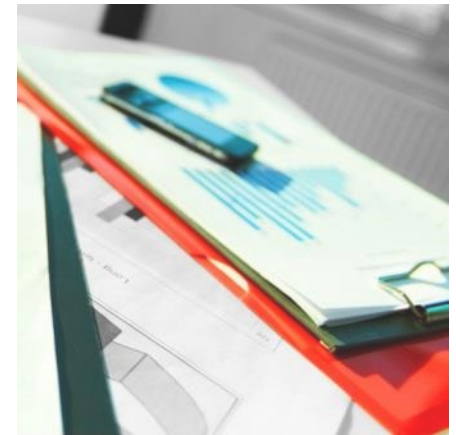


# *Reporting Results that Executives Will Love*

*with Jack Phillips, Ph.D.*

*ROI Institute*

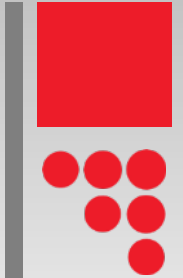


David Vance  
Executive Director

**CTR**  
Center for Talent Reporting

# *The Center for Talent Reporting*

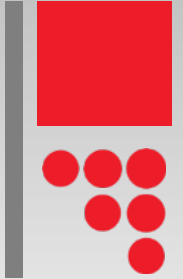
*The Home of Talent Development Reporting Principles (TDRp)*



- Established October 2012
  - » Not-for-profit, 501c(6) organization (used for trade associations)
- Mission
  - » Improve and standardize the **measurement, reporting, and management** of human capital to deliver significant business value
- Supported by partners and members
  - » ROI Institute is a founding partner
- CTR's focus:
  - » Adoption of standard measures
    - Effectiveness
    - Efficiency
    - Outcomes
  - » Adoption of standard reports
    - Program
    - Operations
    - Summary
  - » Run learning and HR like a business
    - Plan
    - Execute

# *CTR Week 2019*

## *February 18-22*



- **2019 Sixth Annual CTR Conference**

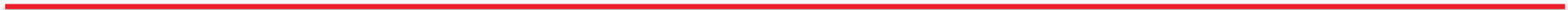
- » February 20 - 21 noon
- » Dallas
- » Focus on measurement, reporting and management of human capital
- » Honor Jack for his contributions to our field
- » Registration now open
- » See [ctrconference.com](http://ctrconference.com) for info

- **Two-day preconference workshops**

- » Measurement & Reporting Feb 18-19
- » The 6D's Feb 18-19

- **Four Post-conference workshops**

- » **Escape the Reporting Black Hole**
  - Facilitated by Peggy Parskey, CTR
  - February 21 pm
  - Improve use of L&D data
- » **Introduction to ROI**
  - Facilitated by Patti Phillips, ROI Institute
  - February 21 pm
  - Learn how you can show the value of learning
- » **Creating Your Measurement Strategy**
  - Facilitated by Dave Vance, CTR
  - February 22 am
- » **How to Engage Business Leaders with L&D Reporting**
  - Facilitated by John Mattox, MTM
  - February 22 am



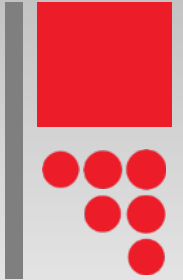
# *Learn More about the Center*



- Learn more and get implementation guidance at [www.CenterforTalentReporting.org](http://www.CenterforTalentReporting.org)
  - » Webinars and workshops
  - » Introduction to TDRp whitepapers
  - » Extensive measures library (over 700 measures)
  - » More than 70 sample statements and reports
  - » Guidance on implementation
- Contact for more information:
  - » Dave Vance: [DVance@CenterforTalentReporting.org](mailto:DVance@CenterforTalentReporting.org)
  - » Peggy Parskey: [PParskey@CenterforTalentReporting.org](mailto:PParskey@CenterforTalentReporting.org)



# Jack Phillips



Dr. Jack J. Phillips is Chairman of ROI Institute and is a world-renowned expert on accountability, measurement, and evaluation. He provides consulting services for Fortune 500 companies and major global organizations. On three occasions, Meeting News named him one of the 25 Most Powerful People in the Meetings and Events Industry based on his work on ROI, and the American Society for Training and Development gave him its highest award, Distinguished Contribution to Workplace Learning and Development for his work on ROI.

The author or editor of more than 100 books, he conducts workshops and presents at conferences all over the world. His most recent publication is titled *The Value of Innovation: Knowing, Proving, and Showing the Value of Innovation and Creativity* (Wiley, 2018).

