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Patti P. Phillips, Ph.D., and Jack J. Phillips, Ph.D.
Co-Founders, ROI Institute, Inc.



Value Creation

- We are accountability, evaluation, and measurement thought leaders.
- We work across industries and sectors to help all professionals achieve success.



ROI Methodology

- We developed the ROI Methodology as a comprehensive system to measure the success of any type of endeavor.
- The methodology is the most used evaluation system in the world because it's a credible, CEO-friendly, and is a user-centered process.



Training Excellence

- We have trained more than 50,000 managers and professionals.
- Almost 20,000 individuals have participated in ROI Certification.



Awards & Recognition

- Top 50 Coaches in the World
- 2022 ATD Thought Leader Award Recipients

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Objectives

After this session, we hope you will use what you learn to:

- Change your approach to defining and achieving success while improving future results.
- Achieve success by delivering outcomes that matter.
- Add value to your work, your organization, and your community.



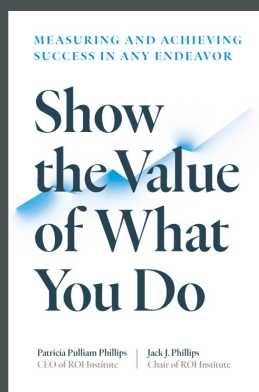
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Resources



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Relatable

It's full of stories and examples representing a broad range of settings.

Methodical

This book will show you how to measure and improve the success of your work in six easy steps.

Accountable

It's a process that will help you design for, deliver, and measure success.

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How do you measure the success of your projects now? (Select all that apply.)

- ☐ I capture reaction and perception data.
- ☐ I measure what team members know to make it successful.
- ☐ I measure what team members are doing to make it successful.
- ☐ I measure the impact of the project.
- ☐ I measure the financial ROI.



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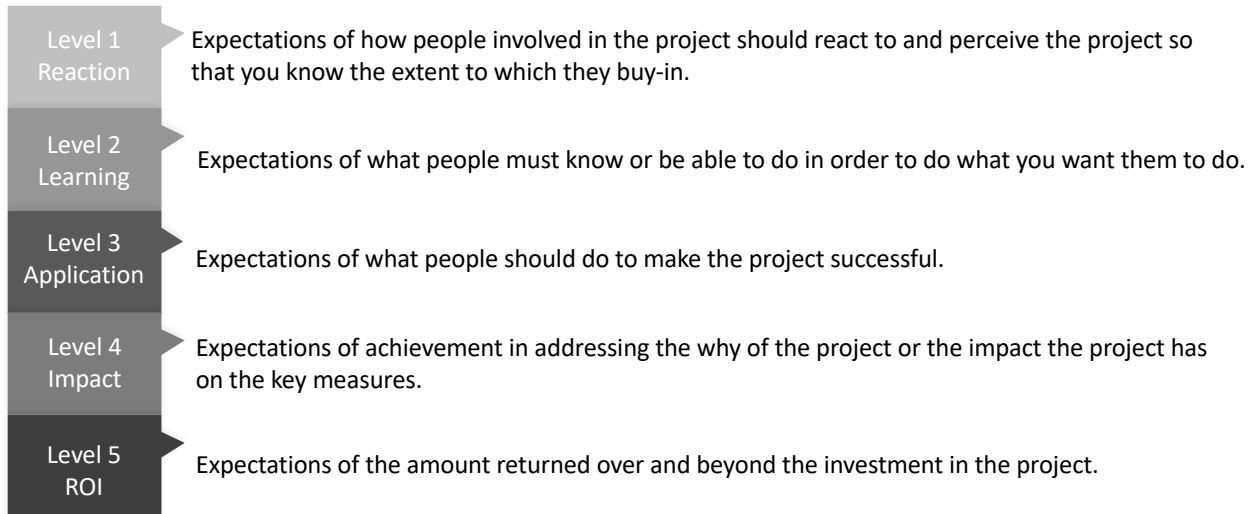
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Delivering and Measuring Success

Traditional Approach	Show the Value Approach
Start doing things with no end goal.	Start with the end in mind.
Have no system or process to achieve success.	Follow six steps to achieve success.
Rarely achieve the end goal.	Design for and achieve desired goals.
Focus on activities instead of results.	Deliver results on activities including impact and ROI.

