ROI INSTITUTE®

Designing Virtual Learning to Deliver Application, Impact and ROI

Patti P. Phillips, Ph.D. CPT
CEO, ROI Institute, Inc.

Are you a member of ISPI?

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Why you should be.

1. **Network** with like-minded professionals.
2. **Develop** capability – both personally and professionally.
3. **Achieve** project-based certifications that provide evidence of your performance improvement acumen and skill including
    1. Certified Human Performance Technologist (CPT)
    2. Certified Facilitator of Training (CFT)
    3. Certified Developer of Training (CDT)
4. **Access** tools and resources that will help you make informed decisions, set priorities, development the appropriate solutions give the performance gaps you are trying to close, and more.
5. **Ideate and innovate** with the best in performance improvement – consider ISPI your professional sandbox!

How you can be.

- Student Membership
- Individual Memberships
    - Gold
    - Silver
    - Bronze
- Corporate Memberships
    - Advocate
    - Patron
    - Organizational

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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.

Resources

APPLICATION GUIDE
The ROI Methodology®
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
that generates six types of data:
Learning
Impact
Intangibles
program, or solution.
ROI INSTITUTE®
FROM RESEARCH TO PRACTICE SERIES
THIRTY TECHNIQUES TO DESIGN VIRTUAL LEARNING TO DELIVER IMPACT AND A POSITIVE ROI
PATTI P. PHILLIPS, PH.D.
JACK J. PHILLIPS, PH.D.
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Updating Your Evaluation Strategy
A Working Session to Develop a Strategy and Plan for Assessment, Measurement, Evaluation, and Analytics
ROI INSTITUTE®
A Road Map to Business Results and Increased Funding
Measuring the Success of Learning Through Technology
A Step-by-Step Guide for Measuring Impact and ROI on E-Learning, Blended Learning, and Mobile Learning
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Designing Virtual Learning to Deliver Impact and ROI
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Rapid-fire chat

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

- ❑ Yes
- ❑ No
- ❑ Maybe

What prevents virtual learning from being effective?

Digital learning is the quickest growing market in the education industry, with a whopping **900%** growth since 2000.

KPMG

90% of corporations now use e-learning compared to just 4% in 1995.

KPMG, LinkedIn

Mobile learning (m-learning) is one of the fastest growing markets in e-learning, with an annual growth of **23%**.

Technavio

global corporate e-learning market size will be
billion by 2026. With an annual growth rate of
2020 to 2026, the corporate market will be or
iggest drivers of the e-learning industry.

ness Wire

orld's largest airliner manufacturer as of 2019, employ
oss 35 countries. Through establishing an e-learning
900 pieces of content, Airbus managed to cut down
f dollars. In addition to cost savings, the change had
ployee engagement and satisfaction levels.

eekly

learning industry is projected to surpass **$243 billion**.

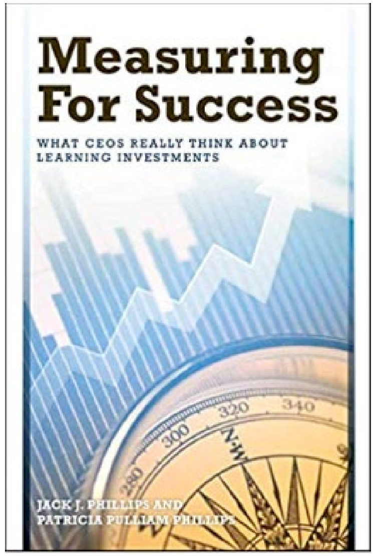
Yet, it is here to stay.

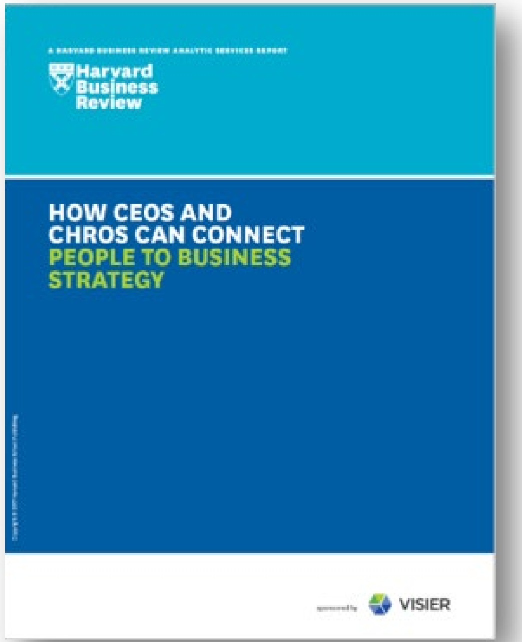
Senior leaders want impact and ROI.