# Reporting Results that Executives Will Love

JACK J. PHILLIPS, PH.D.  
CHAIRMAN





# Objectives

After completing this session, participants should be able to:

- Identify the data sets that top executives want to see.
- Modify routine data collection to focus more on the executive-friendly data sets.
- Create an executive-friendly, talent development scorecard.



# Which of these are true?

1. Executives place more value on hard skills than soft skills.
2. Learning and development programs are rarely measured at the level desired by executives.
3. With their actions, executives perceive learning as a cost and not an investment.
4. Most learning and development providers do not have data showing that they make a difference in the organization.



# Changing Paradigms for Learning

	<b>Traditional</b>	<b>Emerging</b>
	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	Performance Consulting
✓	Reaction and Learning	Impact and ROI

# The issues for communicating with top executives:

- Why?
- What?
- How?
- How much?
- When?
- Where?

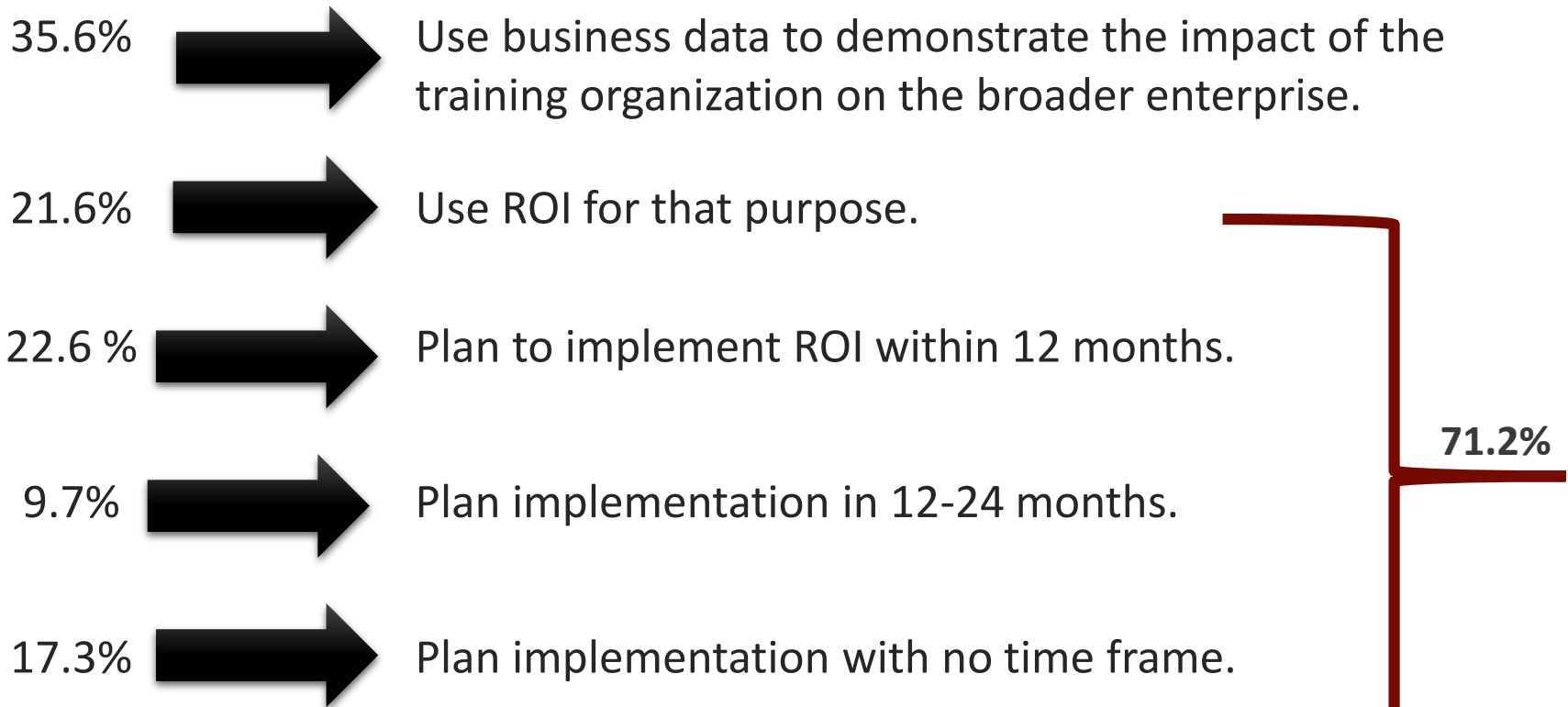


# What CEOs Want

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

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

# The Promise: CLOs Use or Plan to Use ROI



(N=335)

# Recent Data

**“Ultimately, the success of any program is based on whether it improves business results.”**

**Training Top 10 Hall of Fame  
– May 2017**

**“The Best Practice Report features three case studies—two of them are on ROI.”**

**Training Top 10 Hall of Fame  
– May 2018**

The background features a collage of financial and time-related icons: a round clock in the top left, a calendar grid in the center, stacks of gold coins in the bottom left, and a large 3D percentage sign in the bottom right. The entire scene is set against a dark, semi-transparent background.

