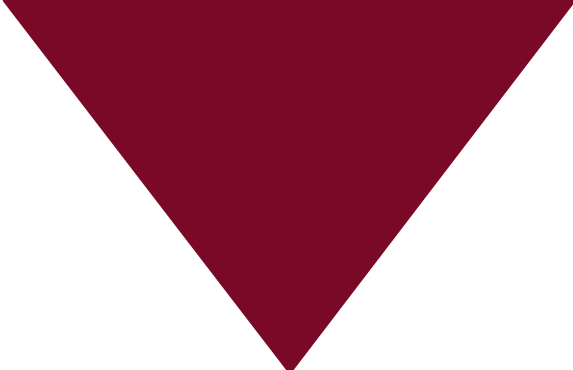




ROI Institute®

Global Leaders in Accountability
All Roads Lead to ROI



Providing:

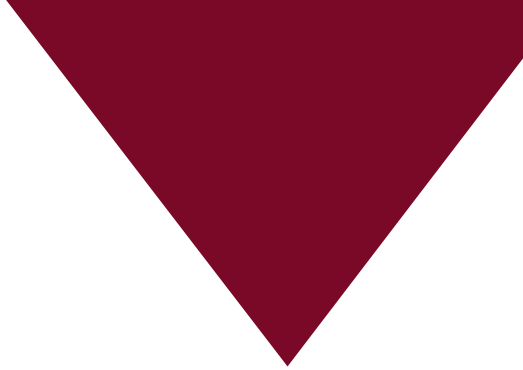
- **Workshops and Other Learning Opportunities**
- **ROI Certification for Serious Evaluation**
- **Impact/ROI Studies and Other Consulting**
- **Books, Case Studies, Guides, and Tools**
- **Research and Benchmarking**

A proven process to measure the Impact
and ROI for any project or program.

**This document is available in e-copy
for distribution to others.*

ROI INSTITUTE®

+1.205.678.8101 • www.roiinstitute.net • info@roiinstitute.net



About ROI Institute

ROI Institute helps individuals and organizations evaluate the success of projects and programs, including measuring the financial return on investment (ROI). We do this by providing workshops, consulting, coaching, briefings, keynote presentations, research, and benchmarking services. ROI Institute operates through a network of partners and associates in the United States and in 70 countries, assisted by more than 100 ROI consultants. Our services are tailored to important professional fields. All types of organizations benefit from our services, including businesses, nonprofits, government and nongovernmental organizations, educational institutions, associations, religious institutions, and healthcare providers.

Vision

To become the global authority on measurement, evaluation, and analytics, including measuring the financial ROI, for all types of projects and programs.

Mission

To develop, refine, and support the use of the ROI Methodology® in all types of applications and settings by building serious capability in individuals who become Certified ROI Professionals® (CRPs). In short, we help individuals and organizations show the value of what they do.

Strategic Objectives

1. Increase the knowledge of ROI among a broader public audience of professionals.
2. Offer relevant books, guides, case studies, briefing papers, and research reports on the use of the ROI Methodology.
3. Provide tools, processes, templates, and technology for efficient use of the ROI Methodology.
4. Develop serious capability for individuals to measure the success of their projects and programs.
5. Foster networking and collaborative exchange of information to enhance the widespread use of the ROI Methodology.

Services

Workshops – Learning experiences to meet your needs:

- Five-day certification workshops (Public and/or Internal)
- One, two, or three-day workshops (Public and/or Internal)
- Online and self-study programs (Public and/or Internal)

Consulting – Working with private businesses and public sector organizations, offering a range of services from conducting impact studies to coaching organizations through all levels of measurement and evaluation, including ROI.

Publishing – Books and articles are written, published, and made available to executives, administrators, professionals, practitioners, researchers, faculty, and students. We often request contributions of case studies, tools, templates, and success stories for inclusion in our books and websites.

Partners – Our strategic partnerships yield mutual and collaborative delivery of services. Our international partnerships foster the implementation of the ROI Methodology around the world.

Website and Internet Activities – www.roiinstitute.net provides information about ROI Institute, the ROI Methodology, ROI Certification® workshops, Certified ROI Professional, and so much more, including a wealth of resources on accountability, measurement and evaluation. ROI Institute provides books, case studies, research reports, briefing papers, tools, and templates. ROI Institute members, who have completed the ROI Certification workshop, gain access to our members only website with even more information and resources supporting ROI implementation.

Patti P. Phillips, Ph.D.

Chief Executive Officer

Leads the application and implementation of the ROI Methodology worldwide.

Jack J. Phillips, Ph.D.

Chairman

Developed the ROI Methodology in the 1970s and guides the latest applications for the 21st century.

Plus ...

More than 100 ROI certified consultants provide coaching, consulting, and workshops in more than 70 countries around the world.

Core Competencies



Teaching



Consulting



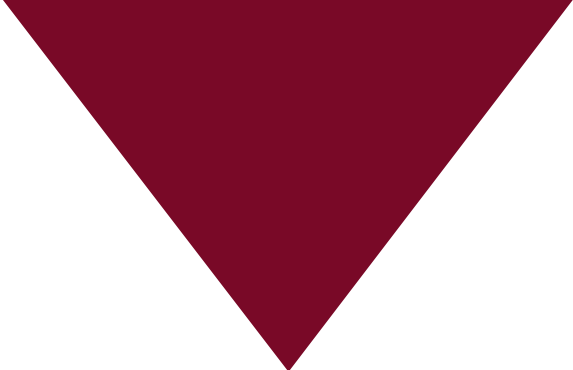
Writing



Research



Speaking



Why Measure Impact and ROI?

In recent years, we have witnessed change in organizational accountability, especially toward investment in people, programs, and projects. Project sponsors have always been concerned about the value of their initiatives. Today, this concern translates into financial impact — the actual monetary contribution from a project or program. Although monetary value is a critical concern, it is the comparison of this value with the project costs that captures stakeholders' attention — and translates into ROI.

“Show me the money” is the familiar response from individuals asked to invest (or continue to invest) in major projects and programs. At times, this response is appropriate. At other times, it is misguided; measures not subject to monetary conversion are also important, if not critical, to most projects. A balanced profile of success is needed. This profile should include qualitative and quantitative data as well as financial and non-financial outcomes.

Excluding the monetary component from a success profile is unacceptable in this age of the “show me” generation. The monetary value is sometimes required before a project is approved. Sometimes, it is needed as the project is being implemented. At other times, it is needed after project implementation.

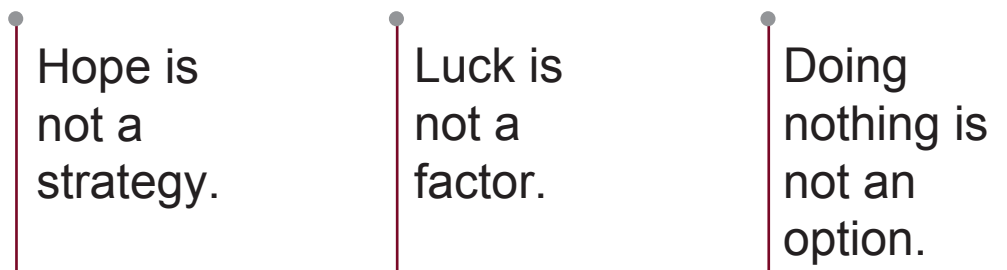
This issue is compounded by concern that most projects today fail to live up to expectations. A systematic process is needed that can identify barriers to, and enablers of, success and can drive sustainable improvements.

The challenge lies in doing it — developing the measures of value, including monetary value when they are needed, and presenting them in a way so that stakeholders can use them:

- Before the project is implemented.
- During implementation, so that maximum value can be attained.
- During post-analysis, to assess the delivered value against the anticipated value.

