



# Presenting Results to Senior Management

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## Presenting Results to Senior Management

Perhaps one of the most challenging and stressful types of communication is presenting an impact or ROI study to the senior management team, which is usually the client for a program. The challenge is convincing this highly skeptical and critical group that positive results have been achieved (assuming they have) in a very reasonable timeframe, addressing the salient points, and making sure the managers understand the process. Two potential reactions can create problems. First, if the results are very impressive, having the managers accept the data may be difficult. On the other extreme, if the data are negative, ensuring that managers don't overreact to the results and look for someone to blame is important. Several guidelines can help ensure that this process is planned and executed properly.

Arrange a face-to-face meeting with senior team members to review the results. If they are unfamiliar with the ROI Methodology, this meeting is necessary to make sure they understand the process. The good news is that they will probably attend the meeting because they may have never seen ROI data developed for this type of program. The bad news is that it takes precious executive time, usually about 30 minutes, for this presentation. When a particular audience is familiar with the process, a brief version may be developed, such as a one-page summary of results.

The results should not be disseminated before the initial presentation or even during the session but should be saved until the end of the session. This will allow enough time to present the process and collect reactions to it before the target audience sees the ROI calculation. Present the ROI Methodology step by step, showing how the data were collected, when they were collected, who provided them, how the effect of the program was isolated from other influences, and how data were converted to monetary values. The various assumptions, adjustments, and conservative approaches are presented along with the total cost of the program so that the target audience will begin to buy into the process of developing the ROI.

When the data are actually presented, the results are revealed one level at a time, starting with Level 1, moving through Level 5, and ending with the intangibles. This allows the audience to observe the reaction, learning, application and implementation, business impact, and ROI procedures. After some discussion of the meaning of the ROI, the intangible measures are presented. Allocate time for each level as appropriate for the audience. This helps to defuse potential emotional reactions to a very positive or negative ROI.

Show the consequences of additional accuracy if this is an issue. The trade-off for more accuracy and validity often is more expense. Address this issue when necessary, agreeing to add more data if they are required. Collect concerns, reactions, and issues involving the process and adjust accordingly for the next presentation.

Collectively, these steps will help in the preparation and presentation of one of the most important meetings in the ROI Methodology. Figure 1 shows the recommended approach to an important meeting with the sponsor.

Figure 1. Guidelines for an Executive Briefing.

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**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.

**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.

**Follow This Presentation Sequence (with Suggested Timing):**

1. Describe the program and explain why it is being evaluated. (2 minutes)
  2. Present the ROI Methodology process. (3 minutes)
  3. Present the reaction and learning data. (2 minutes)
  4. Present the application data. (2 minutes)
  5. List the barriers and enablers to success. (2 minutes)
  6. Address the business impact, including the program's impact and converting data to money. (8 minutes)
  7. Show the costs. (2 minutes)
  8. Present the ROI. (2 minutes)
  9. Show the intangibles. (2 minutes)
  10. Review the credibility of the data. (2 minutes)
  11. Summarize the conclusions. (1 minute)
  12. Present the recommendations. (2 minutes)
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For an example of how this briefing is conducted, download [The Joan Kravitz Story](#).

A digital presentation from an executive briefing is available for download.