# WHAT IS VALUE?

# The Value Chain

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

Must take a step to Isolate the Effects

\*Best Practice: Percent of Programs Evaluated at this level each year.



# Exercise

**Write one sentence to describe the success of learning and talent development.**





# What's Your Business?

The Possible Measures						
Your choice	Value Description	Rank	Measure Now	Executive Rank	Percent Measured Now	Best Practice
	"Serve the largest number of people with the least amount of disruption and cost."					100%
	"Participants are engaged, enjoy the programs, and see their experience as valuable."					100%
	"Participants are learning the latest information and skills to make this a great organization."					90%
	"Participants leave the center, take action, use the content, and make important changes."					30%
	"Participants are driving important business measures and having an impact in their work units and the organization."					10%
	"Participants and the organization have a positive return on the investment of their time and the resources of the center."					5%

# Status of Measurement

Level	Measurement Category	Current Status*	Best Practice	Comments About Status
0	<b>Inputs/Indicators</b> Measures the number of programs, participants, audience, costs, and efficiencies	100%	100%	This is being accomplished now
1	<b>Reaction and Planned Action</b> Measure reaction to, and satisfaction with, the experience, content, and value of program	100%	100%	Need more focus on content and perceived value 79% †

\* Percent of OD Projects Evaluated at This Level

† Best Practice Benchmarking (user for 5 plus years)

# Status of Measurement

Level	Measurement Category	Current Status*	Best Practice	Comments About Status
2	<b>Learning</b> Measures what participants learned in the program— information, knowledge, skills, and contacts (takeaways from the program)	30-40%	80-90%	Must use simple learning measures 54% †
3	<b>Application</b> Measures progress after the program— the use of information, knowledge, skills, and contacts	10%	30%	Need more follow-up 31% †

\* Percent of OD Projects Evaluated at This Level

† Best Practice Benchmarking (user for 5 plus years)

# Status of Measurement

Level	Measurement Category	Current Status*	Best Practice	Comments About Status
4	<b>Impact</b> Measures changes in business impact variables such as output, quality, time, and cost-linked to the program	5%	10%	This is the connection to business impact 14.4% †
5	<b>ROI</b> Compares the monetary benefits of the business impact measures to the costs of the program	1%	5%	The ultimate level of evaluation 4.3% †

\* Percent of OD Projects Evaluated at This Level

† Best Practice Benchmarking (user for 5 plus years)



# Exercise

What concerns do you have about these percentages?

# Data Collection During and After Program

Method	Type of Data			
	Level 1	Level 2	Level 3	Level 4
Surveys	✓	✓	✓	
Questionnaires	✓	✓	✓	✓
Observation	✓	✓	✓	
Interviews	✓	✓	✓	
Focus Groups	✓	✓	✓	
Tests/Quizzes		✓		
Demonstrations		✓		
Simulations		✓		
Action Planning/ Improvement Plans			✓	✓
Performance Contracting			✓	✓
Performance Monitoring				✓

