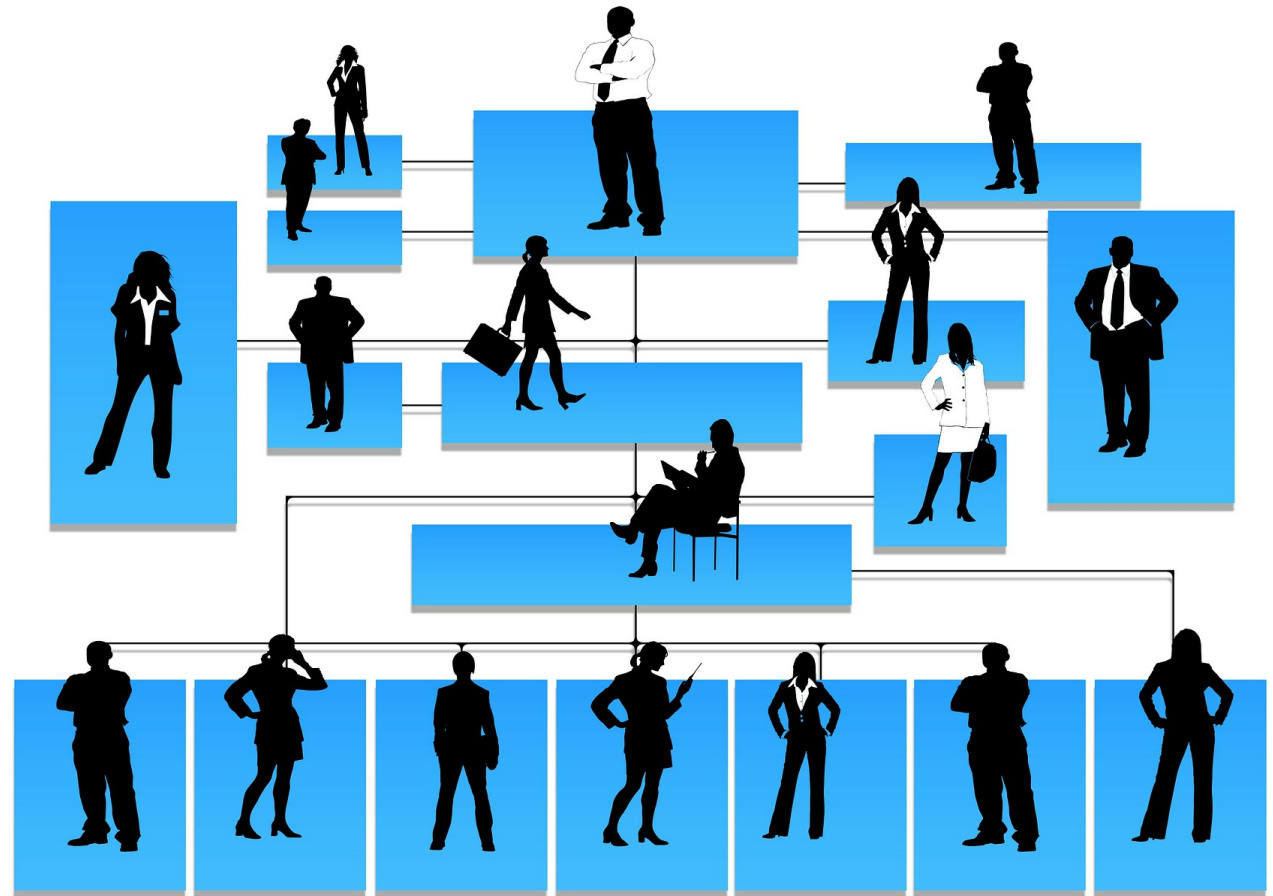


Results That Executives (and Others) Will Love

Patti P. Phillips, Ph.D.
Jack J. Phillips, Ph.D.
ROI Institute

**ISA's 2019
Annual Business Retreat**

ROI INSTITUTE®





Objectives

After completing this session, participants should be able to:

- Explore the data sets possible from learning and development, by categories, including ROI.
- Identify the categories that are desired by top executives and other key stakeholders.
- Explain how these measures are derived and developed.
- Pursue a plan to measure results and communicate results to different audiences.



Which of these are true?