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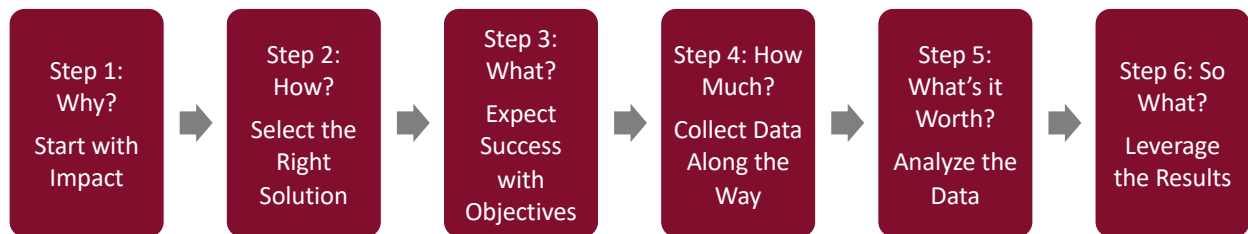


Five Levels of Success

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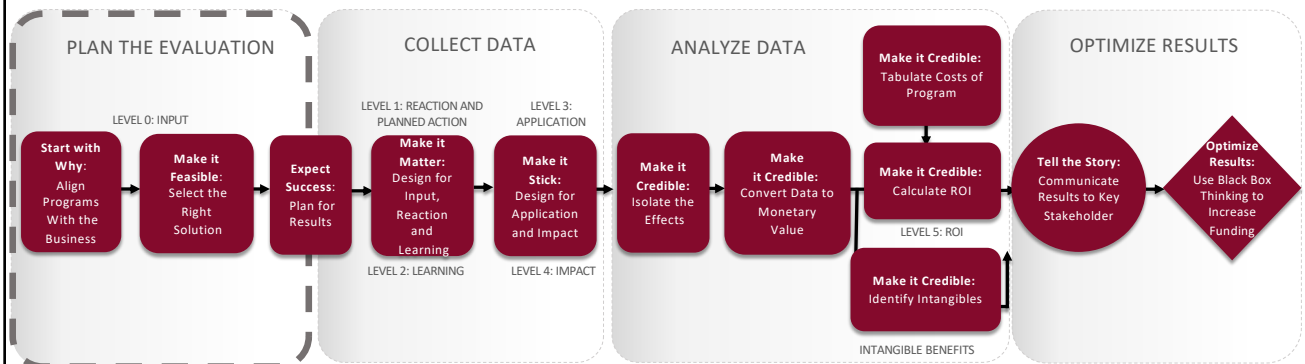
Show the Value Process



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The ROI Methodology Process Model

Designing for the Delivery of Business Results



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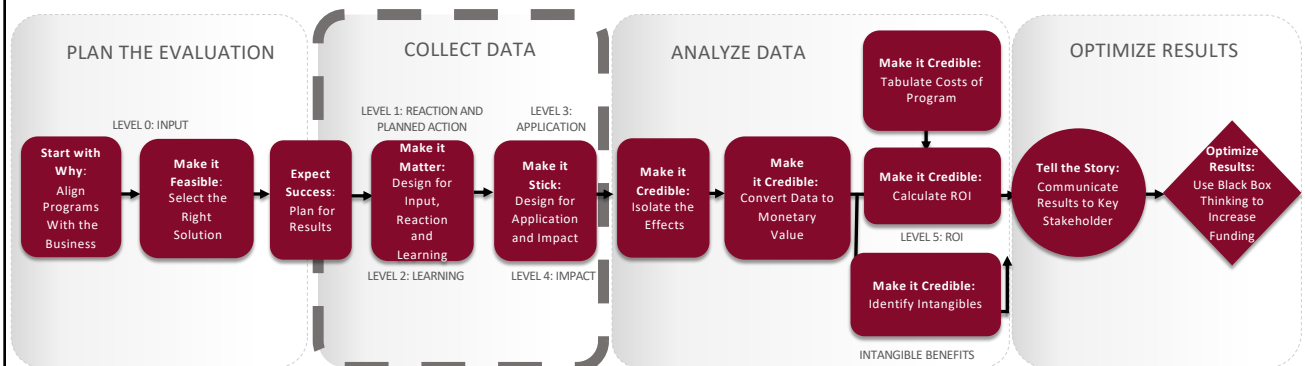
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The ROI Methodology Process Model