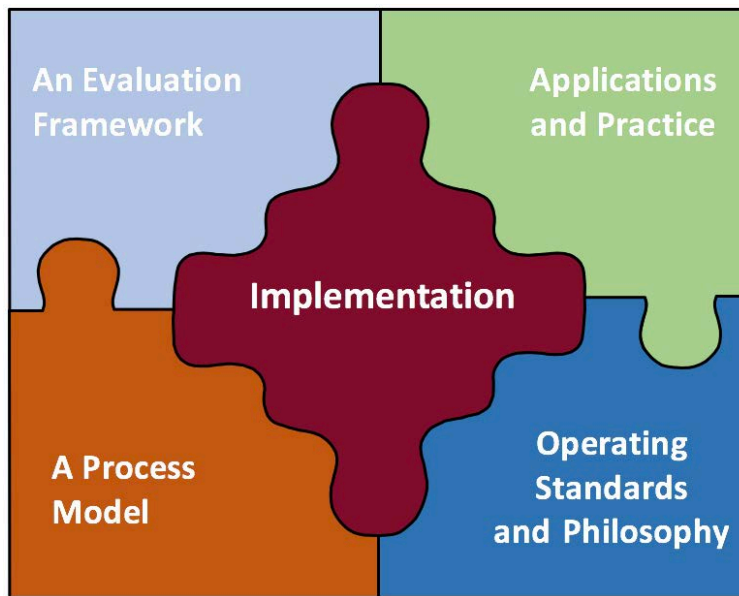
The ROI Methodology is a process that addresses all three scenarios.

When it comes to showing the value of your project or program:

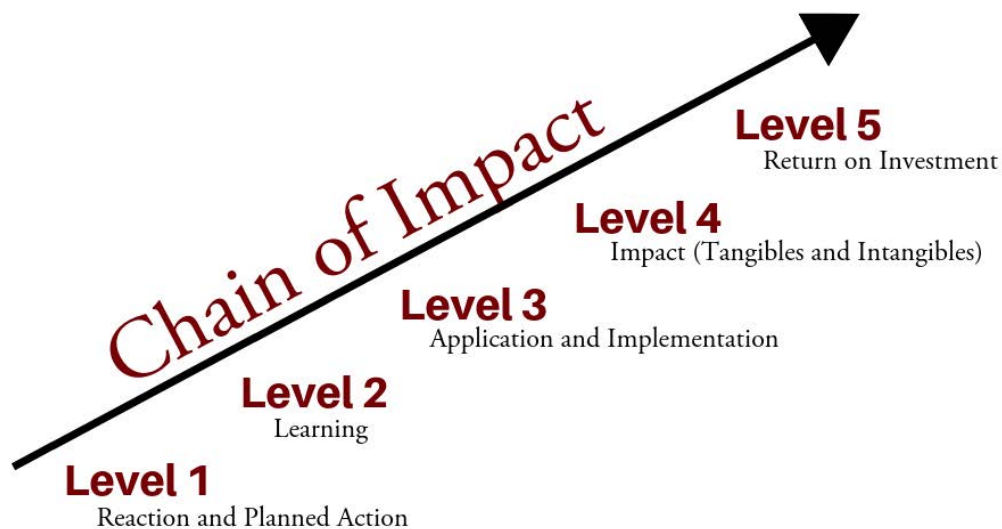


You must be proactive. Start the journey.

There are five elements of this comprehensive evaluation system.



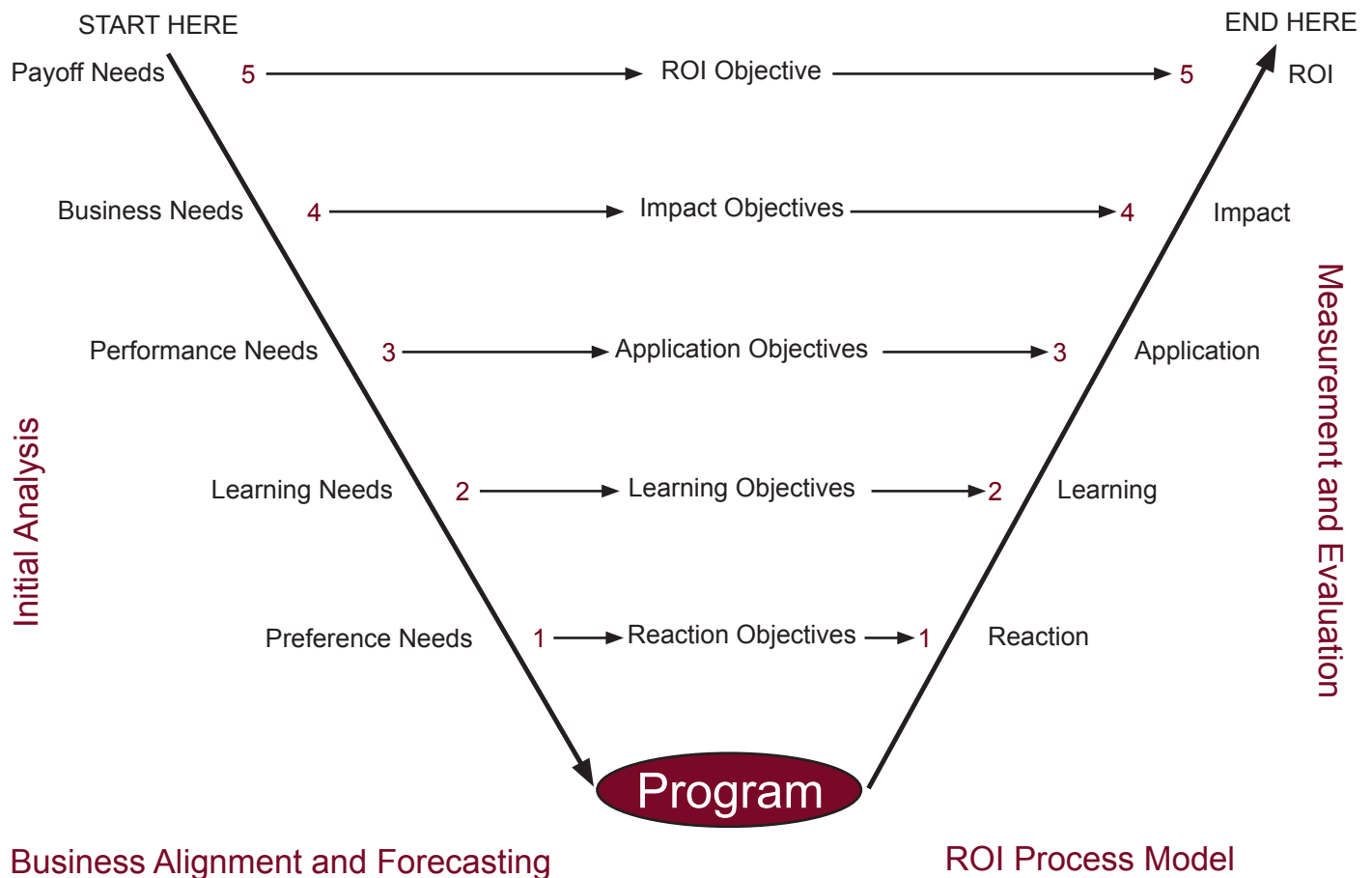
The ROI Methodology is a balanced approach to measurement that captures five levels of outcome data:



The process always includes a technique to isolate the effects of the project from other influences.