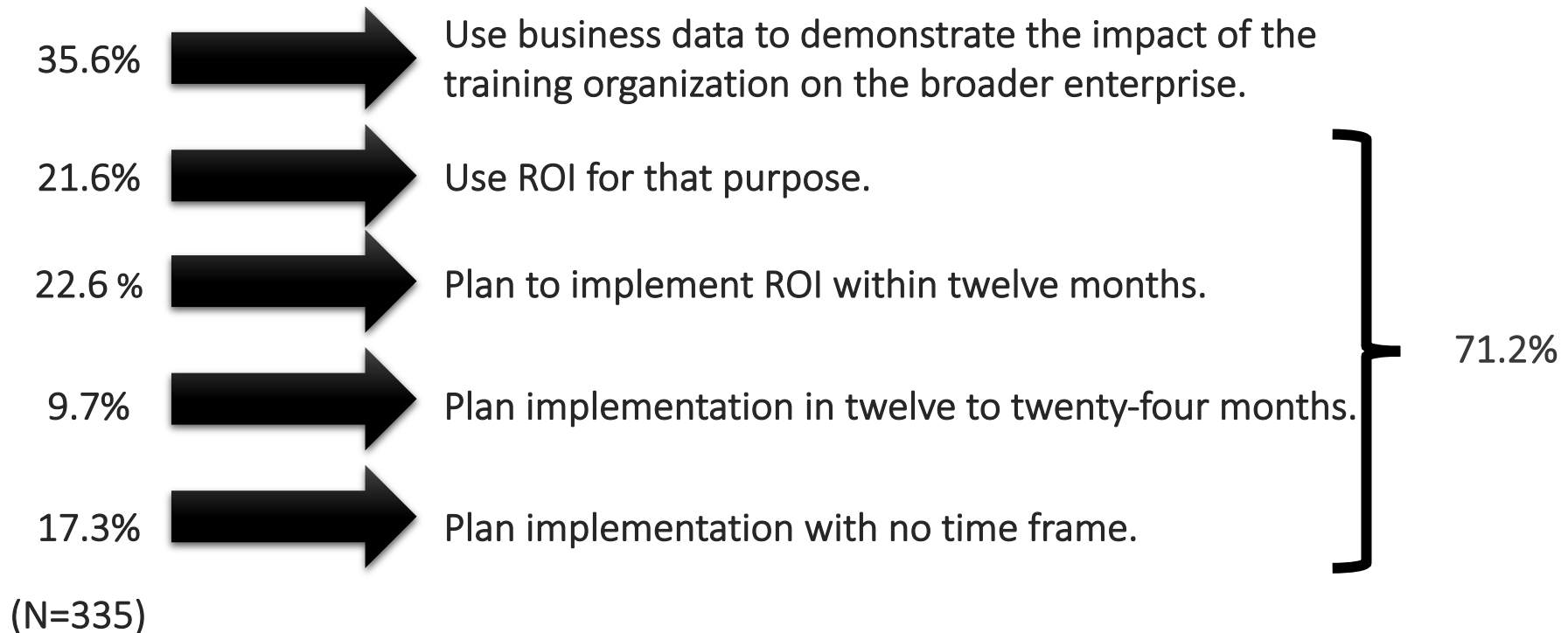
- Most of learning and development is wasted (not used).
- The learning outcome desired by executives in client organizations is rarely measured.
- Most learning providers do not have data showing that they make a difference in the organization.
- Most executives see learning as a cost and not an investment.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

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

CLOs Use or Plan to Use ROI



2015 Measurement and Metrics Study by CLO Magazine

A woman with dark hair and glasses is shown in the bottom right corner, looking upwards and resting her chin on her hand in a thoughtful pose. The background is a textured blue-grey color with several hand-drawn lightbulbs hanging from above. One lightbulb in the center-right is highlighted with a yellow glow, while the others are in a lighter blue tone.

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

— Training Top 10 Hall of Fame – May 2017

Scotland Yard



Hilton Hotels



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	Performance Consulting
✓	Reaction and Learning	Impact and ROI

What is Design Thinking?

