

Designing Virtual Learning to Deliver Impact and ROI

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Resources

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Poll: Why are you pursuing this subject now? Check all that apply.

- ☐ Top executives are requiring it. 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.

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Session Objectives

After attending this session, participants should be able to:

1. Identify the five levels of outcomes from virtual learning.
2. Describe why virtual learning fails to deliver application and impact.
3. Explain the need to deliver impact and ROI for selected virtual learning programs.
4. Design virtual learning to deliver application, impact, and ROI, using design thinking principles.
5. Plan next steps to ensure virtual learning delivers business value.

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Can virtual learning be as effective as face-to-face learning?

☐ Yes

☐ No

☐ Maybe

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Why does virtual learning fail?

- Multitasking inhibits learning.
- Manager support is missing.
- Success is based on learning.
- The facilitator is missing.
- It is not designed for impact.



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Measures of Success

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

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What is ROI?

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

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

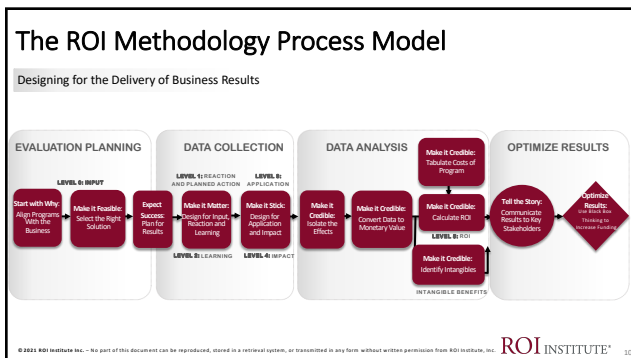
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What is ROI?

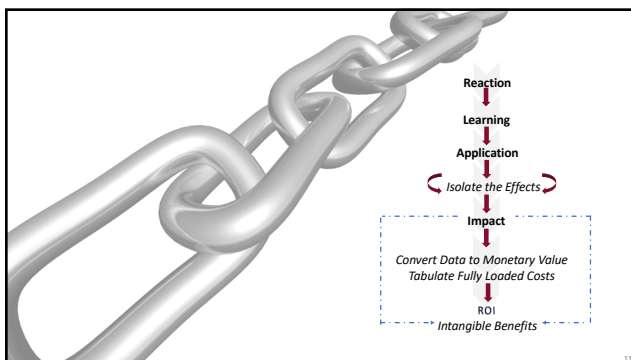
BCR = $\frac{\$750,000}{\$425,000}$

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

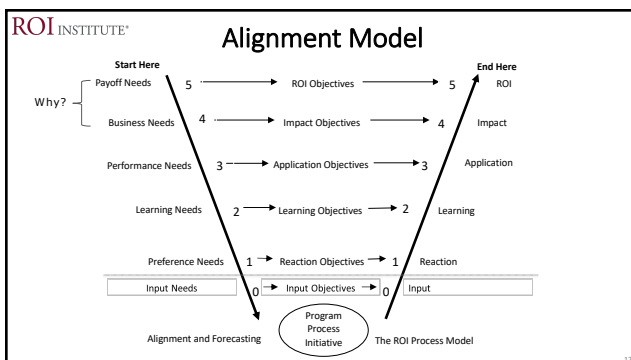
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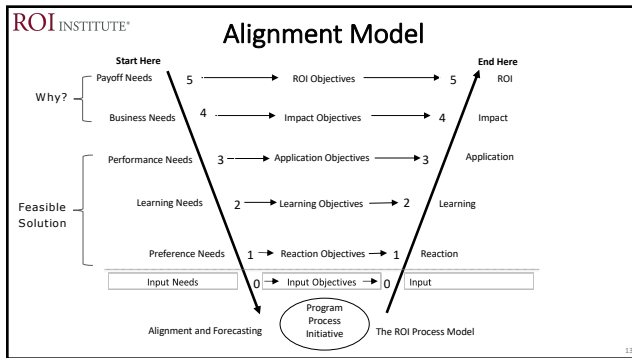
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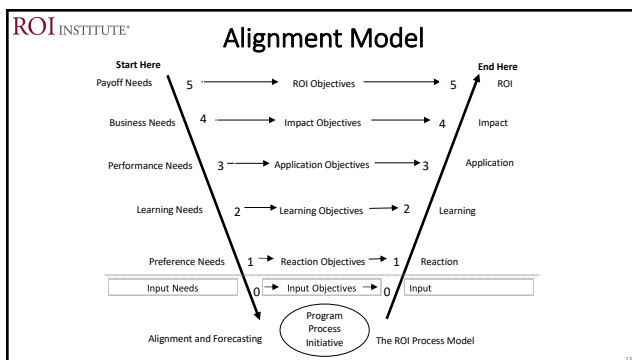
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Have a Discussion and Use Diagnostic Tools

Feasible solutions evolve through the understanding of context, empathizing with the target audience, and identifying performance gaps. The next step is to identify learning needs and how best to deliver relevant information. Forecasting outcomes based on inputs is sometimes helpful.