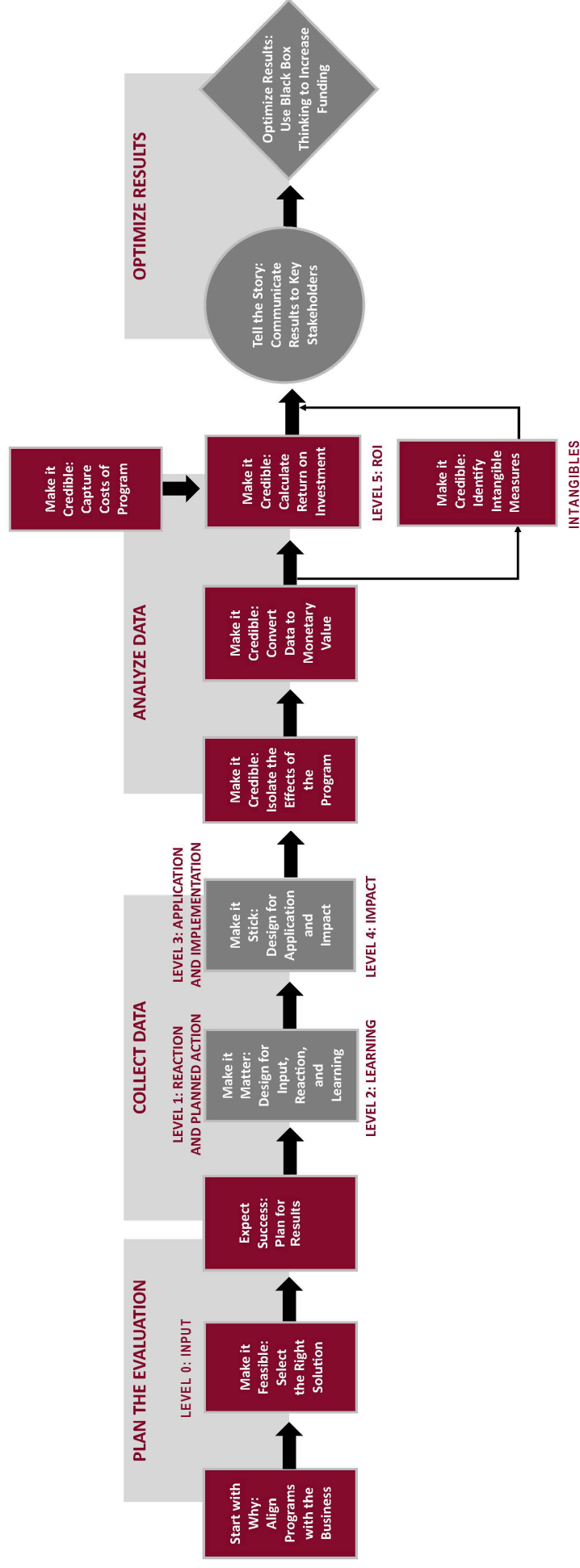
1. Evaluation Framework

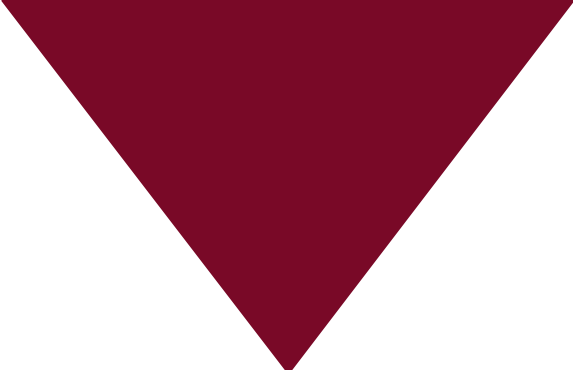
The V Model provides alignment, connecting needs assessment with evaluation using five levels of data.



2. A Process Model

The 12 steps in the ROI Methodology are logical and systematic, often labeled the enhanced logical framework.





3. Operating Standards and Philosophy

As the process model is used to conduct ROI studies, operating standards, labeled Guiding Principles, are used to ensure consistency and replication of impact studies.

The Guiding Principles provide a much needed conservative approach to the analysis. A conservative approach may lower the actual ROI calculation, but it will build credibility with the target audience, including the CFO.

Each standard is approved by over 75 percent of users before it becomes an official Guiding Principle.

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.

4. Applications and Practice

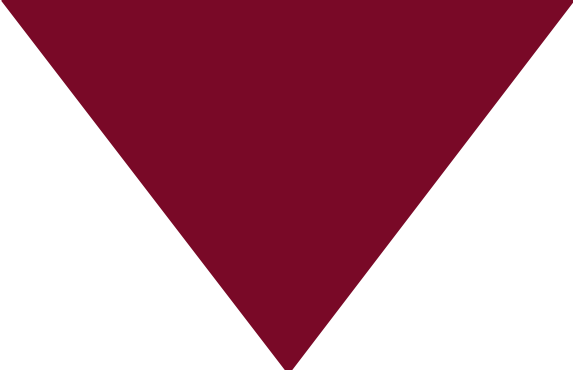
The ROI Methodology is the most used and implemented evaluation system in the world.



The step-by-step process for developing impact and ROI studies for programs, projects, and solutions is being used 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/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

More than **400** case studies have been published.



5. Implementation

To implement the ROI Methodology and sustain its use for years requires several steps:

- Set specific goals and targets for implementation.
- Determine specific roles and responsibilities for analytics, measurement, and evaluation.
- Conduct meetings and formal sessions to develop awareness and capability.
- Establish an internal ROI/analytics network for sharing information (if feasible).
- Conduct ROI studies routinely.
- Use tools and templates to make the process easier and more efficient.
- Report progress and adjust tactics.
- Improve management commitment and support for the ROI Methodology.
- Consider measuring the ROI on the ROI implementation.

This methodology is designed for these important groups:

1

Team members who evaluate projects need a simple, user-friendly process.

2

Senior managers, donors, sponsors, and clients who fund, initiate, and support projects need a credible outcome, based on conservative processes.

3

Researchers, professors, and critics who must support the analysis need a proven process that is logical, reliable, and valid.

Do the Math

Not all programs should be evaluated at every level. What percent of your programs or projects are evaluated at each level now? How does your current evaluation compare to the recommended use? What is your goal?

Chain of Impact

Level	Measurement Category	Current Status*	Recommended* (Percent of programs evaluated at this level)	Your Goal*	Comments About Status
	Input Measures input including number of programs, participants, audiences, costs, and time of involvement.		100%		This is being accomplished now
	Reaction Measures reaction to the experience, content, utility, and value of the program.		90-100%		Need more focus on content and perceived value
	Learning Measures what participants learned to make the program successful — information, knowledge, skills, and contacts.		60-90%		Must use simple learning measures
	Application and Implementation Measures progress with the program – the use of information, knowledge, skills, and contacts.		30-40%		Need more follow-up
	Impact Measures changes in business impact variables such as output, quality, time, jobs, health status, crime, stress, and carbon emissions linked to the program.		10-20%		This is the connection to business impact
	ROI Compares the monetary benefits of the impact measures to the costs of the program.		5-10%		The ultimate evaluation

*Percent of programs evaluated at each level. Add your numbers, current status, and goals in each box.

How does your current system stack up?

Compare your present evaluation system on ten dimensions.

Topic	Problem or Issue	What is Needed	ROI Methodology	Your System
Focus of use	Audit focus; punitive slant; surprise nature	Process improvement focus	Process improvement is the number one use	
Standards	Few, if any, standards exist	Standards needed for consistency and credibility	Twelve standards accepted by users	
Types of data	Only one or two types	Need a balanced set of data	Six types of data representing quantitative, qualitative, financial, and non-financial data	
Dynamic adjustments	Not dynamic; does not allow for adjustments early in the program cycle	A dynamic process with adjustments made early and often	Adjusts for improvement at four levels at different time frames	
Connectivity	Not respectful of the chain of impact that must exist to achieve a positive impact	Data collected at each level of the chain to validate the chain	Every level has data collection and a method to isolate the program's contribution on impact data	
Approach	Activity based	Results based	Uses twelve steps for results-based approach	
Conservative nature	Analysis not always conservative	A conservative approach is needed for buy in	Very conservative; CEO and CFO friendly	
Simplicity	Not user friendly; too complex	User friendly; simple steps	Twelve logical steps; an enhanced logic model	
Theoretical foundation	Not based on sound principles	Should be based on theoretical framework	Endorsed by hundreds of professors and researchers; grounded in research and practice	
Acceptance	Not adopted by many organizations	Should be used by many	More than 6,000 organizations using the ROI Methodology	

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 to evaluate your major projects and programs and report the results to drive organizational improvements.

ROI Certification is usually comprised of a five-day, in-person course and followed by one-on-one virtual assistance from an ROI Consultant to help you conduct your first Impact/ ROI evaluation study (a comprehensive report of results using the ROI Methodology). Upon demonstrating competency in applying the ROI Methodology, you will earn the prestigious Certified ROI Professional designation, joining an elite group of professionals who have earned this respected credential.

Typical Certification Components

Prework

Identify a project or program for ROI evaluation.
Prepare for the basics.

Workshop

Five days of content-rich, interactive sessions.
The focus is on your project evaluation.