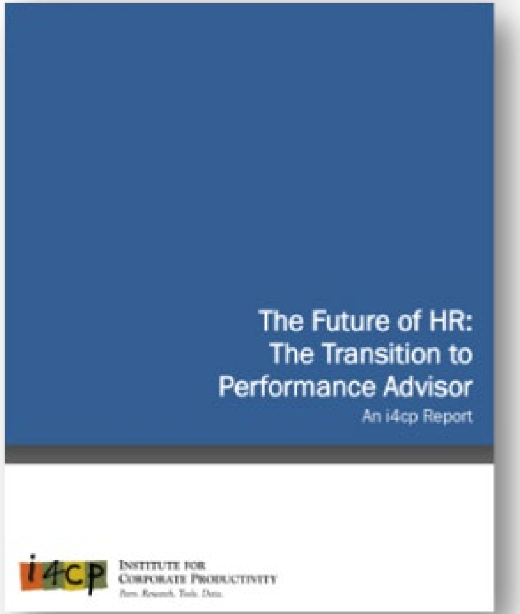
Sixty-seven percent of CEOs say they get a least a basic set of human capital metrics–but ***only 24% of survey respondents*** said HR also provides analytics that connect their people metrics to business metrics.

Really, the question isn't about relevance of the (HR) function or a 'seat at the table;" rather, it is ***what impact has HR made on the business***.

Seventy-four percent of CEOs report that they want ROI, but only 4% get it. Ninety-six percent of CEOs want impact; only 8% receive it now. ***Business impact data and ROI are the most important metrics*** in their decision making making about the learning investment.







How do we design virtual learning to deliver application, impact, and ROI?

Evaluation Framework

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 act
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

Katzell developed four steps of training evaluation; Kirkpatrick wrote about four steps of training evaluation; Phillips added economic theory and operationalized the framework by adding process and standards and applying it in practice in not only learning, but the broader HR community and beyond.

What is ROI?