- Statistical process control
- Brainstorming
- Problem analysis
- Cause-and-effect diagram
- Force-field analysis
- Mind mapping
- Affinity diagrams
- Simulations
- Diagnostic instruments
- Focus groups
- Probing interviews
- Job satisfaction surveys
- Engagement surveys
- Exit interviews
- Exit surveys
- Nominal group technique

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Expect Success: Develop Objectives

Levels	Focus
Level 1, Reaction	Defines specific measures of expected reaction to the program as it is revealed and communicated to the stakeholders
Level 2, Learning	Defines specific measures of improvement in knowledge, information, contacts, and skills as the participants and other stakeholders learn how to make the program successful
Level 3, Application	Defines specific measures of actions taken that define success with application and implementation of program
Level 4, Impact	Defines the specific impact measures that will change or improve as a consequence of the program's implementation
Level 5, ROI	Defines the minimum return on investment from the program, comparing program costs with monetary benefits from the program

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Matching Evaluation Levels with Objectives

After completing this program, participants should:

1.	Decrease citizen complaints by 20% in one year.	
2.	Use problem-solving skills to uncover product defect causes.	
3.	Be able to demonstrate the five steps to calm an upset customer.	
4.	Rate the facilitator 4 out of 5 on presentation skills.	
5.	Decrease the amount of time required to develop a proposal.	
6.	Achieve a 20% ROI one year after implementation of sales incentive system.	
7.	Perceive the content to be relevant their situation (4.5 out of 5).	
8.	Decrease security breaches by 25% in six months.	
9.	Conduct a proper investigation using the seven-step process in 95% of complaint situations.	
10.	Score an average of 75 or better on new strategy quiz.	
11.	Complete a disclosure form each year as part of the new ethics policy.	
12.	Use all 10 negotiation skills in at least 50% of negotiation situations.	

1 = Reaction 2 = Learning 3 = Application 4 = Impact 5 = ROI

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The point of an effective interface, whether for a computer or a doorknob, must begin with an analysis of what a person is trying to do rather than with a metaphor or a notion of what the screen should display.

—Don Norman
Director of The Design Lab at University of California

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Design for Application and Impact

	Timeframe		
	Before	During	After
Role-Players*	Manager		
	Participant		
	Facilitator/ Organizer		

*Replace role players with whomever is most influential for your program.

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Data Collection Methods

Method	Level			
	1	2	3	4
• Surveys	✓	✓	✓	
• Questionnaires	✓	✓	✓	✓
• Observation	✓	✓	✓	
• Interviews	✓	✓	✓	
• Focus Groups	✓	✓	✓	
• Tests/Quizzes		✓		
• Demonstrations		✓		
• Simulations		✓		
• Action planning/improvement plans			✓	✓
• Performance contracting			✓	✓
• Performance monitoring				✓

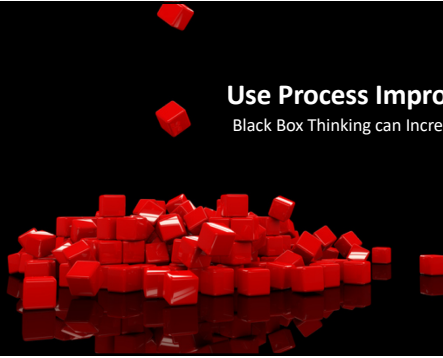
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Population

Sample

Use Sampling to Measure Application and Impact

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Use Process Improvement

Black Box Thinking can Increase Funding

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Blend Solutions to Make Learning Better

Awareness and Alignment	Learning, Engagement, and Practice	Application, Impact, and Reporting
Technology Based 30 min e-learning - Awareness - Decision to improve 30 min e-learning - Program design - Process flow 30 min e-learning - Customization - Learning styles - Cultural adjustment 30 min e-learning survey 360-degree feedback - Use - Rules 30 min e-learning - Alignment - Business impact measures - Making the connection	Classroom Two Days - Expectations and commitment 360-degree feedback 10 skills of high-performance teams - Skill videos - Realistic practice - Engagement and reflection - Skill-impact linkage - Planning - Business impact - Behaviors or action	On the Job - Connect with manager and coach - Implement actions - Make adjustments - Review videos - Use tools - Use portal - Impact capture - Analysis - Documentation - Reporting - Sharing

Source: Phillips, P. F. and Phillips, J. P. (2008). Measuring ROI in Leadership Performance: Fashion Stores, Inc. In Value for Money Measuring the ROI of Non-Capital Investments Volume I. ROI Institute, Inc., pp.285-308.