Designing for the Delivery of Business Results



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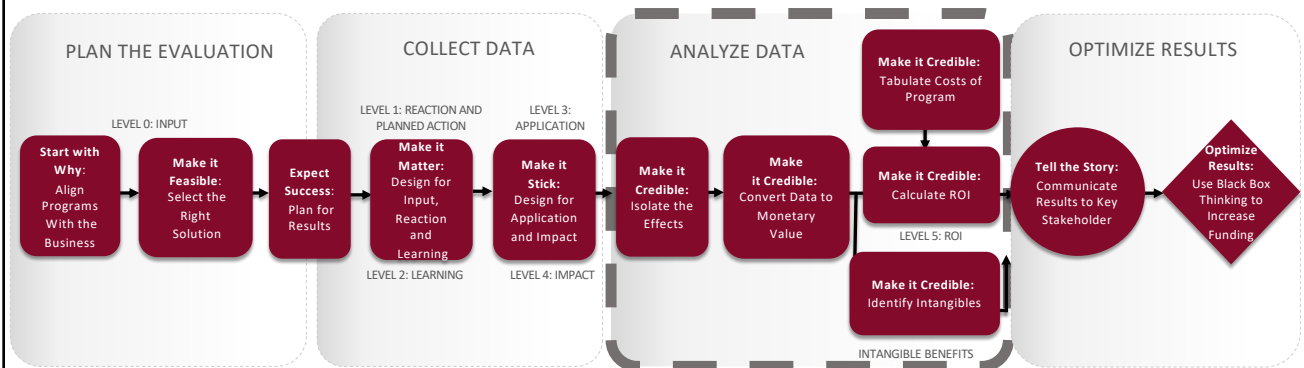
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The ROI Methodology Process Model

Designing for the Delivery of Business Results



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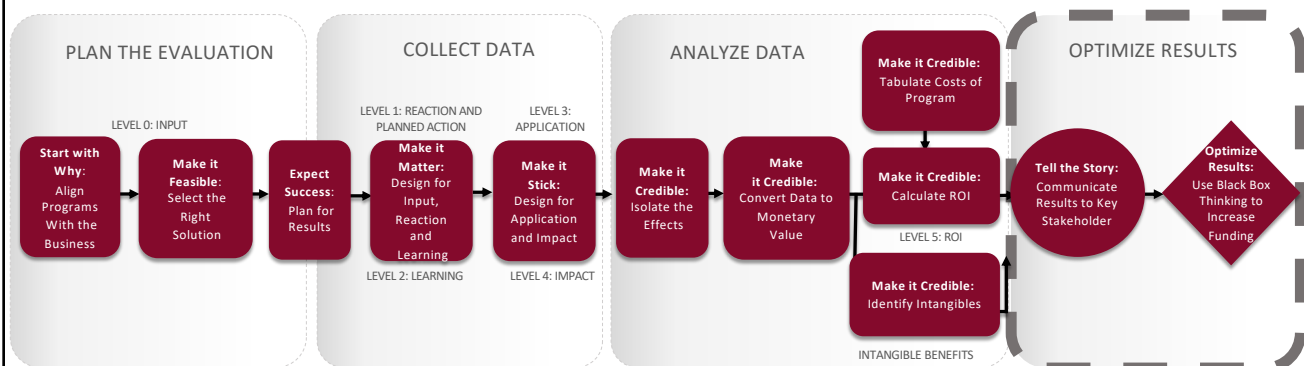
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The ROI Methodology Process Model

Designing for the Delivery of Business Results



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Why? Start with Impact: Paula Patel

- Begin with the end in mind
- Define impact
- Capture value before being asked

What is the impact of your project?

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How? Select the Right Solution: KC Swat Team

- Find a solution
- Performance that needs to change
- Learning that supports the change
- Preferences that need to be met
- Connect the dots

How do you know your solution is the
right solution?