Basic Principles*

A problem-solving approach to handle problems on a systems level

A mind-set for curiosity and inquiry

A framework to balance needs and feasibility

A way to take on design challenges by applying empathy

A culture that fosters exploration and experimentation

A fixed process and a tool kit

A storytelling process to inspire Senior Executives

A new competitive logic of business strategy

A means to solve complex or wicked problems

A means to reduce risks

*Mootee, Idris. (2013). *Design Thinking for Strategic Innovation*. Hoboken, NJ: Wiley.



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

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

A blue-tinted image of a city skyline with various skyscrapers and buildings, serving as a background for the top header.

Start with Why

Aligning Programs with the Business

Design Thinking Principle 1

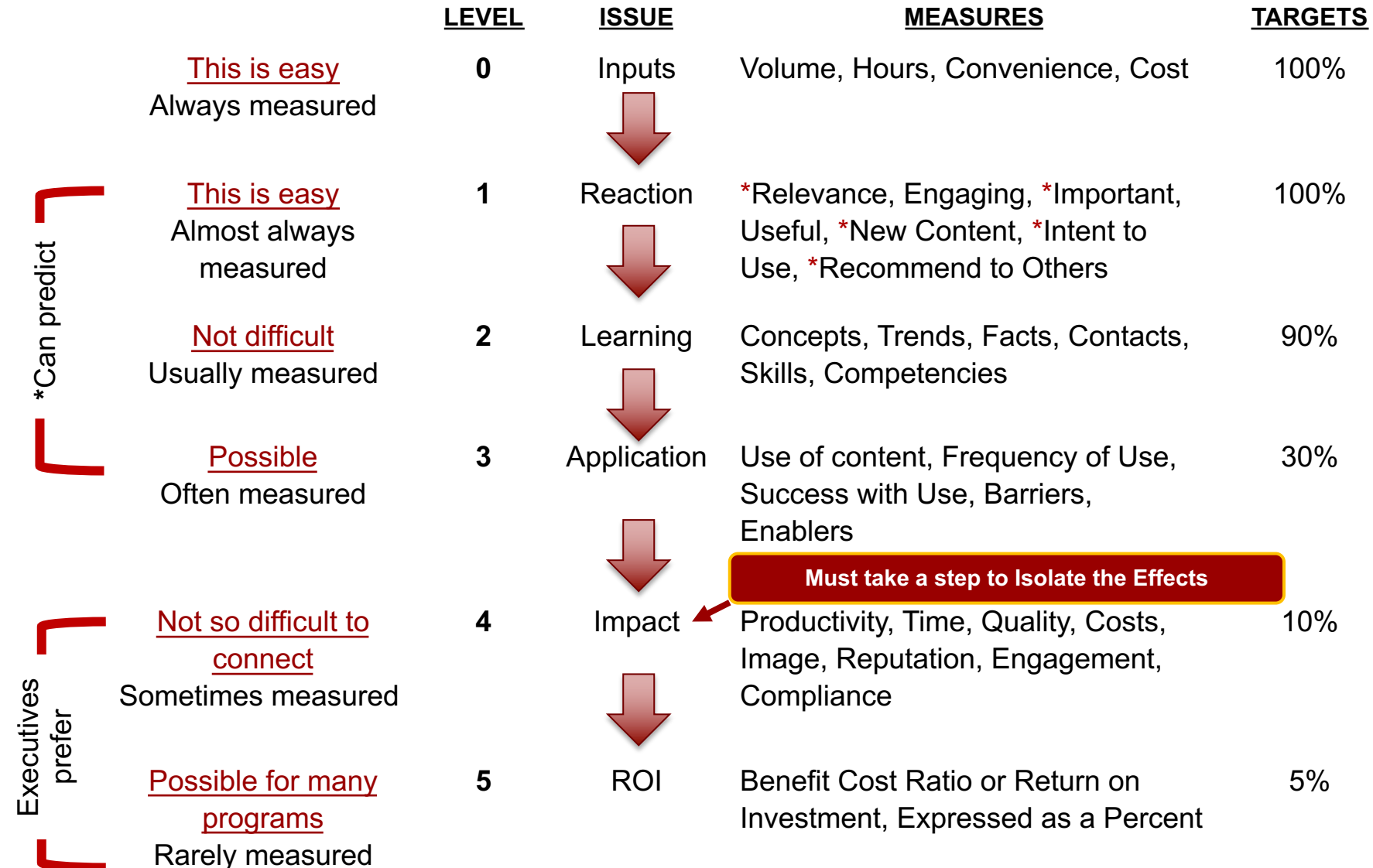
A Problem Solving Approach to handle problems on a systems levels