Workbook and Materials

A valuable 300-page, action-oriented workbook.
Several books to use as references.

Virtual Assistance

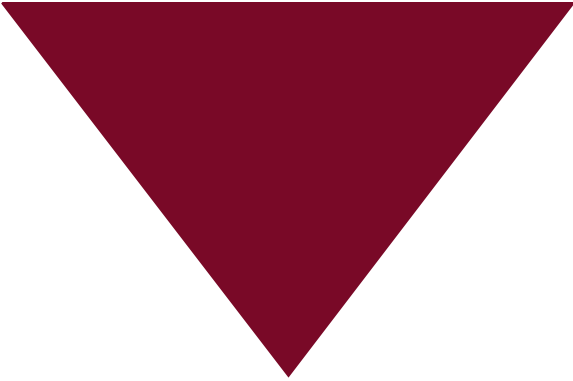
One-on-one help with your ROI evaluation.
Review and approval of your ROI study.

Right to Use Materials at Work

You have the right to reproduce our materials and use internally with your clients and colleagues.

Certified ROI Professional (CRP) Designation

A unique, sought-after credential.



Six Ways to Become Certified

1 Individual and Team Participation in the Five-Day Certification Workshop

This standard option requires individuals to attend a five-day certification workshop. Approximately 30 public offerings of ROI Certification are available each year, with about 12 in the United States and 18 internationally.

2 Internal ROI Certification

More organizations are switching to an internal ROI Certification where ROI implementation involves eight or more participants. In addition to cost savings and efficiency, internal certification allows participants in the organization to concentrate on their situation, programs, and projects. An internal focus is also helpful for planning the ROI implementation.

3 Coaching for ROI Certification

With this option, an ROI coach will be assigned to participants before they begin the ROI Certification workshop. The coach will initiate a series of sessions to guide participants to achieve the CRP quickly. The coach will usually provide 10 to 20 hours of direct time to each participant in the coaching process. Additional time may be negotiated.

4 Three-Day/Two-Day Option for ROI Certification

For individuals who have attended a two-day ROI workshop, either offered by another organization, such as the Association for Talent Development (ATD), or through ROI Institute's online academy, a three-day option is available. If an individual attends a two-day workshop conducted by ROI Institute faculty, we will credit the fee toward certification fee.

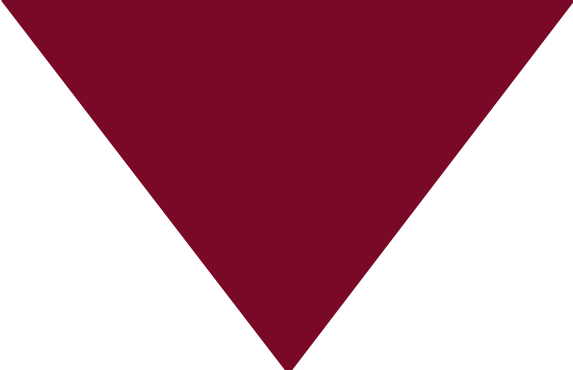
5 Test and Submit

While there is no coaching or support provided with this option, two steps are necessary to achieve certification. After payment of the registration fee, the individual can take a 75-item test assessing their knowledge of the ROI Methodology. The participant must achieve 75 percent to proceed. If the testing is successful, then the individual will submit the completed ROI study for approval. The study will be evaluated for final approval.

6 Guided Self-Study Program

This option includes a combination of reading assignments, exercises, and online learning offered through ROI Institute. Guided by an ROI facilitator, the participant reads the materials, books, and case studies; prepares the assignments; completes the exercises; takes a test; submits a ROI study; and ultimately achieves certification.

For more information on these approaches, contact info@roiinstitute.net.



Certification Objectives

Reaction

Provide participants knowledge and skills that are:

- Relevant to their job.
- Important to their current job success.
- Immediately applicable.
- New to their understanding of accountability.
- Relevant to their colleagues in similar job situations.

Learning

Enable participants to:

- Describe the five critical components of a successful evaluation practice.
- Identify the five levels of evaluation.
- Explain the twelve steps in the ROI Methodology.
- Follow the twelve Guiding Principles.
- Plan and execute an ROI evaluation project.
- Calculate and explain the difference in the benefit-cost ratio (BCR) and the return on investment (ROI).
- Communicate the results of an ROI study to various stakeholders.
- Implement the ROI Methodology within their organization.

Application

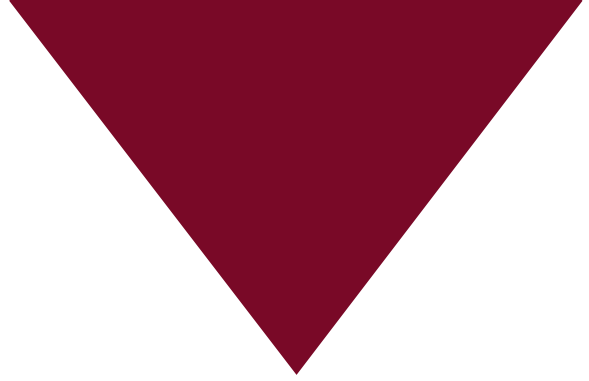
Support participants as they:

- Build support for the ROI Methodology in their organization.
- Complete their initial ROI evaluation project.
- Plan and implement future ROI projects.
- Revise/update internal evaluation strategy/practice.
- Brief/teach others the ROI Methodology.
- Change the way they propose, implement, and evaluate programs, processes, and initiatives.

Impact

Enable participants to realize positive consequences as a result of applying what they learn, such as:

- Improving program effectiveness.
- Improving program efficiencies.
- Expanding successful programs.
- Redesigning or discontinuing ineffective programs.



Focused

Proven

Practical

Grounded in Reality

Cost Effective

Ten reasons

why

Endorsed by
Top Executives
and Organizations

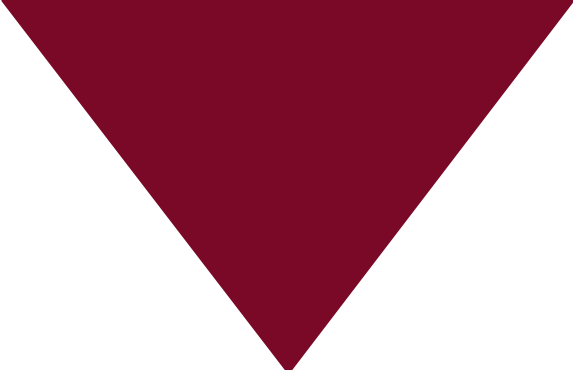
Sought-after Designation

Designed and Delivered
by the Thought Leaders

Immediately Applicable

Valuable Takeaways

[*ROI Certification is
Unique and Powerful.*]



Why?

1. Focused.

The content is rich with examples, tools, techniques, case studies, and templates to make it easy to collect and analyze powerful data. Participants often leave this workshop indicating that this is the most important workshop in their professional career.

2. Proven.

The ROI Methodology is built on application and process improvement. Beginning with the first studies in the 1970s, the process has been refined, enhancements have been added, process models have been developed, and an impressive list of applications has been created. It meets the needs for executives, professional evaluators, and users alike. Over 6,000 organizations are now using this methodology to conduct ROI studies on all types of projects and programs.

3. Practical.

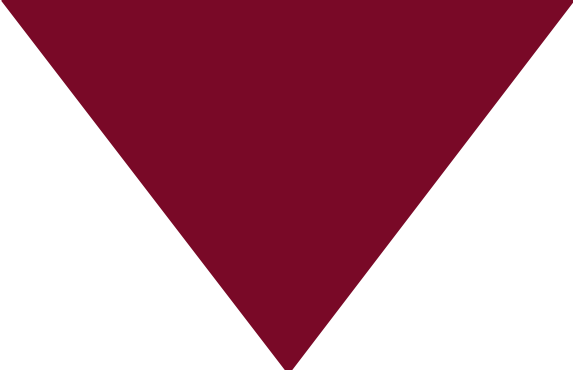
This workshop is not based on the success of another theory, but in practical processes. Mathematics are basic. There are no confusing theories and no time-wasting trivia in this workshop. Participants are taught how to use this methodology in their world, designed around their projects. They learn how to complete an ROI study and they prove it after the workshop.