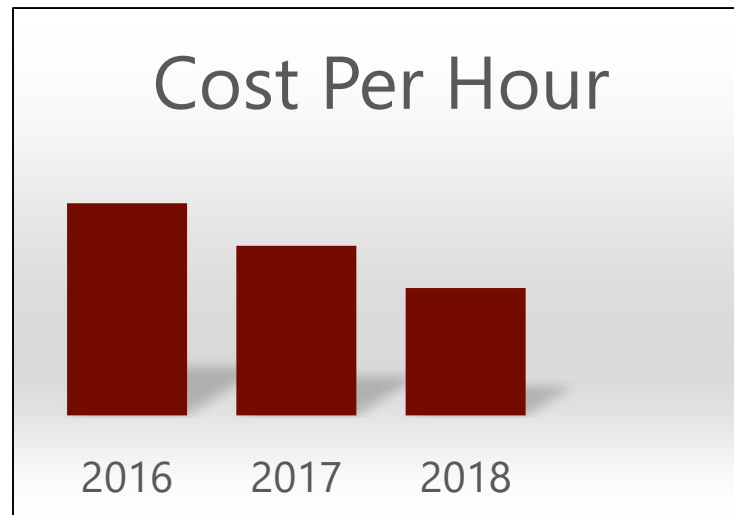
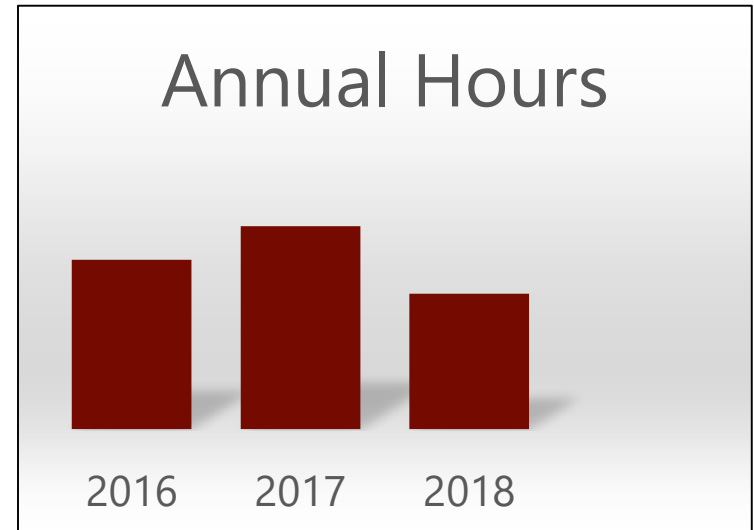
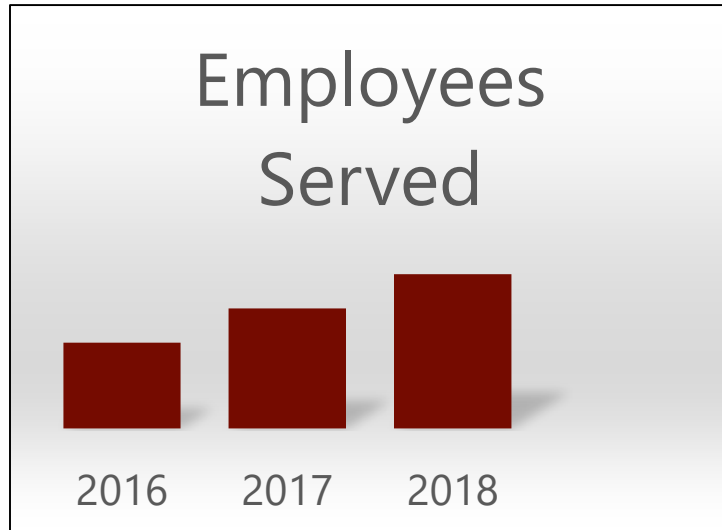