- Alignment is the key
- Is it a problem or opportunity?
- Need specific business measure(s)



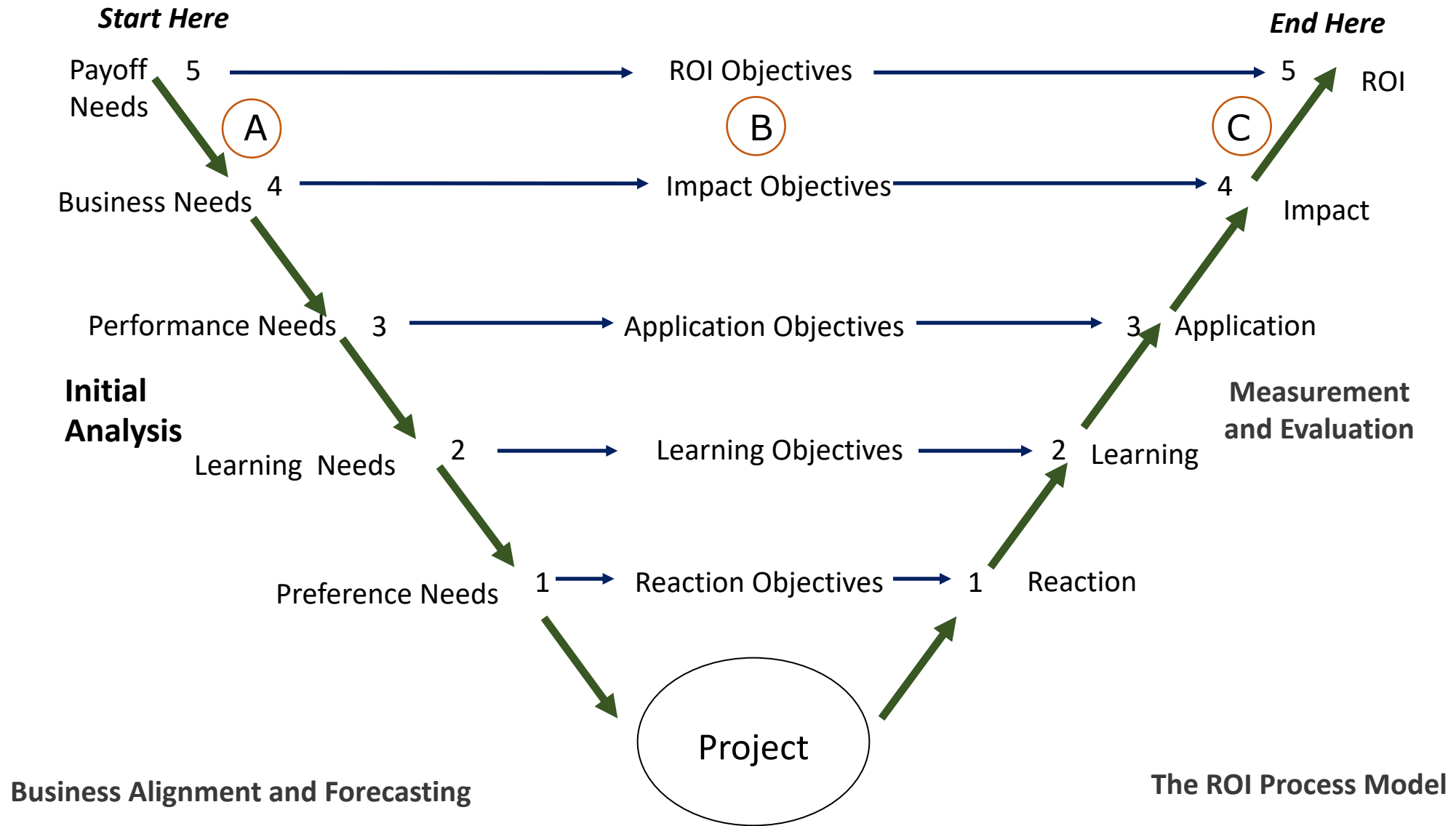
What is
value?