4. Grounded in reality.

When it comes to analytics and ROI, it is sometimes difficult to stay realistic or relevant. This workshop is based on a proven methodology with standards that are conservative, consistent, and credible. These standards have evolved and new ones have been added over time, all approved by the users. It has been designed, shaped, modified, and enhanced by its users. All of the examples, applications, and case studies are real situations.

5. Cost effective.

When considering books, workbooks, job aids, skills acquired, five-days of valuable facilitation, online access, virtual support, the right to use materials, and the designation of Certified ROI Professional, this is a bargain. Compared to other certifications, this is a very cost-effective certification. This is not just a one-time workshop. This is an ongoing learning opportunity.



6. Endorsed by executives and organizations.

This methodology has been approved and endorsed by top executives and chief financial officers (CFOs) in many organizations. Sometimes the CFO is involved in implementing this process in an organization. Over two-thirds of the Fortune 500 companies have endorsed this methodology. Over 20 professional associations have endorsed it, including the Association for Talent Development (ATD), the Society for Human Resource Management (SHRM), and the International Public Manager Association (IPMA), to name a few. Many nongovernmental organizations have also endorsed it, such as the United Nations. Over 25 federal governments, including the United States, Mexico, Canada, the United Kingdom, Singapore, Australia, Chile, South Africa, Saudi Arabia, Italy, and Egypt have endorsed the methodology. These endorsements were not sought, but came from those organizations after they saw the power of the methodology.

7. Sought-after designation.

The Certified ROI Professional (CRP) is now a sought-after designation in many professional fields, particularly the Human Capital area. Since the first five-day certification was conducted in 1995, more than 14,000 managers and professionals have participated in ROI Certification, with 6,000 CRP designations awarded. This certification is a work-product certification so that the employers and clients know that participants have the capability to conduct an ROI study. Certified ROI Professionals report that they have been able to translate this designation into new job assignments, new responsibilities, promotions, and salary increases. Some have indicated that certification has been a factor in keeping their job in the face of layoffs.

8. Designed and delivered by thought leaders.

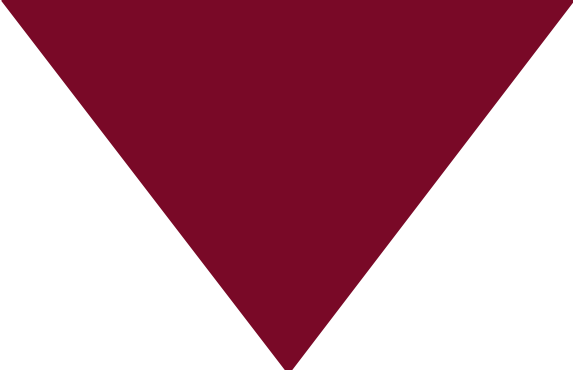
This workshop was designed by the founders of ROI Institute, Jack and Patti Phillips, and is delivered by senior executives of ROI Institute. The workshop is constantly updated. Jack and/or Patti are usually involved in each of the certification workshops, along with other team members. Each facilitator has years of experience in using ROI in top organizations, extensive publications, and consulting experience with a variety of audiences.

9. Immediately applicable.

The tools, processes, and skills learned in this workshop can be applied immediately. Some participants make adjustments during the workshop, modifying the process, policies, and practices of their respective organizations. The ROI Methodology can be used to evaluate existing programs or new programs. Ideally, the time to start the evaluation process is at the beginning of a program.

10. Valuable takeaways.

Participants have many takeaways, including: four to five books tailored to the participants' industry or application, a detailed workbook with places for notes and actions, models and application guides, 15 to 20 case studies in the area of their interest, at least a dozen articles, archived webinars, templates, and downloadable tools. Research generated by ROI Institute is available to participants at no cost and membership in the ROI Institute exclusive members only website is provided at no charge.



Certification Logistics Information

Public Certifications

ROI Certification is held publicly at least 12 times a year in the USA. Every session is usually hosted by an organization. These workshops are in different regions, sometimes with a particular area of focus. All public sessions are open to any functional area. See the website for a complete list.

Internal Certifications

In the United States, most certifications are conducted in-house, customized to the client's type of projects and special needs. For more information, visit www.roiinstitute.net.

International Certifications

At least 18 certifications are offered in countries outside the United States through our partner network. See the website for a schedule.

Fee

\$3,995

Visit www.roiinstitute.net to learn about substantial discounts for early-bird registration, hosting, and group rates.

Online Support

Participants will be granted online access to the ROI Institute members site, where they can access videos, articles, case studies, presentations, assessments, and an interactive message board.

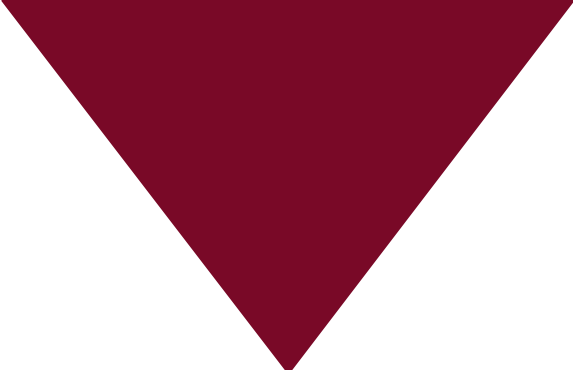
Continuing Professional Education

Continuing education units (CEUs) are available for many professional associations. For example, ROI Institute is an approved provider of HRCI credits. ROI Certification can also be submitted for continuing education units (CEUs).

Cancellation Policy

For registrants who notify us of their cancellation more than two weeks prior to the workshop, ROI Institute will apply the full amount of their tuition to a future ROI Certification course. This fee is transferable to another participant from the same organization.

For more information or to register online, visit www.roiinstitute.net or call (205) 678-8101.



ROI Institute Workshops

This is a sample of the workshops offered by ROI Institute. The number of days listed for each workshop can be customized. These workshops are conducted internally or through associations and learning providers.

ROI Workshops

The Value of Innovation (Two-Day)

This workshop focuses on the ROI in innovation. It is designed for individuals who are organizing and implementing innovation and creativity projects, funding these projects, and supporting innovation projects.

Connecting Human Resources to Business Results (Two-Day)

This workshop shows how to connect HR to business measures, develop productive relationships with the management team, and show the value for programs, up to and including the financial ROI.

The Bottomline on ROI (One-Day)

This one-day workshop introduces the concept of ROI, the fastest growing metric for evaluating HR, learning, talent development, and performance improvement.

Measuring the ROI for Green and Sustainability Projects (Two-Day)

This workshop is designed for managers who need to show the value of various environmental projects, particularly "green initiatives."

Forecasting ROI (One or Two-Day)

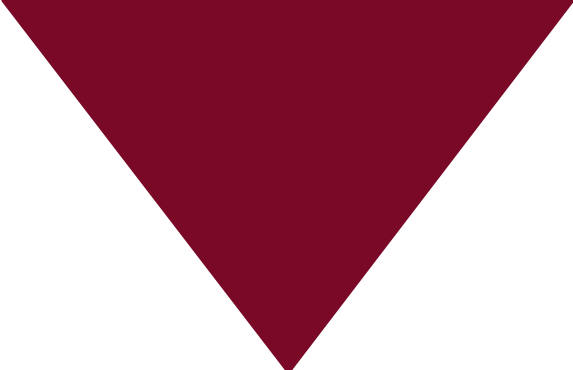
This workshop is designed to show how to forecast impact and ROI before a project is implemented and at different points during the project.

Measuring the ROI of Motivation and Recognition (Two-Day)

Designed for professionals and managers who are designing and implementing motivation and recognition programs, this workshop shows the impact and ROI these programs deliver to top executives.

Measuring the ROI of Learning Through Technology (One or Two-Day)

Designed for professionals who design, develop, and administer eLearning, mobile learning programs, and microlearning, this workshop shows the business value of technology-based learning.



ROI Institute Workshops

Measuring the ROI in Sales Training (Two-Day)

Designed for professionals involved in sales training and sales enablement, this workshop shows how to measure the success of these programs at the impact and ROI levels.