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

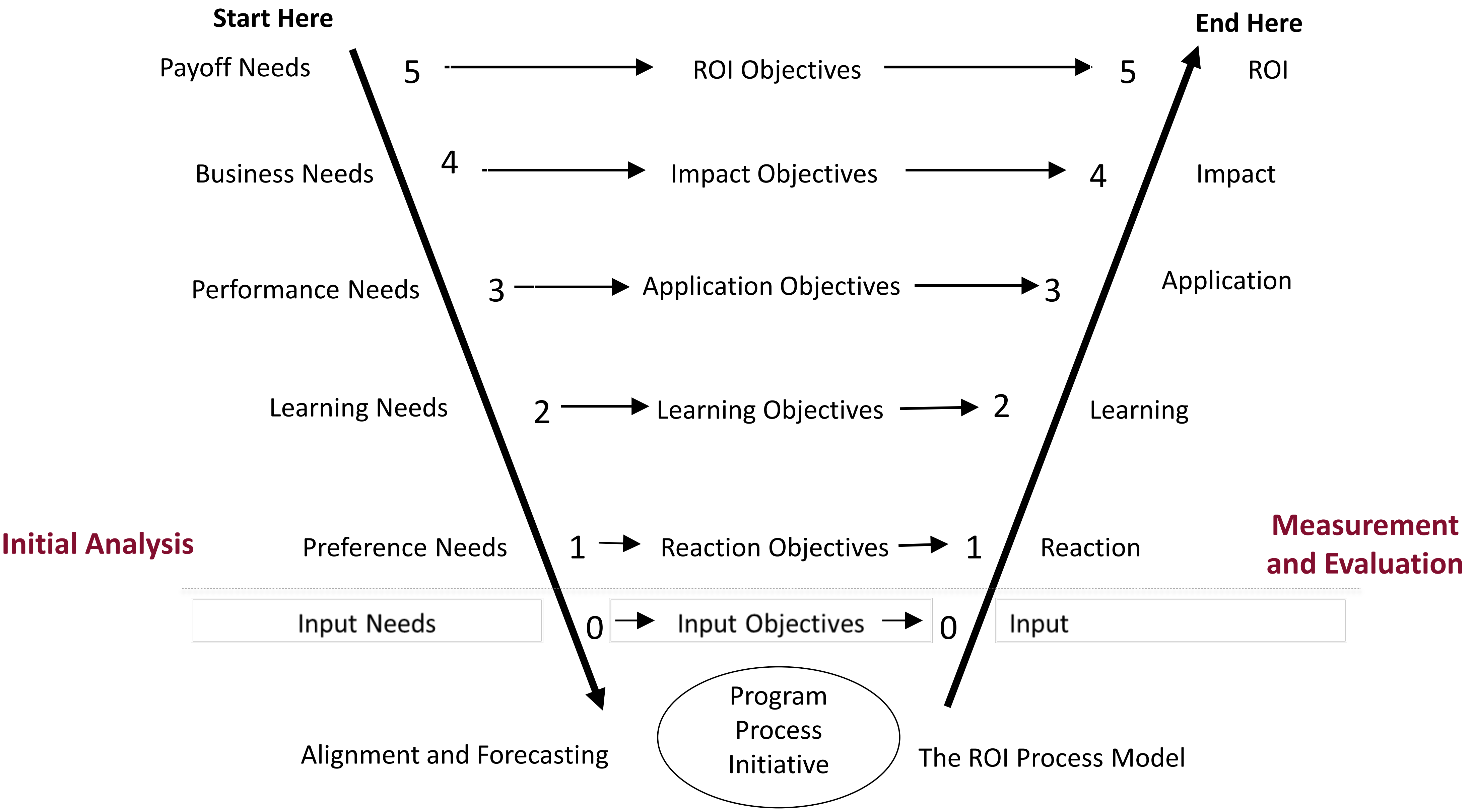
$$\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100$$

What is ROI?

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

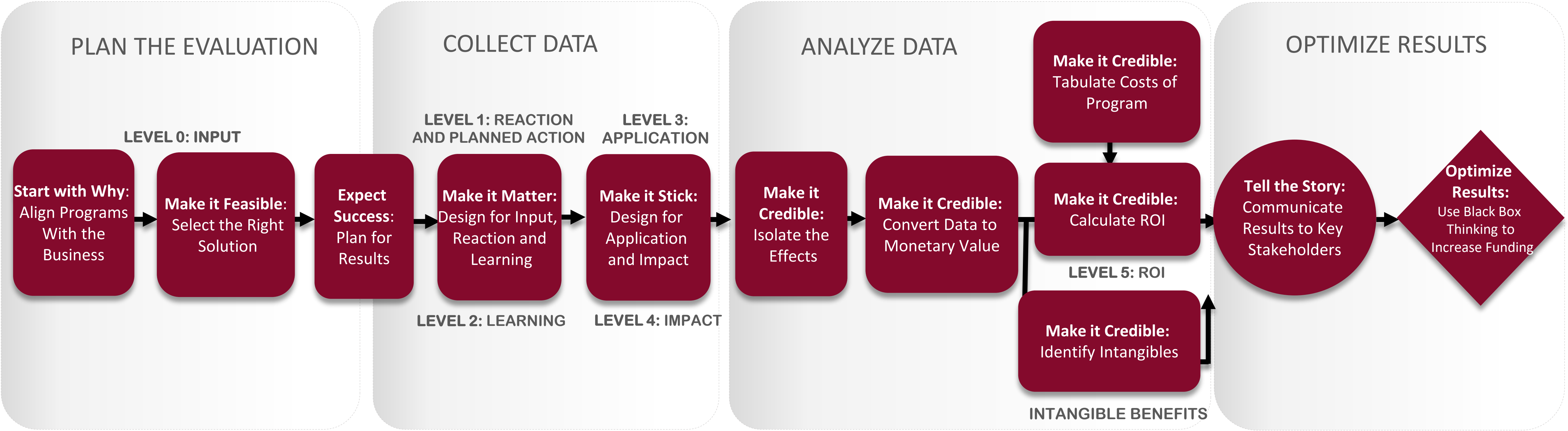
$$\text{ROI} = \frac{\$750{,}000 - \$425{,}000}{\$425{,}000} \times 100$$