# An Executive Friendly Learning Scorecard

## 0 — Inputs

1. Number of employees
2. Hours per employee
3. Cost per employee

# 0 — Inputs





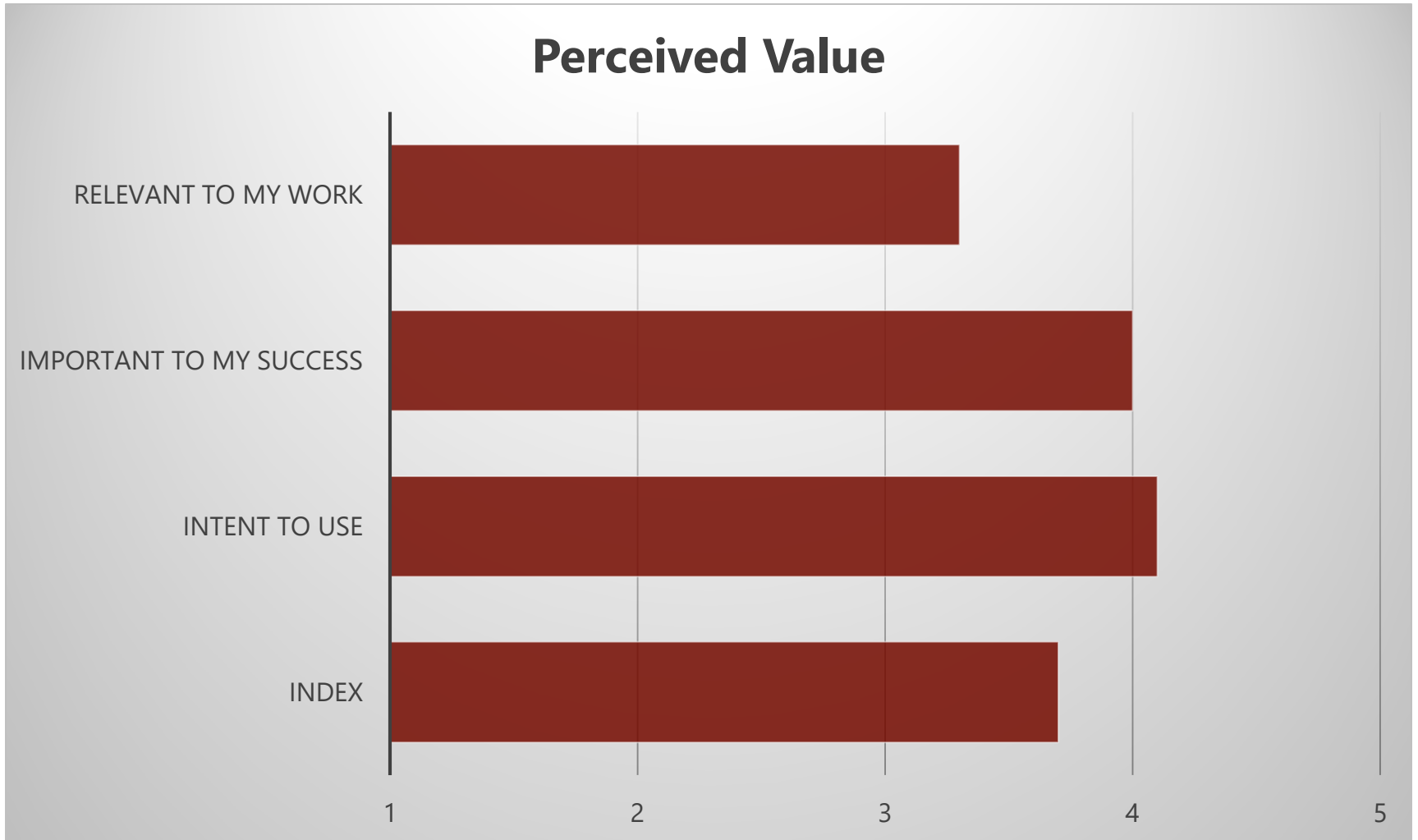


# **An Executive Friendly Learning Scorecard**

## **1 — Reaction**

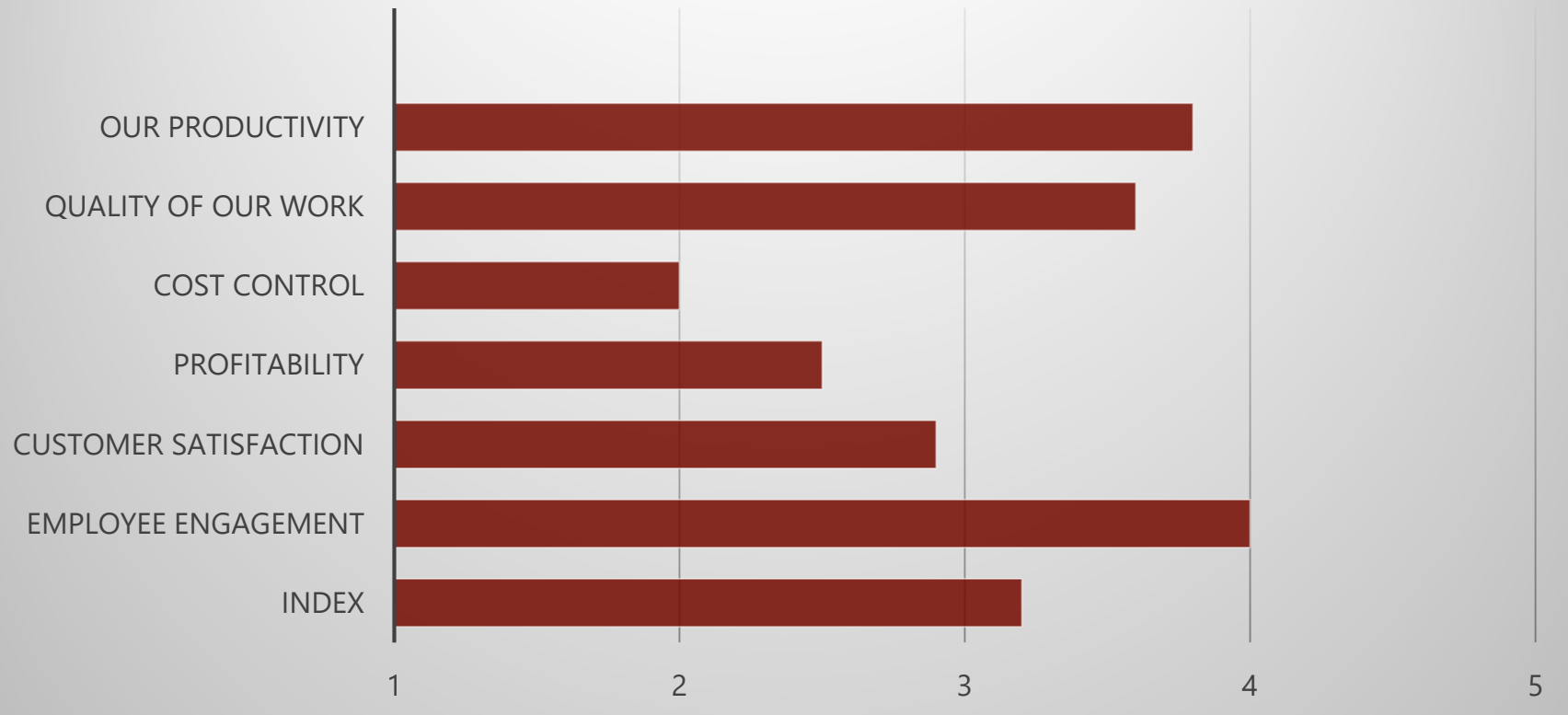
1. Perceived value (index)
2. Business impact linkage

