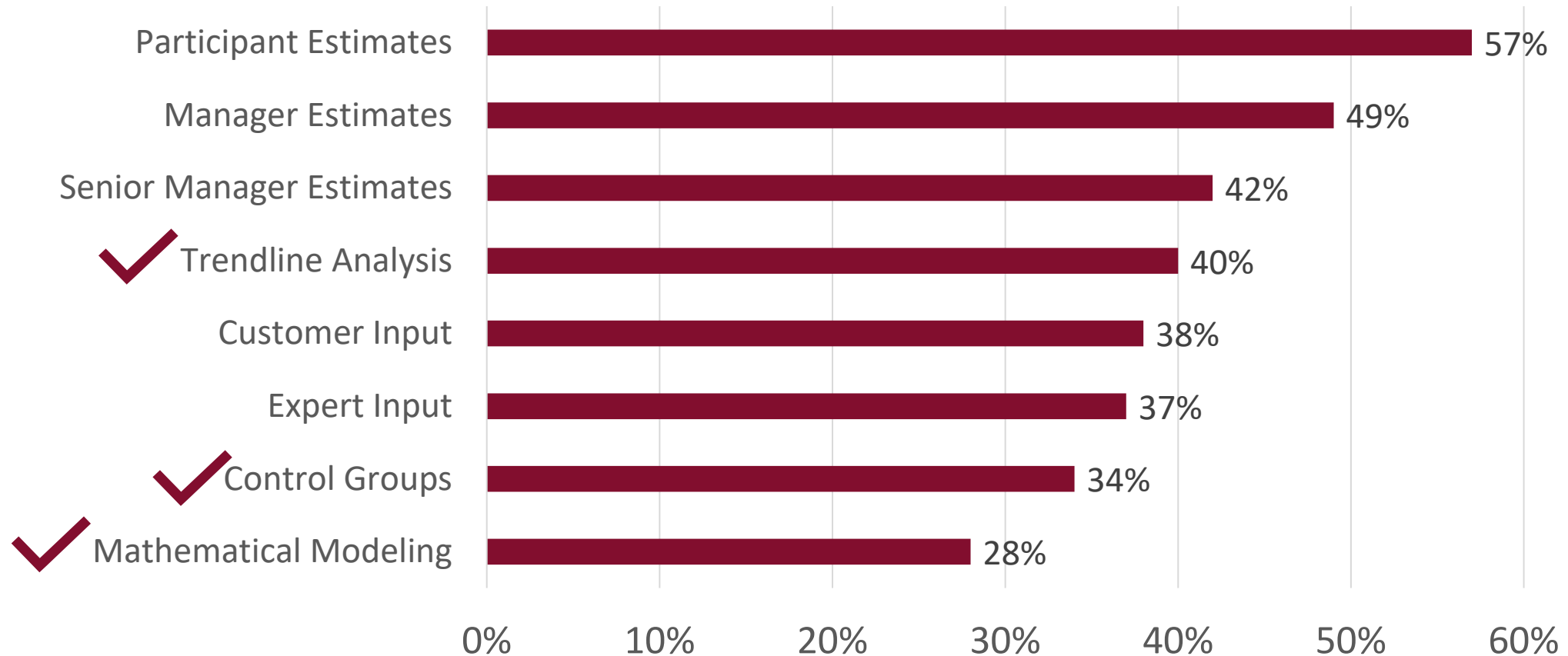


Data Collection Methods



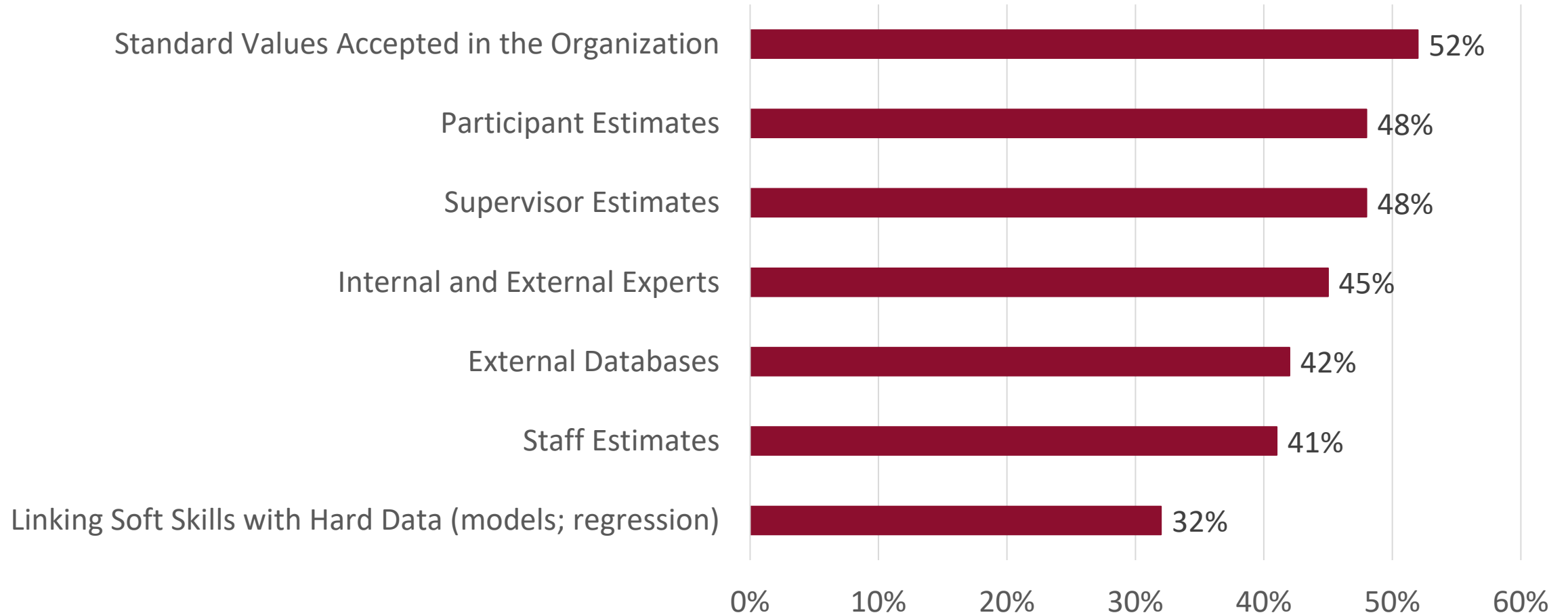
*Survey of Users, N = 246

Isolation Methods



*Survey of Users, N = 246

Data Conversion Methods



*Survey of Users, N = 246

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.

ROI Certification Components

Pework	Identify a project or program for ROI evaluation. Prepare for the basics.
Comprehensive Learning Program	Engage in content-rich, interactive sessions that focus on your evaluation project.
Materials	Utilize a 300-page action-oriented workbook, several reference books, and job aids.
Virtual Assistance through Group Coaching	Seek help with your ROI evaluation, receive review and approval of your ROI study.
ROI Academy Library	Access dozens of tools, templates, and job aids in members-only portal.
Right to Use Materials	Receive reproducible ROI materials to use internally with clients and colleagues.
Certified ROI Professional (CRP)	Join more than 6,000 others who hold this unique, sought-after credential.

What type of person is best suited to be a CRP?

1. No fear of numbers
2. Knows the organization(s)
3. Good problem solver
4. Detail-oriented
5. Good presenter
6. Good writer

Would you like an Assessment?





How long does it take to conduct a study?

If the data are available, most evaluation studies can be completed in one to three weeks.



How do you report and submit your evaluation study?

It ranges from a presentation in group coaching to a detailed report.



Benefits of Conducting ROI Studies

- 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.

ROI Myths

- ROI is too complex for most users.
- ROI is too expensive, consuming too many critical resources.
- If senior management does not require ROI, there is no need to pursue it.
- ROI is a passing fad.
- ROI is too subjective.
- ROI is for post-analysis only.



A glowing lightbulb hangs from a cord in the foreground, casting a warm light. In the background, a group of people are seated around a table in a meeting room, working on documents and laptops. The background is blurred, emphasizing the lightbulb and the text on the right.

What is the best way to learn the ROI methodology?

1. Briefings
2. Awareness workshops
3. ROI Certification— a comprehensive process involving:
 - Prework
 - Intensive learning program to complete ROI study
 - Workbook, reference books, job aids
 - Weekly live coaching sessions