Measuring the Success of Employee Engagement (Two-Day)

Designed for specialists and managers involved in implementing employee engagement programs, this workshop shows executives the impact and ROI of having employees fully engaged.

Measuring the ROI in Health and Safety (Two-Day)

Designed for health and safety professionals, this workshop shows how to measure the success of all types of safety and health programs implemented in organizations.

Measuring ROI in Healthcare (Two-Day)

This workshop shows how to measure the impact and ROI in all types of programs for healthcare, including programs for new medical procedures, risk management, quality, technology, human resources, learning and talent development, and marketing.

Measuring ROI in the Public Sector/Nonprofits (Two-Day)

Designed for professionals who work in governments, nongovernmental organizations, and nonprofits, this workshop shows how to measure success of programs at multiple levels, including ROI.

Maximizing the Value of Consulting (Three-Day)

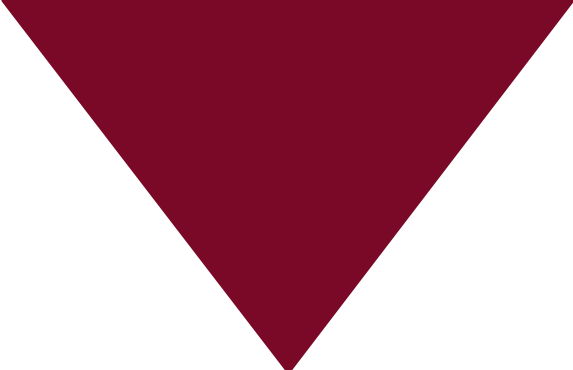
Designed for consultants who want to ensure they have delivered value to their client, this workshop ensures that the project is connected to the business in the beginning, the project is managed efficiently to control the cost, and the value is delivered, with impact and ROI evaluation after the project is completed.

Measuring the ROI in Technology (Two-Day)

Designed for IT professionals, technology specialists, and software implementers, this workshop shows how to measure technology projects at five levels of outcome, including impact and ROI.

Measuring the ROI for Meetings and Events (Two-Day)

Designed for meeting and event professionals, this workshop shows how to measure the impact and ROI of meetings and events from the organizer, participant, and exhibitor perspectives.



ROI Institute Workshops

Measuring the ROI in Marketing (Two-Day)

Designed for marketing, branding, and advertising professionals, this workshop shows how to measure the impact and ROI of all types of marketing campaigns, advertisements, promotions, and other similar marketing activities.

Project Management ROI (Two-Day)

Designed for project managers, this workshop shows how to measure the impact and financial ROI for projects, moving accountability beyond cost monitoring and scheduling.

Measuring ROI in Coaching (Two-Day)

Designed for coaches and individuals who employ coaches, this workshop shows how to measure the success of coaching, including impact and ROI evaluation.

Measuring ROI in Leadership Development (Two-Day)

This workshop is designed for those involved in developing and implementing leadership development and management development programs. It shows how to measure the impact and ROI of these programs.

Measuring ROI in Soft Skills (Two-Day)

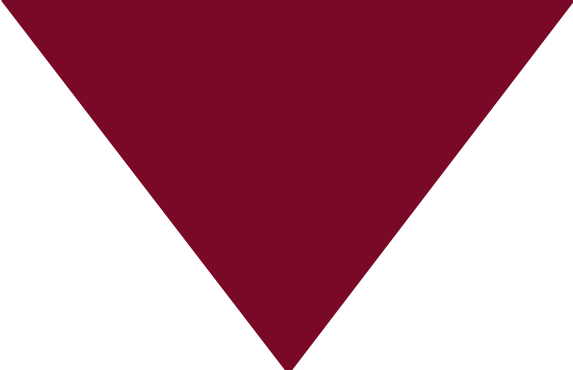
Designed for learning and development and HR professionals, this workshop shows how to measure the impact and ROI in all types of soft skills, including teambuilding, communications, and onboarding.

Measuring the ROI in HR and Learning & Development (Two-Day)

Designed for professionals who are measuring the impact of learning and HR interventions, this workshop focuses on the skills of alignment and measurement that are necessary to effectively conduct ROI studies.

Measuring the ROI in Organization Development (One or Two-Day)

Designed for OD professionals, this workshop shows how to align OD projects to the business and measure the impact and ROI of those projects.



ROI Institute Workshops

Accountability and Alignment Workshops

Achieving Business Alignment (One-Day)

This workshop is designed to show how to connect programs to business measures in the beginning, maintain that business connection through the project, and validate business alignment at the end.

Developing a Successful Consulting Practice (Two-Day)

This workshop is designed to help consultants develop an effective consulting practice that is properly funded, managed successfully, and delivers the results clients need.

Making Human Capital Analytics Work (Three-Day)

Designed for human capital analytics teams, this workshop shows how to set up the practice, decide on which projects to pursue, implement a systematic process to deliver results to executives, and keep (or enhance) the budget.

Developing a High-Impact Human Capital Strategy (One or Two-Day)

Designed for human resources executives, this thought-provoking workshop focuses on developing a strategy to address the 12 forces that influence organizations today.

Investing in Human Capital (One-Day)

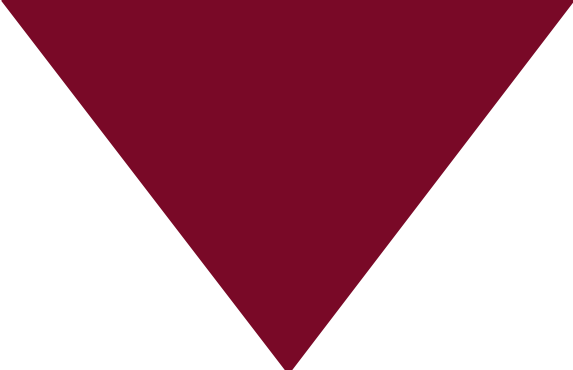
Designed for HR executives and senior operating managers, this workshop shows how to properly invest in human capital, measure the value of the human capital investment, develop partnerships, and decide on an appropriate human capital scorecard.

Performance Consulting (Two-Day)

This workshop is designed for those individuals who provide solutions and want to ensure that they properly solve a problem, identify a particular solution, connect the solution to one or more business measures, and measure the success of the solution.

The Chief Talent Officer (One or Two-Day)

Designed for heads of talent development and talent management (and those who plan to be in that role), this workshop shows how to manage that role to efficiently and effectively drive value in the organization.



ROI Institute Workshops

Supporting Workshops

Developing an Evaluation Strategy (One-Day)

This workshop reviews evaluation strategy in terms of capabilities, goals, use of technology, and other issues necessary to ensure that programs deliver the results desired by executives.

Designing for ROI (Two-Day)

This workshop explores design thinking principles and how they are used to deliver results and increase investment in future programs.

Developing Objectives that Link to the Bottomline (One-Day)

This action-packed workshop shows how to develop objectives for programs at five levels and includes many practice sessions.

Survey Design and Analysis (One-Day)

This workshop is designed to show how to develop powerful surveys, ask the right questions, and achieve the desired response rate.