# Reaction



# Business Impact Linkage

To what extent will this program influence the following measures:



1- No influence  
significant influence

2- Some influence

3- Moderate influence

4 – Significant influence

5 – Very



# **An Executive Friendly Learning Scorecard**

## **2 — Learning**

1. Percent of programs evaluated at this level
2. Learning index

## **3 — Application**

1. Percent of programs evaluated at this level
2. Application index

## **4 — Business Impact**

1. Percent of programs evaluated at this level
2. Business impact linkage



# **An Executive Friendly Learning Scorecard**

## **5 — ROI**

1. Percent of programs evaluated at this level

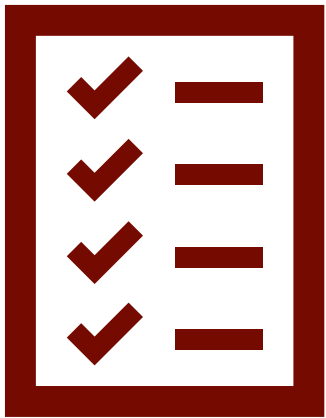
## **Intangibles**

1. Top intangibles

## **Awards**

1. Industry and professional awards

# Need assistance?



For more information on  
how to develop an  
**Executive Friendly  
Scorecard**

Email: [Kylie@roiinstitute.net](mailto:Kylie@roiinstitute.net).



# Presenting an Impact Study to Top Executives

## Purpose of the Meeting

- Create awareness and understanding of ROI.
- Build support for the ROI methodology.
- Communicate results of study.
- Drive improvement from results.
- Cultivate effective use of the ROI methodology.



# Presenting an Impact Study to Top Executives

## Use These Ground Rules

- Do not distribute the impact study until the end of the meeting.
- Be precise and to the point
- Avoid jargon and unfamiliar terms
- Spend less time on the lower levels of evaluation data
- Present the data with a strategy in mind





# Presenting an Impact Study to Top Executives

## Follow This Presentation Sequence

- Describe the program and explain why it is being evaluated
- Present the methodology process
- Present the reaction and learning data
- Present the application data
- List the barriers and enablers to success
- Address the business impact



# **Presenting an Impact Study to Top Executives**

## **Follow This Presentation Sequence**

- Show the costs
- Present the ROI
- Show the intangibles
- Review the credibility of the data
- Summarize the conclusions
- Present the recommendations



# Example of a One-Page Executive Summary

Leadership  
Development:  
Precision  
Manufacturing

**The Leadership Challenge**

- Four-day workshop with actions plans and support tools
- Each participant selects 2 KPIs to improve using the competencies with his or her team.

