

Case Study Requests

Supplying Copies of Case Studies from the ROI Institute

The Issue

On a routine basis we are asked to provide a copy of a case study we have collected. These studies cover a variety of topics. The most common types are published and are readily available. Others are less common, but still represent important topics, such as ROI in culture, ROI in wellness and fitness programs, ROI in shared services, or ROI in outsourcing, among others. As the ROI Methodology™ has been applied in a myriad of practices, we have seen case studies involving almost any issue imaginable. However, we are unable to immediately send copies to our colleagues for several reasons. Let us explain.

The Development of Case Studies

To become certified in the ROI Methodology, candidates must conduct an impact study on a project of their choice and submit it to the ROI Institute. To date, about 4,000 individuals have attended a five-day program (or a six-month online program). About half of these individuals have submitted case studies as part of their certification. Approximately 20 five-day ROI Certification courses are offered to the public each year. While another ten are conducted for private organizations. Each month, a new group begins the six-month online certification, where a study is completed at the end of six months. In addition, Capella University has a certification option within its Ph.D. and Master's programs. When this course is taken, students must complete a project to receive credit for the course.

At this pace, about 400 to 500 individuals are completing certification, annually. With a 50-60% certification completion rate, about 300 case studies are reviewed by our team each year. Five members of the ROI Institute's senior staff have authority to review the case studies against preset criteria to determine that each one meets a comprehensive standard. If it does not, the case study is returned for revisions. This is a high volume of studies, with the numbers growing each year.

In addition, we have almost 100 fulltime ROI Consultants, globally, who are directly involved in the development of many case studies. This increases the volume of studies reviewed by the ROI Institute, University faculty, and other professional colleagues. This means our Institute has the opportunity to read about 500 studies per year.

The Concern

There are several issues regarding the nature of this process that make it difficult to send you a case study. These cases are impact studies conducted by one or more individuals in an organization. These studies are considered confidential and proprietary. We do not have the right (nor do we ask for the right) to send them to other individuals. We respect the privacy of our clients. Therefore, we do not make an attempt to collect and distribute the studies to the public. Because of this, we have not collected and categorized these studies in a logical and convenient way. Some are maintained in the files of the individuals reviewing the case studies. Others are returned to the original owners, while many are stored in various locations in our offices. Unfortunately, they are not organized for easy retrieval. For these reasons, it would be difficult to send a case study to all who request one.

The Good News

However, the good news is that occasionally people send us a case study with permission to publish it. These case studies are sometimes available. We have published about 200 case studies in books, magazines, or trade journals in the USA alone. There may be a chance that we have case studies on particular topics available. Also, when we have unusual and interesting case studies that are reviewed in detail, we may be able to recall them and cite the essential elements of the case without revealing any confidential client information.

When conducting workshops and speaking at conferences, we are often asked for a case study on a particular topic. In our eagerness to help these individuals, we will sometimes try to locate one. We will quickly review the published case studies and those we have permission to use. Unfortunately, we are not always able to respond to all requests. This does not mean we are not willing. The nature of case development, the dynamics of the situation, and the sheer number of requests from our clients dictate our ability to share some studies. This is frustrating to some because we cannot always provide a specific study for a particular issue. For example, if someone asks if we have an ROI study for an orientation program for new engineers at a chemical plant in New Jersey, the odds are slim of having something that specialized.

Do You Really Need a Specific Case Study?

The ROI Methodology represents one of the most flexible processes ever developed. It fits into all types of programs and projects. Perhaps one of the case studies already published could be helpful for you. We also have some studies available for download on our Web site (www.roiinstitute.net). If this does not work, we would be happy to describe to you how an impact study could be developed for your situation. If you would like to discuss this, please let us know.

More Good News

We have made arrangements with our software provider to catalog case studies in the future. We have not worked out all the mechanics yet, but we plan to seek permission from case study authors to use them in our system. We anticipate a high participation rate. We also want to have a mechanism in place allowing us to solicit more case studies. Given the number of people certified to conduct case studies and their proven productivity in producing them, we estimate that roughly 5,000 impact studies are conducted each year. Stay tuned for further announcements.

In Summary

We understand how valuable these case studies can be in providing you with real-world examples of the ROI Methodology in practical use. We would be happy to provide you with our Booklist, which includes our collections of published case studies. To show for our appreciation, we are happy to provide a 20% discount toward the purchase of one of these casebooks.

Please keep in touch, and we will let you know how things develop in the future. Thank you for understanding.

Sincerely,
Jack & Patti Phillips