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Finding the Right Solution

1. Examine the data and records.
2. Initiate the discussion.
3. Reference a case study.
4. Use benchmarking from similar solutions.
5. Use evaluation as the hook.
6. Involve others in the discussion.
7. Discuss disasters in other places.
8. Use diagnostic tools.



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What? Expect Success with Objectives: Poverty Stoplight

- How to achieve success
- The power of objectives
- Specificity drives results
- Communicate, communicate, communicate
- Plan the remainder of the journey



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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 causes of problems.	
3.	Be able to demonstrate the five steps to determine if there is a food security issue.	
4.	Rate the facilitator 4 out of 5 on presentation skills.	
5.	Decrease the amount of time required to develop a proposal by 25%.	
6.	Achieve a 20% ROI one year after program implementation.	
7.	Perceive the content to be relevant to actual situations (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.	

1 = Reaction

2 = Learning

3 = Application

4 = Impact

5 = ROI

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How Much? Collect Data along the Way: Renew America Together

- Data collection
- Data collection methods
- Minimize bias
- Timing

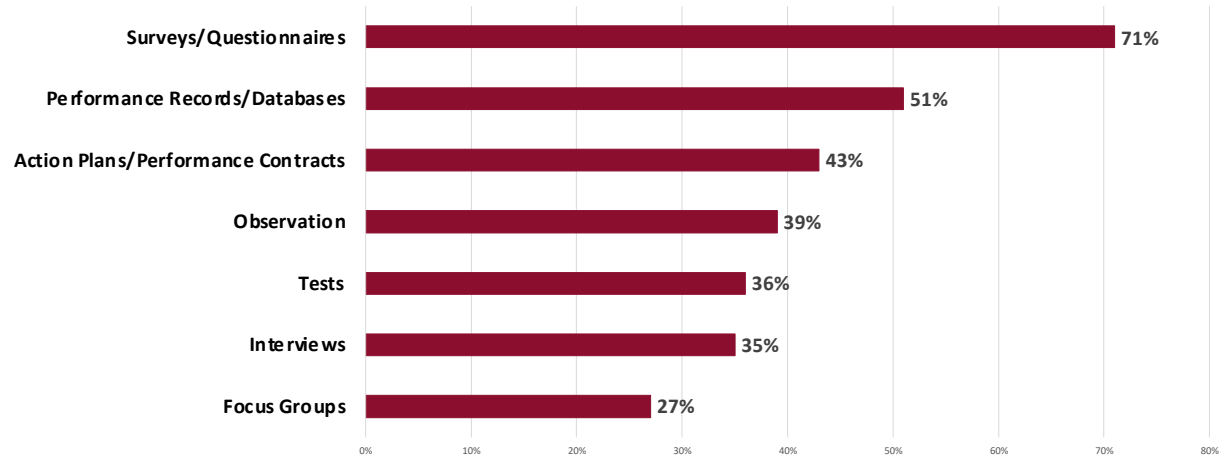
How will you capture your project's data?



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Data Collection Methods



*Survey of Users, N = 246

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What's it Worth? Analyze the Data: Jessica Kriegel

- Isolate project effects
- Convert data to money
- Determine the intangibles
- Tabulate fully-loaded costs
- Calculate the ROI