**Target:**  
**First-Level Managers 970**  
**Sample 72**  
**(18 managers, 4 groups)**

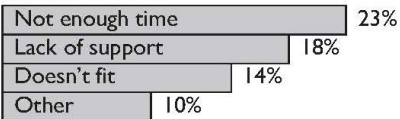
**Reaction – Objectives Met**

Relevance	✓
Importance	✓
Intent to use	✓

**Application Objectives on a 5-point scale**

Extent of use	4.3
Frequency of use	4.5
Success with use	3.9

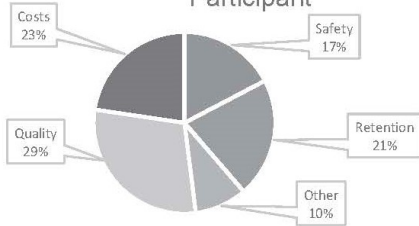
**Barriers**



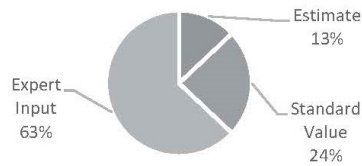
Learning Objectives Met Pre- Post- Improvements	
1. Communicate values and beliefs	48%
2. Focus on key values through actions	57%
3. Build collaboration teamwork and trust	42%
4. Strengthen others' abilities to excel	69%
5. Inspire others to share a common vision	53%
6. Recognize the accomplishments of others	67%

Methods of Isolation: Participant Allocation Adjusted for Error

**Impact Objectives  
Two Objectives for Each Participant**



**Method of Converting  
Data to Money**



To receive the full version, email:  
[Kylie@roiinstitute.net](mailto:Kylie@roiinstitute.net)