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Start with Why	
Payoff Opportunity	- Potential increase in revenue from ProfitPro \$1,000 to \$3,000 per upgrade for 12,000+ users - Maintain competitive advantage
Business Needs	Upgrade sales to existing customers
Performance Needs	- Demonstrate new features - Describe business case for upgrading - Demonstrate how upgrades will lead to greater profitability - Implementation and support
Learning Needs	- Rationale for upgrade - Key features - Upgrade contribution to client profitability
Preference Needs	- Flexible solution - Accessible to 200 sales reps across US - Avoid cost of travel and time off job

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Mobile Learning Solution

- Five Modules
 - rationale for the upgrade
 - key features of the upgrade
 - how the upgrade will increase existing customer profitability (time savings, quality improvements, and productivity)
 - pricing options
 - implementation and support.
- Target first 25 Sales Representatives accessing the modules
- Content must be relevant
- Five quiz questions per module
- Immediate use of skills
- Routine use of each major skill within one month
- Sales should occur within three weeks
- Associates should reach \$10,000 in sales per month within three months
- Target ROI: 20%

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Make it Matter

Reaction Results

Rate the Following	Rating
Relevant to my work	4.3
Important to my success	4.1
Intent to use	4.7
Recommend to others	4.2
Target: 4.0	Average: 4.3

(Scale: 1 = not at all; 2 = some; 3 = average; 4 = above average; 5 = very much)

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Make it Matter

Learning Results

Module	Quiz Categories	Avg. Number of Correct Responses
1	Rationale for the upgrade	4.3
2	Key features of the upgrade	4.2
3	How upgrade will increase client profit	4.3
4	Pricing options	4.1
5	Implementation and support	3.9
Possible score: 25		Average: 20.8
Target: 20		

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Make it Stick

Application Results

Extent of Use in One Month	Rating
Make the first call (target: 5 days)	3.5 days
Explaining the rationale for upgrade	4.2
Identifying key features of upgrade	4.3
Describing how the upgrade increases client profit	4.1
Identifying pricing options	3.9
Explaining implementation and support	3.8
Target: 4.0	Average: 4.06

(Scale: 1 = not at all; 2 = some use; 3 = moderate amount of use; 4 = significant amount of use; 5 = very significant amount of use)

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Make it Stick

Enablers and Barriers

Enablers		Barriers	
• Management encouragement	60%	• Lack of time to be involved	12%
• Easy to use	52%	• Lack of management encouragement	8%
• Timely	48%	• Took too long to complete	8%
• Convenient	40%	• Technology issues	4%
• Relevant	36%	• Other	4%
• Other	16%		

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Make it Credible

Impact Results

Group	Avg. Sales (Month 3)	Avg. Time to First Sale
Trial (Experimental) Group 25 sales associates	\$7,500	11 days
Comparison (Control) Group 19 sales associates (out of 22)	\$3,700	21 days
Difference	\$3,800	
Annualized = \$3,800 x 12 x 25 = \$1,140,000		
20% profit = \$228,000		

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Make it Credible

Program Costs

Needs assessment	\$3,000
Design and development (\$56,000/110 x 25)	\$12,725
Mobile device (prorated)	\$1,700
Sales associate time	\$2,524
Administration time	\$6,000
Project management	\$14,500
Evaluation	\$15,000
Total	\$55,449

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What is ROI?

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

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

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What is ROI?

BCR =

\$228,000

\$55,449

ROI =

\$228,000 - \$55,449

\$55,449

x 100

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Make it Credible

Intangible Benefits

- Made the first sale in 11 days, average
- Customer satisfaction
- Brand awareness for ProfitPro
- Job satisfaction of sales associates
- Stress reduction for sales associates
- Company reputation

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The Payoff

- 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.
- 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".

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Be Proactive

Remember, when it comes to delivering results:

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

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

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Write in the chat box:
What is your **one takeaway** from today's session?

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SCAN ME



Scan the **QR code** or **click the link below** to access resources from today's session.

<https://roiinstitute.net/atd-birmingham-designing-virtual-learning-to-deliver-impact-and-roi/>

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Measuring the Impact and ROI of Virtual Learning

Live Virtual Boot Camp

June 9, 2021
9 am-3 pm CDT



<https://www.roiinstituteacademy.com/impact-virtual-learning>

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

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Measuring the Impact and ROI of DEI

Live Virtual Boot Camp

June 24, 2021
9 am-2 pm CDT



<https://www.roiinstituteacademy.com/ROI-DEI-boot-camp>

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June 14-25 — Live Virtual	September 27-October 1 — New Orleans, LA
August 2-6 — Columbus, Ohio	October 4-8 — Atlanta, GA
August 3-September 16 — Live Virtual (Delivered in Spanish)	October 18-22 — Boston, MA
August 23-27 — Salt Lake City, Utah	

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