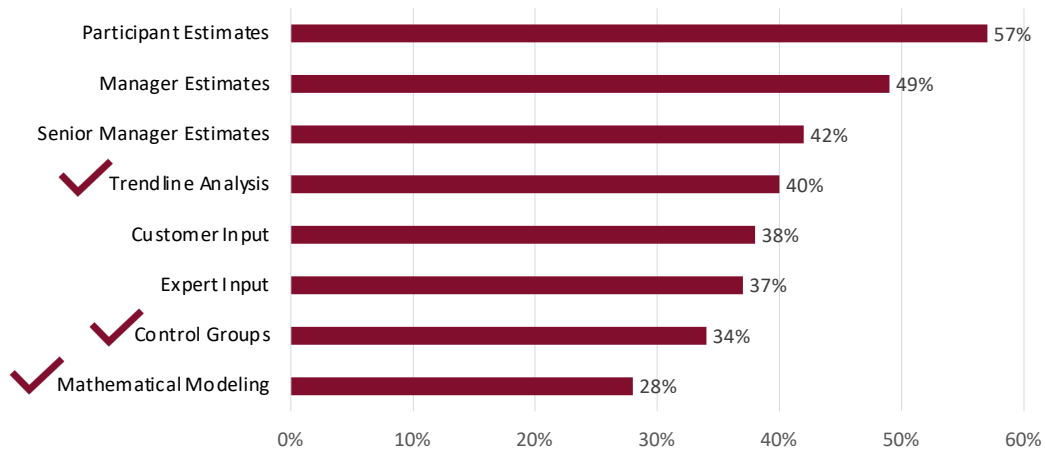
1. What is your approach to isolate the effect of your project?
2. What is your approach to converting data to money?



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Isolation Methods

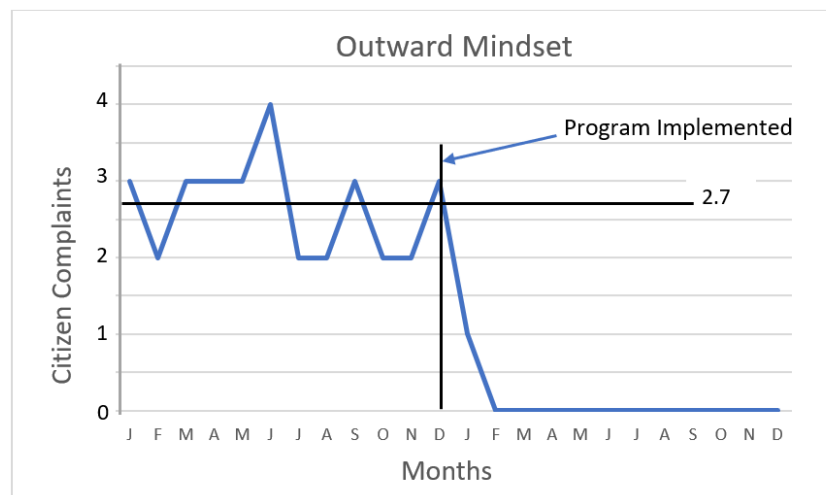


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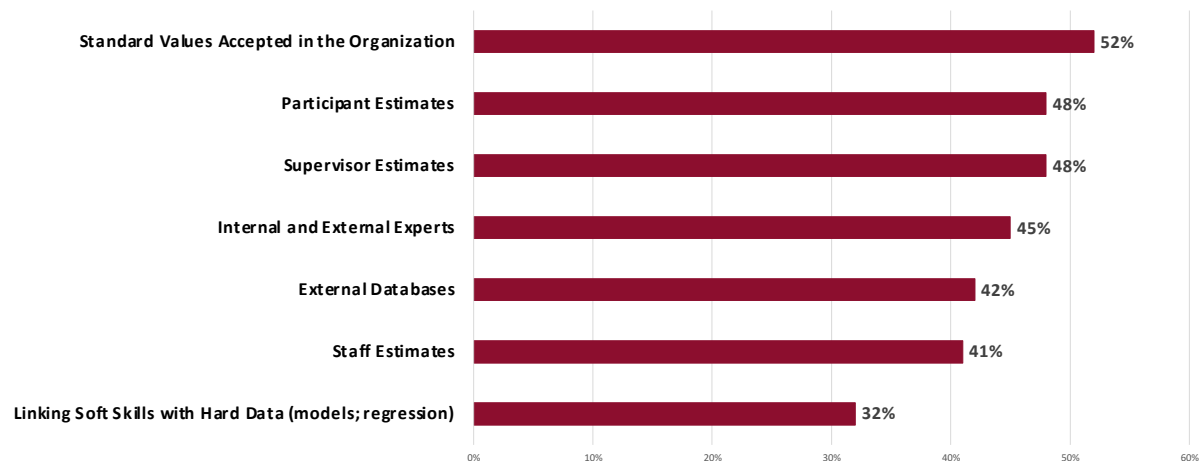
Trendline Analysis



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Data Conversion Methods



*Survey of Users, N = 246

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The Benefit-Cost Ratio and Return on Investment Calculations

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

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



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The Benefit-Cost Ratio and Return on Investment Calculations

$$\text{BCR} = \frac{\$2,100,000}{\$36,055}$$

$$\text{ROI} = \frac{\$2,100,000 - \$36,055}{\$36,055} \times 100$$



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So What? Leverage the Results: The Chaplains

- Communicate results
- Optimize results
- Leverage results

How will you use the results of your calculation?