 - Feedback and approval of study
 - Right to use materials Internally
 - Certified ROI Professional® (CRP) designation
 - Access to ROI Institute resource library



What are your concerns about the ROI Methodology?

- ☐ No concerns.
- ☐ It's too complicated.
- ☐ It takes too long.
- ☐ It's too expensive.
- ☐ No one is asking for this.



The ROI Methodology®
in 12 Easy Steps

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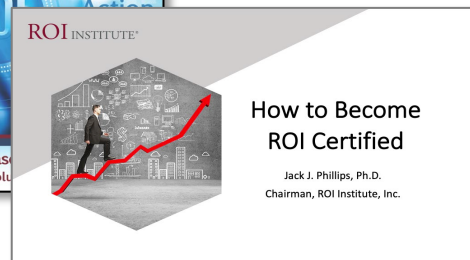
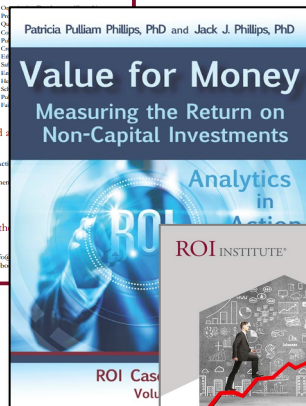
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- Recruitment/Retention/Engagement
- Work Management Systems
- Change Management/Culture
- Talent Management/Recruitment
- Policy/Procedures/Processes
- Technology Systems/IT
- Marketing/Events/Communications
- Marketing/Advertising/Promotions
- Compliance/Risk Management

The ROI Methodology® is a balanced scorecard that generates six types of data:

- Reaction and Planned Action
- Learning
- Application and Implementation
- Impact
- Return on Investment
- Intelligence

The process includes a step to isolate the program, or solution.

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Scan the QR code or [click here](#) to access resources from today's session.

ROI CERTIFICATION®

SCHEDULED EVENTS

November 8-12, 2021 — Milwaukee, WI

November 8-19, 2021 — Live Virtual

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.

Email: info@roiinstitute.net

Enroll: <http://bit.ly/ROICertification>

Call: +1 205.678.8101

ROI INSTITUTE®



Live Virtual ROI Boot Camp

February 8, 2022

ROI INSTITUTE®
ONLINE ACADEMY

During ROI Boot Camp, participants will learn about:

- The benefits and barriers of using ROI
- The five levels of evaluation
- Data at multiple levels
- Isolating the effects of your programs
- The 12 guiding principles
- Converting data to money
- The 12 steps in the ROI Methodology
- Calculating ROI using the ROI Methodology

<https://www.roiinstituteacademy.com/live-bottomline-on-roi-boot-camp>



This activity has been approved for 5 HR (General) re-certification credit hours toward aPHR™, PHR®, PHRca®, SPHR®, GPHR®, PHRi™ and SPHRi™ re-certification through HR Certification Institute® (HRCI®)



This Boot Camp has been pre-approved by Training Industry for 5 continuing education recertification hours toward the Certified Professional in Training Management credential.



Questions?

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