Writing for Publication (Three-Day)

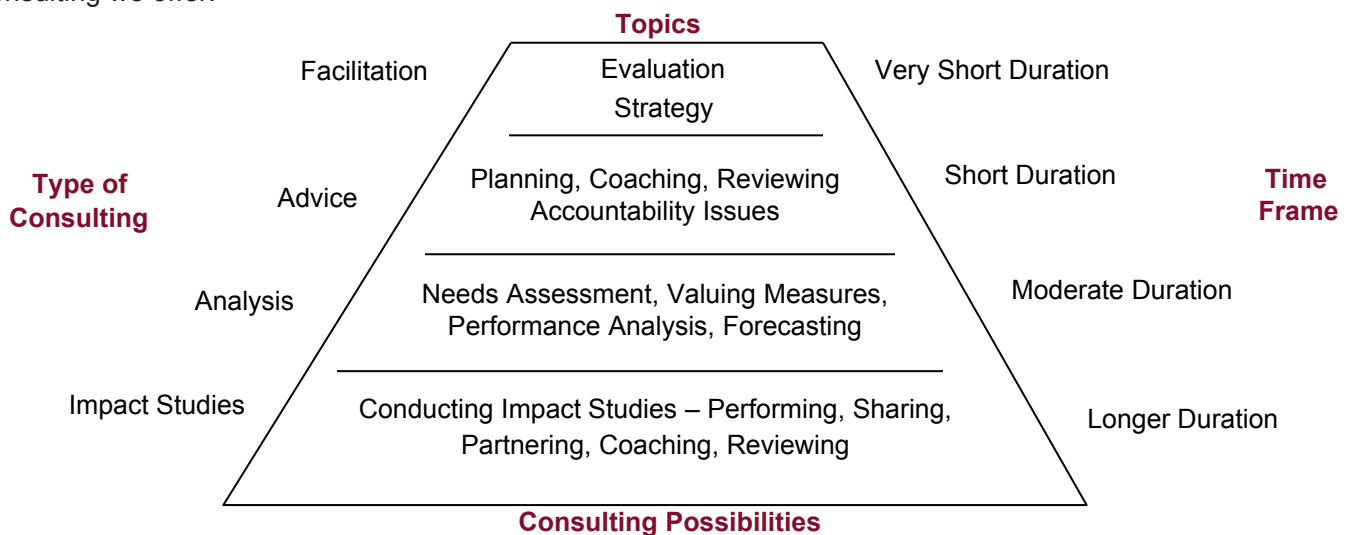
This intensive “boot camp” explores how to develop specific ideas for a book, write a compelling book proposal, secure a publishing contract, decide how and where to be published, and write efficiently and effectively.

Making the Business Case (One-Day)

This workshop shows how to align an idea or solution to the business, prepare the business case for implementation, and present the proposal to an executive audience.

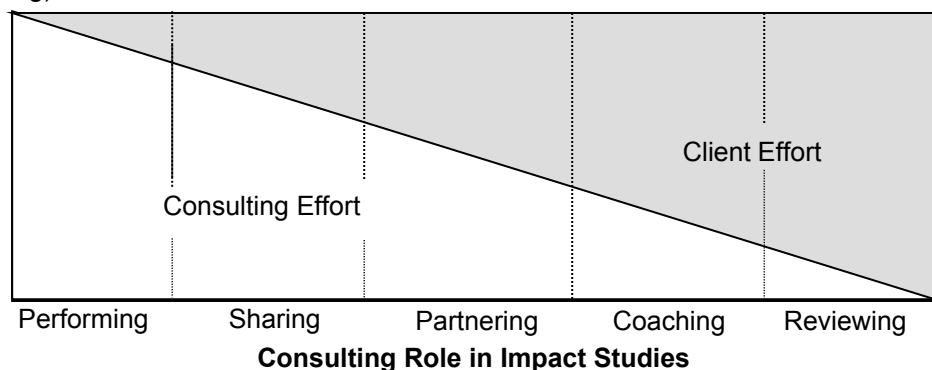
Consulting

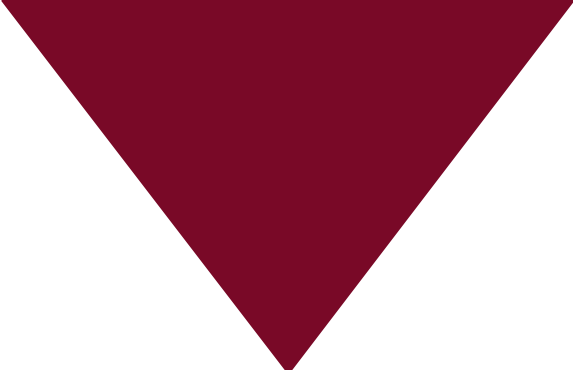
ROI Institute consultants provide assistance with assessment, measurement, analytics, and evaluation to individuals and organizations. At the heart of the practice, consultants conduct impact studies on various projects and programs. Consultants provide an independent assessment of a project, measuring reaction, learning, application, impact, ROI, and intangibles. Barriers and enablers are identified to show how the project can be more successful. ROI Institute provides guaranteed satisfaction. Projects range from studies involving a small group of individuals to large-scale evaluations spanning multiple months or years. The figure below shows the types of consulting we offer.



Impact Studies

The most basic services are those involving impact studies. This is the basic process through which the ROI Methodology is used and there are a variety of opportunities to help clients in developing impact studies. The figure below shows the consultant's role in developing impact studies, ranging from conducting the study (performing) to reviewing the completed study. This figure shows the relative relationship between the consulting effort and the client effort. In some cases, the consultant develops the project independently of the client and presents the impact study (performing). In other cases, there is a sharing of information along the way so the consultant is routinely communicating, providing feedback, and explaining the methodology to the client (sharing). In another arrangement, the consultant partners with a client so that they jointly conduct the study, each with respective duties and responsibilities (partnering). In another variation, the consultant coaches the person conducting the study, usually one-on-one, through different steps of the process (coaching). Finally, the consultant reviews the study after its completion by the client (reviewing).





Analysis

Needs assessment studies are typical. A performance analysis is often needed to determine the cause of a particular problem or the value of an opportunity and make sure that the problem or opportunity is aligned with the business. Additional analysis may be needed to determine the proper solution or solutions to improve the business measures.

Analysis also involves developing forecasts of specific projects. Both impact and ROI can be forecasted in advance of any development or implementation work.

Placing a monetary value on measures such as employee turnover, customer complaints, or customer satisfaction are possible projects as well.

Analysis also involves developing relationships between variables and developing predictive models.

Advice

A variety of advice categories are possible such as planning an ROI study. For example, a one-day meeting with a client to develop the evaluation plan is a very helpful consulting activity. In some cases, the consultant is coaching the client on a variety of issues. In other situations, the consultant reviews the progress, data, steps, and accountability issues to help the client bring additional accountability to solutions.

Facilitation

In the facilitation phase, the consultant is facilitating meetings where an evaluation strategy is developed, and ROI implementation is planned, or the ROI progress is reviewed. These are very important strategic-level meetings, often involving the top learning and development or HR person, depending upon the target audience. The outcome is an evaluation strategy plan to be implemented, an ROI implementation plan to be executed, or a progress report that is generated to serve as a measure of success with implementation.

Obviously, there are different fees connected to each of these different services, but all of them are offered to provide the client a complete range of possibilities. The ROI Institute philosophy is to transfer as much capability to the client as possible.

Consulting Fees

While it is risky and very difficult to establish consulting fees in different countries and cultures, we will provide some advice that we have included in our book, *How to Build a Successful Consulting Practice*. In this book, we suggest the following pay ranges:

Ranges for Consulting Fees

Experience Level	Description	Daily Fee Range
1	New, entry-level consultant.	\$1,000-\$2,000
2	Some experience, with at least two years of ROI consulting experience.	\$2,000-\$3,000
3	Senior consultant, with at least 5 years of ROI consulting experience.	\$3,000-\$4,000
4	Expert consultant, with at least 10 years of ROI consulting experience.	\$5,000-\$10,000

Contact ROI Institute for a proposal for your consulting needs.

Books to Suit Every Measurement Need

There are more than 75 publications to support the ROI Methodology.



ROI by the Numbers



14,000

professionals have participated
in ROI Certification

6,000

Certified ROI Professionals
(CRPs)

6,000

organizations have implemented
the ROI Methodology

30,000

professionals have participated in
two-day ROI skill-building
workshops



ROI implemented
in more than

70

countries



more than

75

books translated into

38

languages to support
this methodology



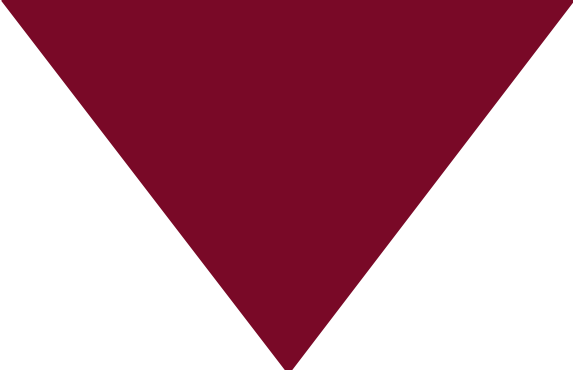
74%

of CEOs want to see
the ROI from programs



11%

of leadership
development programs
are evaluated at the
ROI level



Benefits of ROI

The use of the ROI Methodology has grown substantially. Initially, the process became popular through publications and networking among a small group of practitioners. In 1993, ROI Institute was organized to bring information to the global community. ROI Institute has made a significant impact in over 6,000 organizations using the methodology. Users report a variety of impacts and consequences after using the methodology for several years.