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Rule	Its Meaning
Tell the complete story of success.	When conducting a higher level of evaluation, collect data at lower levels
Use the most credible sources.	When collecting and analyzing data, use only the most credible sources.
Choose the most conservative alternative.	When analyzing data, select the most conservative alternative for calculations.
Give credit where credit is due.	Use at least one method to isolate the effects of the solution.
Make no assumptions for nonrespondents.	If no improvement data are available for a population or from a specific source, assume that no improvement has occurred.
Adjust estimates for error.	Adjust estimates of improvement for the potential error in the estimates.
Omit the extremes.	Extreme data items and unsupported claims should not be used in ROI calculations.
Account for all project costs.	Fully load costs of the solution when analyzing ROI.

The Rules of the Road

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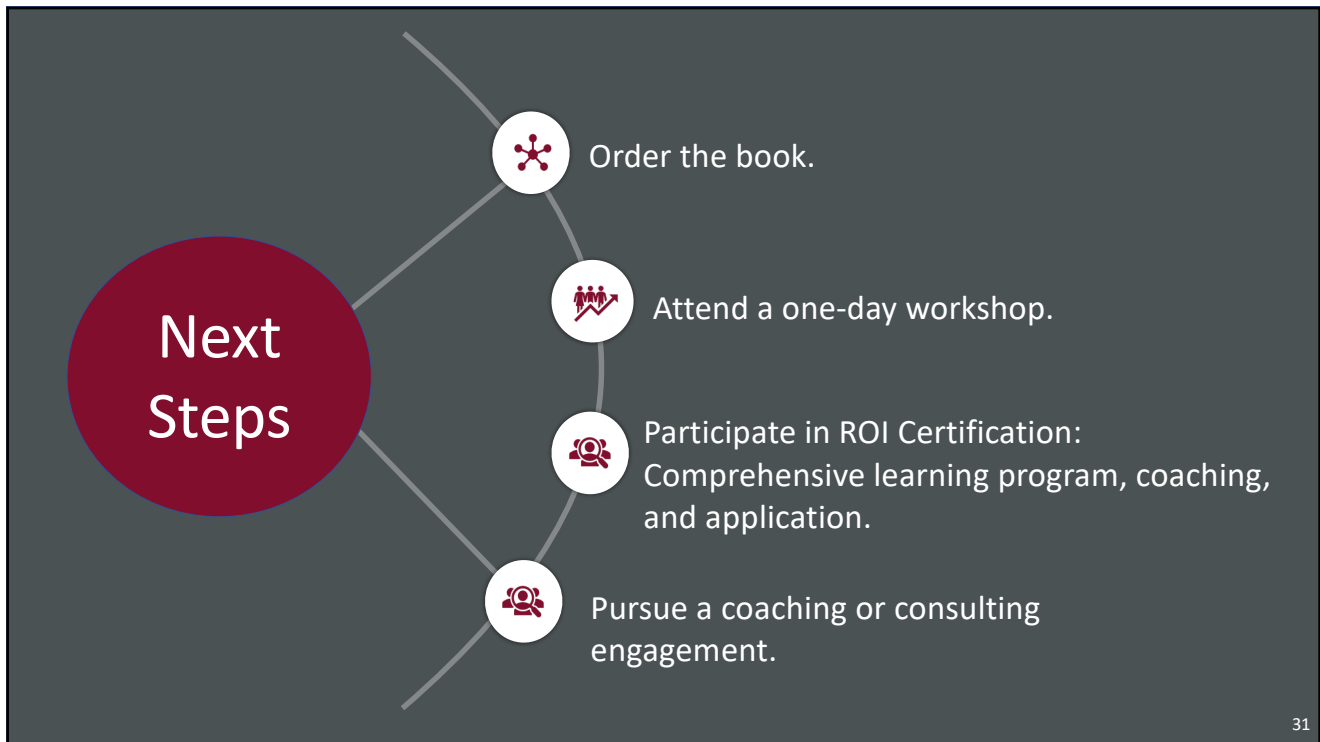


How will you use the content from today's presentation? (Select all that apply.)