The Value Chain



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

Alignment Model





Make it Feasible

Selecting the Right Solution

Design Thinking Principle 2

A mind-set for curiosity and inquiry

Ask:

- What are we doing (or not doing) that's influencing the business measure?
- How can we achieve this performance?



Expect Success

Designing for Results

Design Thinking Principle 3

A Framework to balance needs and feasibility

- Set objectives at multiple levels
- Redefine success of learning
- Expand responsibilities



Matching Evaluation Levels with Objectives

Objective	Evaluation Level
After completing this program or project, participants should: 1. Decrease citizen complaints by 20% in one year.	



Matching Evaluation Levels with Objectives

Objective	Evaluation Level
After completing this program or project, participants should:	
1. Decrease citizen complaints by 20% in one year.	4
2. Use problem-solving skills to uncover product defect causes.	



Matching Evaluation Levels with Objectives

Objective	Evaluation Level
After completing this program or project, participants should:	
1. Decrease citizen complaints by 20% in one year.	4
2. Use problem-solving skills to uncover product defect causes.	3
3. Be able to demonstrate the five steps to diffuse a conflict, given two individuals in a heated argument.	



Matching Evaluation Levels with Objectives

Objective	Evaluation Level
After completing this program or project, participants should:	
1. Decrease citizen complaints by 20% in one year.	4
2. Use problem-solving skills to uncover product defect causes.	3
3. Be able to demonstrate the five steps to diffuse a conflict, given two individuals in a heated argument.	2
4. Rate the facilitator 4 out of 5 on presentation skills.	



Matching Evaluation Levels with Objectives

Objective	Evaluation Level
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5. Decrease the amount of time required to develop a proposal.	



Matching Evaluation Levels with Objectives

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4. Rate the facilitator 4 out of 5 on presentation skills.	1
5. Decrease the amount of time required to develop a proposal.	4

Write a one
sentence
description of
the success of
your learning
programs

A silhouette of a person standing on a large rock, with arms raised in a 'V' shape, symbolizing achievement or success. The background is a dark, gradient sky.

Define Success



What's Your Business?

The Possible Measures	
0	"Serve the largest number of people with the least amount of disruption and cost."
1	"Participants are engaged, enjoy the programs, and see their experience as valuable."
2	"Participants are learning the latest information and skills to make this a great organization."
3	"Participants leave the center, take action, use the content, and make important changes."
4	"Participants are driving important business measures and having an impact in their work units and the organization."
5	"Participants and the organization have a positive return on the investment of their time and the resources of the center."

Make it Matter

Designing for Input, Reaction, and Learning

Design Thinking Principle 4

A way to take on design challenges by applying empathy

- Focus on the objectives
- Think about the definition of success
- Make it relevant
- Make it important
- Make it action-oriented



Make it Stick

Designing for Application and Impact

Design Thinking Principle 5

A culture that fosters exploration and experimentation

- Collect data
- Focus on objectives
- Ensure transfer of learning
- Design for application



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				✓



Make it Credible

Measuring results and calculating ROI

Design Thinking Principle 6

A fixed process and a tool kit

- Isolating the effects of programs
- Converting data to money
- Tabulating Costs
- Calculating ROI



Measurement Targets

Level		% of Programs
0	Input	100%
1	Reaction	100%
2	Learning	80-90%
3	Application	30%
4	Impact	10%
5	ROI	5%

**What percent of
your programs are
evaluated at Level 4
per year?**





Bean Counters Need Beans to Count

Tell the Story

Communicating Results to Key Stakeholders

Design Thinking Principle 7

A storytelling process to inspire senior executives

- Define audience
- Identify why they need it
- Select method
- Move quickly
- Consider one page summary