Alignment Model



The ROI Methodology Process Model

Designing for the Delivery of Business Results



Leading in a Hybrid Work Environment: Program at A Glance

Assessment · Virtual Synchronous · Virtual Asynchronous · On-the-Job Application

AUGUST 15- 19 | AUGUST 12-25 | AUGUST 26 | AUGUST 29 to SEPTEMBER 2 | SEPTEMBER 6-9 | SEPTEMBER 12-16 | SEPTEMBER 19-23

Set Conditions for Success

SELF

OTHERS

Cohort Formed

Pre-Program Assessment
30 Minutes

Welcome Module
- Ice Breaker
- Set up profiles

1 Hour

Program Kickoff
- Program Overview
- Set Intentions

1 Hour

Week 1 Coaching & Caring for a Hybrid Team
- Understand the talent responsibilities of leaders
- Show empathy, coach to build trust and rapport

1 2 3 4 | Live
2 Hours | 1 Hr.
Analytics Dashboard

Week 2 Application
- Conduct results-based coaching session
- Coach by checking in
- Use 4-step empathy in team member conversation

1 2 3 4 | Debrief 1 Hr.

Week 3 Developing a Hybrid Team
- Clarify expectations and manage accountability
- Conduct positive performance conversations

1 2 3 4 | Live
2 Hours | 1 Hr.
Analytics Dashboard

Week 4 Application
- Give real-time feedback to team members
- Create a career dev plan for a team member
- Define 30, 60, 90-day DEI plan

1 2 3 4 | Debrief 1 Hr.

SEPTEMBER 26 - 30 | OCTOBER 3 - 6 | OCTOBER 7 | OCTOBER 10 - 14 | OCTOBER 18 - 19

TEAM

Celebrate

Measure and Report Impact

Week 5 Creating a Great Hybrid Work Place
- Create Employee Value Proposition
- Improve employee experience

1 2 3 4 | Live
2 Hours | 1 Hr.
Analytics Dashboard

Week 6 Application
- Conduct a “stay interview”
- Develop EVP
- Craft employee experience plan

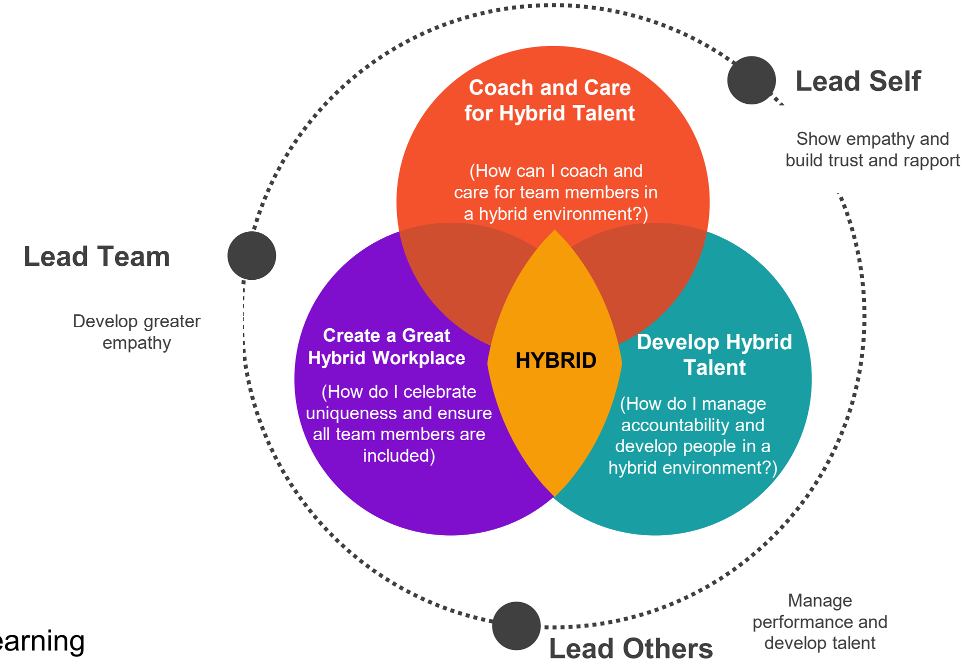
1 2 3 4 | Debrief 1 Hr.