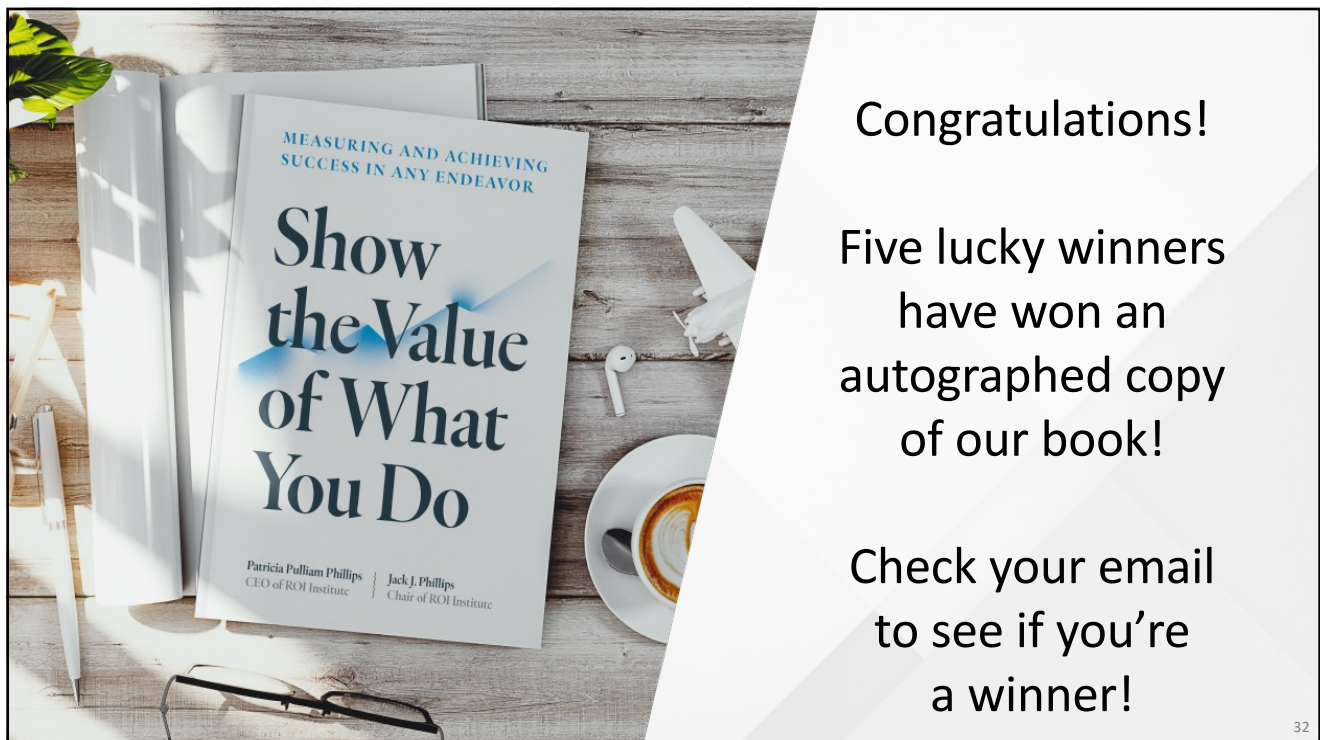
- A. I will align my project(s) to the business.
- B. I will plan (design) for project(s) to deliver impact.
- C. I will improve project objectives.
- D. I will evaluate project(s) to the impact level.
- E. I will leverage results to secure more funding and support.

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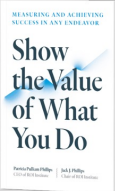
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Resources

Scan the QR Code to Access Resources





Questions?

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Jack@roiinstitute.net

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