IMPROVE PROJECTS

The number-one benefit of using the ROI Methodology is that projects and programs are improved with the use of results. This is the principle focus of the methodology; data are collected to show how the project should change to increase success. When projects are not delivering the value needed, i.e., a negative ROI, the data indicate what needs to change to deliver the proper business value. Some users report their application of the process has led to the removal of unnecessary programs.

ENHANCE RELATIONSHIPS

Collecting data to show the value of projects and programs is one of the best ways to enhance relationships and earn a “seat at the table.” To be effective in an organization, users must work with a variety of clients and stakeholders. Productive relationships with key managers must be developed. Many users of the methodology indicate that relationships with business partners have improved. As one manager in a brewery in Europe stated, “Presenting an ROI impact study was the first time I had an intelligent business discussion with the CEO, and it made a tremendous difference in our relationship going forward.”

IMPROVE IMAGE

When data reveal the success of various projects and programs at the impact and ROI levels, the image begins to change. Some organizational functions have a reputation for not contributing value. (Human resources, communications, consulting, change management, public relations, ethics, and compliance are often viewed this way.) Users report the image of the function has been enhanced considerably with the use of ROI, graduating from the perception of an activity-based cost center to a results-based investment center.

SECURE FUNDING

Additional funds are often attributed directly to the use of the ROI Methodology. Some budgets have increased in the face of budget reductions in other parts of the organization. One tool and small appliance maker reported a two-fold increase in the budget based on the use of ROI. A large, well-known insurance company quadrupled its budget in two years with the ROI Methodology. Some users have been able to secure funding with an ROI forecast on a pre-program basis.

IMPLEMENT NEW PROJECTS

Some users evaluate a pilot program to determine if that program should be implemented in other areas. Capturing five levels of data creates a much better database for decision making. For example, a large retailer uses this methodology to show the value of projects before they are implemented throughout all of its stores. Using a pilot group of 20-25 stores, the company compares the results with a similar group and makes the decision to implement the program based on its complete profile of success, including ROI. This lowers the risk associated with the decision to implement.

BUILD SUPPORT

Support of projects and programs is an area of concern for more project leaders and program directors. Additional support is almost always needed, particularly from middle-level managers. When the ROI Methodology is used, these managers have more data about the success of programs. When programs and projects drive impact and ROI data, managers will support the effort.

IMPROVE YOURSELF

Many users report personal success as a result of using the ROI Methodology. Some receive a promotion. A general manager in a Latin American retail store chain was promoted to her position after implementing the methodology in HR. Another professional reported she was able to keep her job during a restructuring and downsizing at a large computer company. A government professional reported she was able to secure a new job as a result of completing ROI Certification.

“

“There is no more important measure than business impact. Jack and Patti Phillips not only use their years of experience in measuring impact, but also their vast network of contacts to arrive at 12 easy steps anyone can follow.”

-Kevin Oakes
CEO

Institute for Corporate Productivity (i4cp)

“Clearly the Phillipses are the established experts, and they offer tested, step-by-step ways to succeed and gain the necessary organizational support for learning. We are proud to use their methods and tools in our courses to allow our learners to obtain ROI Certification as part of our masters and doctoral programs. I recommend this method to anyone interested in proving the value of learning.”

-Michael J. Offerman
President Emeritus
Capella University

“The Phillipses and ROI Institute have made me a believer-- so much so that I had one of our companies develop a keypad system that not only provides the usual audience response services we are known for, but also has ROI Methodology templates and calculations built right into the software. I not only believe in this process... I am staking my business on it.”

-James J. McNamara
Chairman and CEO
iDNA, Inc.

Everybody's talking about ROI

“Throughout my 40-year business career, I have recognized that alignment is the most common ailment of poor performing organizations. It is one thing to talk about it and another thing to do it. The Phillipses have laid out a clear and practical map for converting wishes to reality.”

-Dr. Jac Fitz-Enz
CEO
Human Capital Source

“Jack and Patti Phillips unravel the mystery of measurement by presenting a balanced set of measures that show the full impact of programs, including bottomline measures such as business impact and ROI.”

-Stephen R. Covey
Author of *The 7 Habits of Highly Effective People*

“In a tough economy, being able to prove HR's value in real dollars and cents is critical to keeping our seat at the table and getting precious budget dollars. Jack and Patti present one of the most powerful tools in any HR professional's toolkit in a straightforward, usable, and insightful way. Their common sense, step-by-step approach allows professionals of all skill levels and backgrounds to begin to realize and demonstrate HR's role as a revenue enhancing organization!”

-Jim Black, MBA, MBL, SPHR
Adjunct Faculty
Friends University

”



"Kudos to Jack and Patti Phillips for providing a logical, systematic project evaluation framework that incorporates both financial and key non-financial elements affecting an investment decision."

-Hank Walker

Partner

Andrade/Walker Consulting

Former CEO of a large Catholic Health System

"Not measuring the impact of leadership development is like dieting without weighing-in. Their outstanding books offer a very logical and practical approach to measuring the impact of leadership development."

-Dave Ulrich

Professor

University of Michigan, Ross School of Business

"Wow, I redesign sales training for a living, and here's a rare tool every sales executive should own. The charts alone are spectacular and can be used to quickly implement an analysis before and after your programs are run."

-Dan Seidman

CEO

Got Influence?

Author of *The Ultimate Guide to Sales Training*

"The methodology is a very practical method to evaluate the efficacy of our sales training program and will elevate the credibility of the L&D organization. Professionally, it will support my career as a L&D professional as very few people have done much beyond level 3. This will help our L&D team matter as an organization and enable us to submit programs for different awards/accomplishments in the industry."

-Natalie Hamlett

Learning and Development Program Manager
North Highland Consulting

"Jack, Patti, and Tim truly care about teaching ROI. They are truly invested in their product and process. They are committed to each individual and their success. The ROI process will be invaluable to my work successfully presenting to the executives in my company. Although I am a project manager for software development, there are other processes for ROI within it. The information and process provided in this class is invaluable to me, and I will move forward with my projects using the ROI Methodology for taking it to the next level."

-Candy Williams

IT Implementation Project Manager

Rollins, Inc.

"The ROI Methodology definitively provides a means to establish the value of the coaching impact to leaders and managers in support of the business, mission, and service value."

-Jean Strosinski

Owner

Constructive Choices New Mexico, CCC

"The ROI Methodology is ideal for use in higher education to measure the impact and ROI of our programs and processes."

-Jennifer H. Lawrence

Director of Advancement and Grants

Bossier Parish Community College

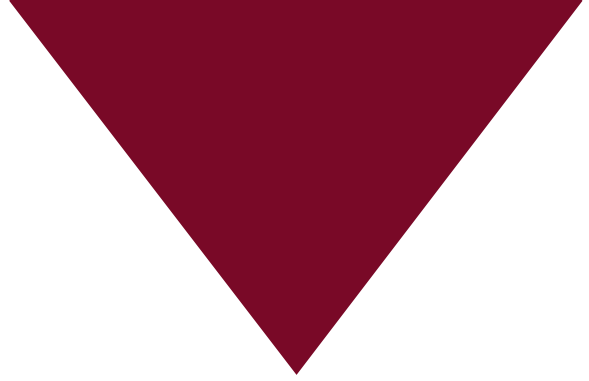
"The future of all business is data driven. The ROI Methodology is going to help me lead the meetings industry to embrace ROI."

-Tanya Perry

Vice President of Sales and Marketing

Fusion Performance Group





Certification

Workshops

Consulting

Books

Case Studies

Research

Your Source
for

Articles

Tools/Templates

Webinars

Conference
Presentations

Videos

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