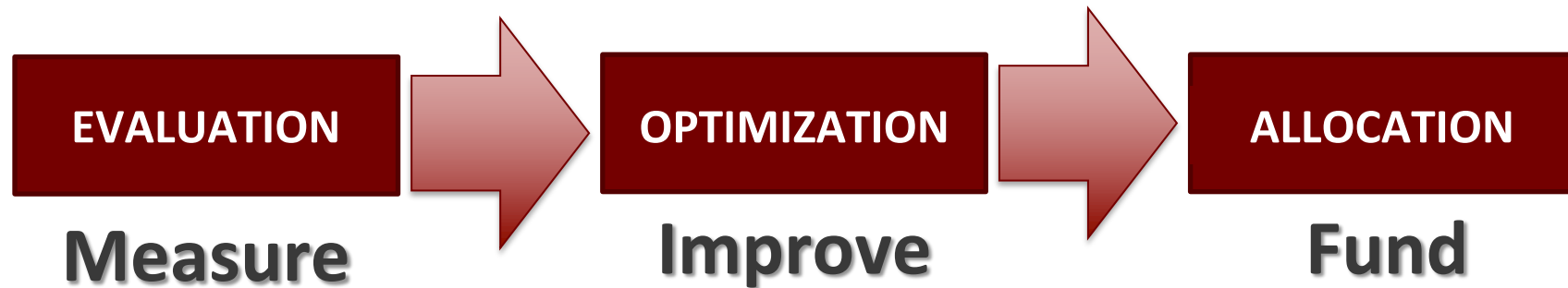


Optimize Results

Using black box thinking to increase funding

Design Thinking Principle 8

A new competitive logic of business strategy



A green rectangular street sign with white lettering that reads "EASY ST". The sign is mounted on a metal pole and is tilted slightly. The background is a clear blue sky.

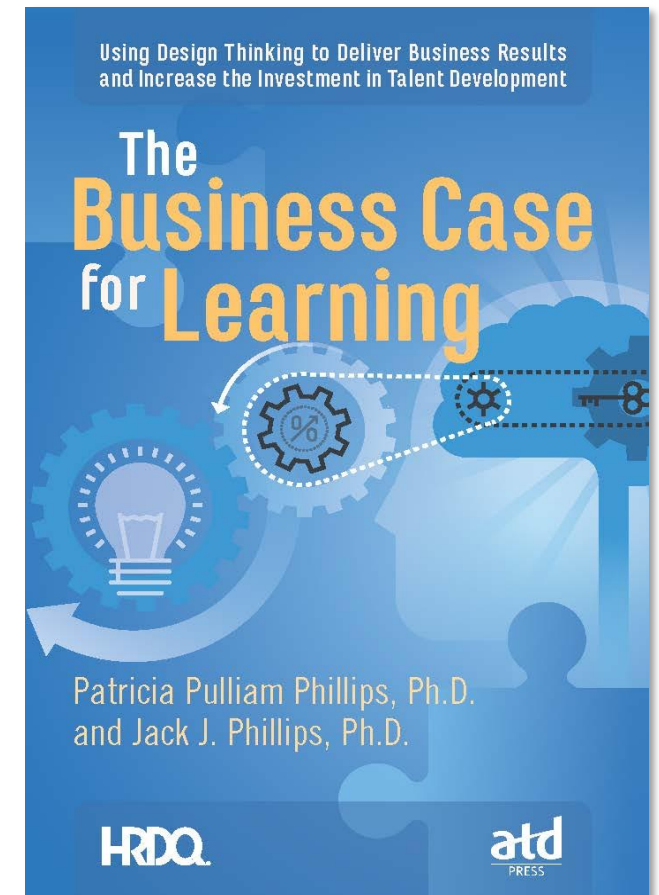
EASY ST

It's That Easy

And the Winner is...

We can send you
a free copy of the book
The Business Case for Learning

Contact Kylie@roiinstitute.net



A blue-tinted image of a city skyline with various skyscrapers and buildings, positioned at the top of the slide.

Be Proactive

Remember, when it comes to delivering 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.



The Payoff

- Align projects to business needs
- Show contributions of selected projects
- Earn respect of senior management/administrators
- Build staff morale
- Justify/defend budgets
- 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”



Questions?

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Connect with us on:



2019 US ROI Certification® Events

- 
- March 18-22, Phoenix, AZ
 - April 15-19, New Orleans, LA
 - May 13-17, Denver, CO
 - May 20-24, Washington, DC
 - June 3-7, Atlanta, GA
 - June 24-28, San Diego, CA
 - July 29-August 2, Columbus, Ohio
 - August 26-30, Atlanta, GA
 - September 9-13, Seattle, WA
 - October 7-11, Charlotte, NC

To Register: 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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