Costs – Direct \$355,370  
 Indirect – Prorated \$9,890  
 Total \$365,260

**Total Monetary Benefits = \$538,640**

**Intangibles**

Engagement

Satisfaction

Stress

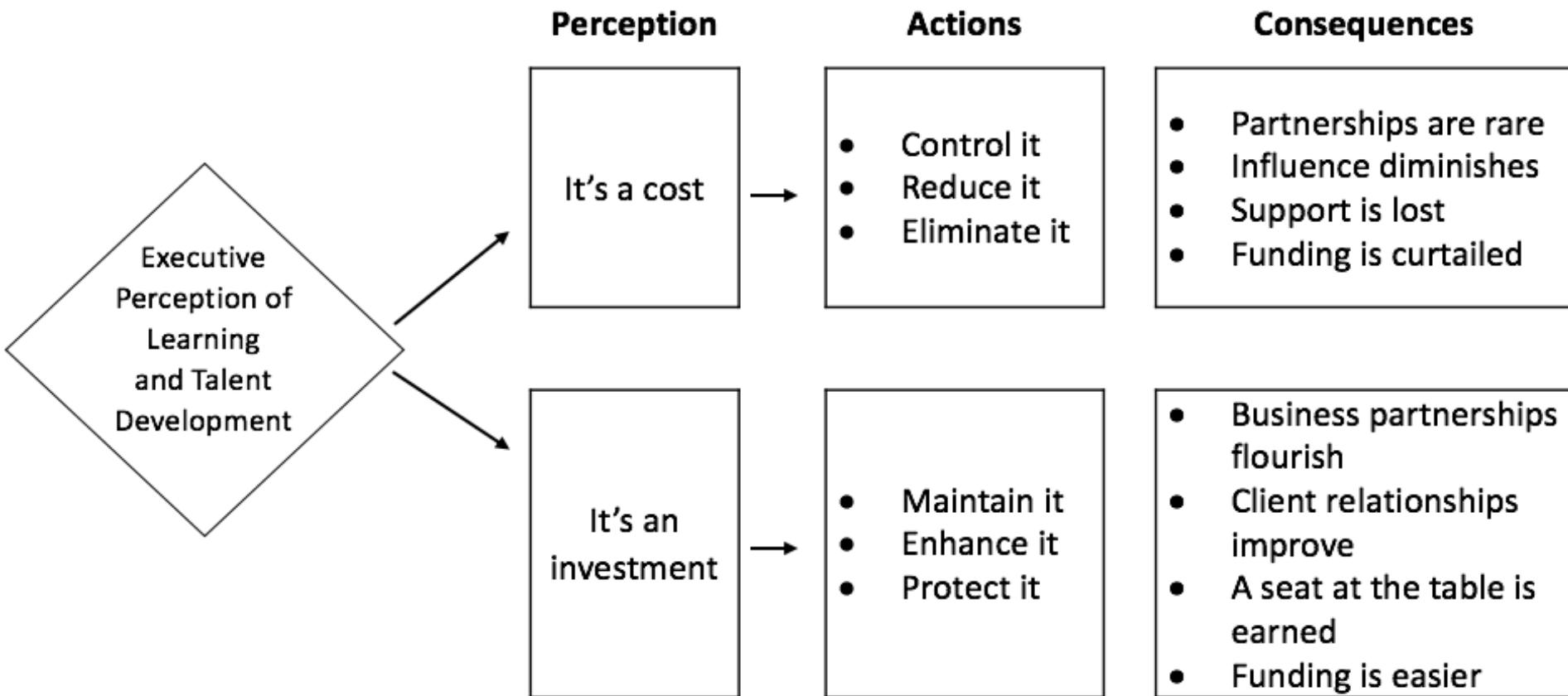
**BCR = 1.47**

**ROI = 47%**

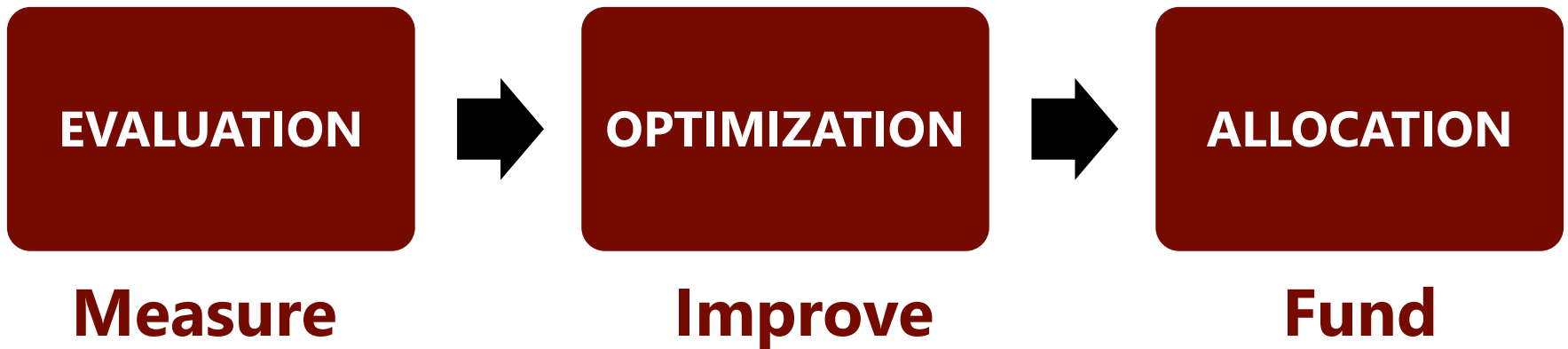
# Exercise

Do your top executives see learning and talent development as a cost or investment?

# Costs Versus Investment Perception



# Use Results to Optimize and Allocate





# Summary — Communicating to Top Executives

- Why? – To drive influence, support, commitment, and budget
- What? – Application, impact, ROI
- How? – Briefings, meetings, routine reports
- How much? – Small amounts, quick reads
- When? – After major events and routine reporting
- Where? – Conference rooms, large meetings, periodic reports



# Design for Results: Use Design Thinking to Deliver Business Value

- **Start with Why:** Alignment Programs with the Business
- **Make it Feasible:** Selecting the Right Solution
- **Expect Success:** Designing for Results
- **Make it Matter:** Designing for Input, Reaction, and Learning
- **Make it Stick:** Designing for Application and Impact
- **Make it Credible:** Measuring Results and Calculating ROI
- **Tell the Story:** Communicating Results to Key Stakeholders
- **Optimize Results:** Using Black Box Thinking to Increase Funding

# Remember, when it comes to delivering and communicating results from learning and talent development:



- Hope is not a strategy.
- Luck is not a factor.
- Doing nothing is not an option.

**Change is inevitable. Progress is optional.**



# *Thank you!*



**Jack J. Phillips, Ph.D.**  
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**Visit us online:**  
[www.roiinstitute.net](http://www.roiinstitute.net)

**Connect with us on:**



# 2019 US ROI Certification® Events

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- 
- January 14-18, San Antonio, TX
  - February 18-22, Dallas, TX
  - February 25-March 1, Orlando, FL
  - March 11-15, Atlanta, GA
  - March 18-22, Phoenix, AZ
  - April 15-19, New Orleans, LA
  - May 13-17, Denver, CO
  - May 20-24, Washington, DC
  - June 24-28, San Diego, CA
  - September 9-13, Seattle, WA
  - October 7-11, Charlotte, NC

To Register: [roiinstitute.net/events/category/certifications/](http://roiinstitute.net/events/category/certifications/)

Call 205.678.8101



This program has been approved for 37.5 (HR General) Recertification Credit Hours toward PHR, SPHR and GPHR recertification through the HR Certification Institute (HRCI).

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