Capstone
- Synthesize learnings
- Reflect on new behaviors

1.5 Hours

Post-Program Assessment
Analytics Insights Report

Conference Panel Discussion
October 18-19



Guiding Principles

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.

Chain of Impact

Inputs

↓

Reaction

↓

Learning

↓

Application

↓

Isolate the Effects of the Program

↓

Impact

↓

ROI

Intangible Benefits

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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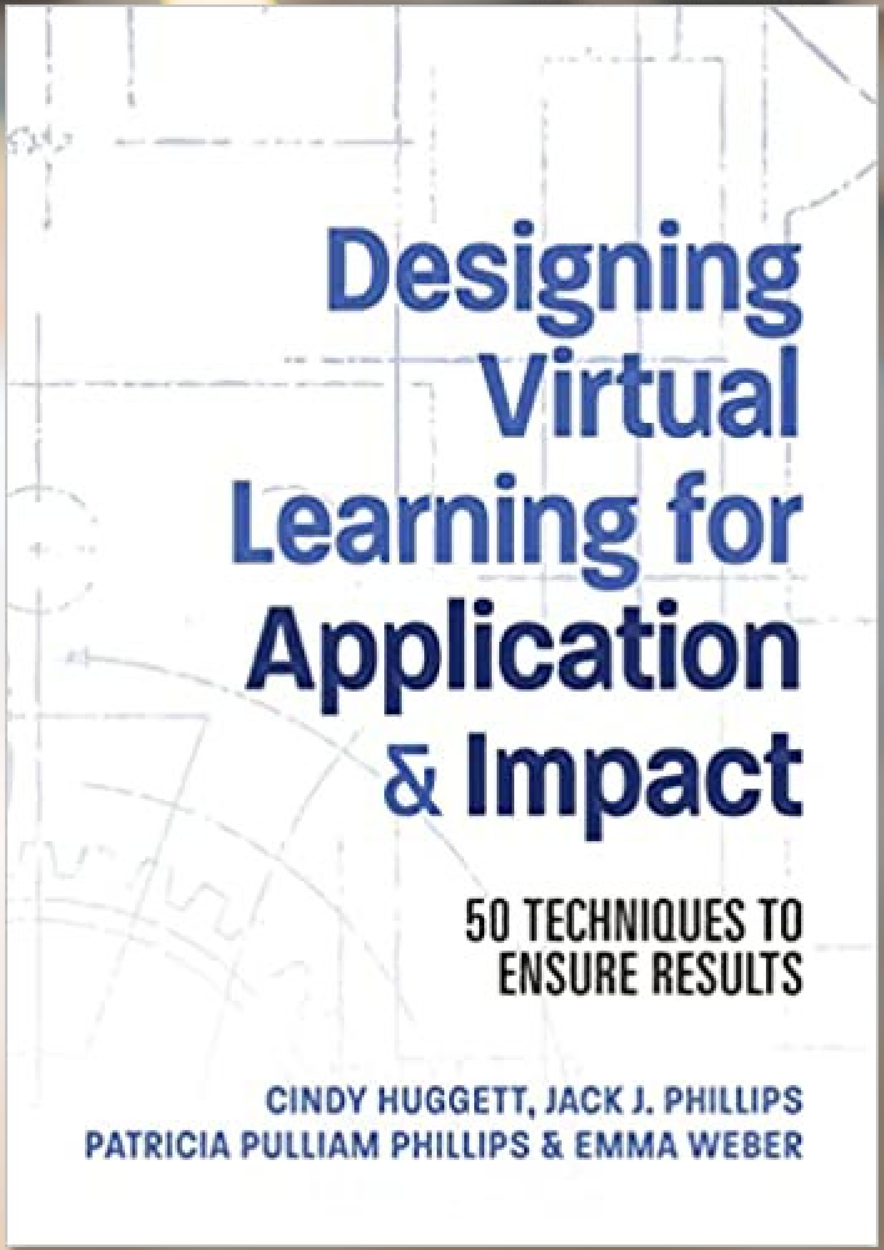
SCAN ME



Scan the QR code to access resources from today's session.

Questions?

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