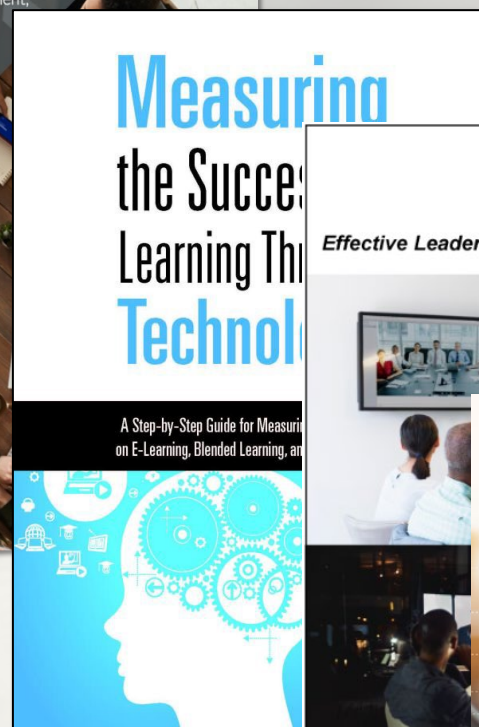
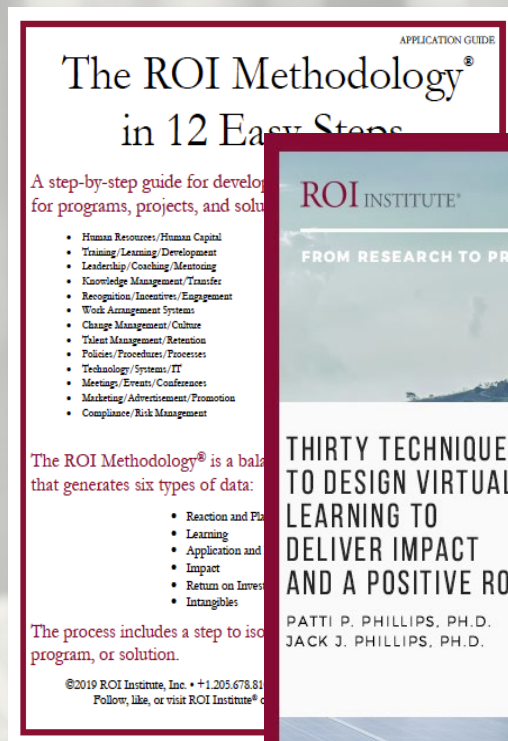


Designing Virtual Learning to Deliver Results

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

Resources

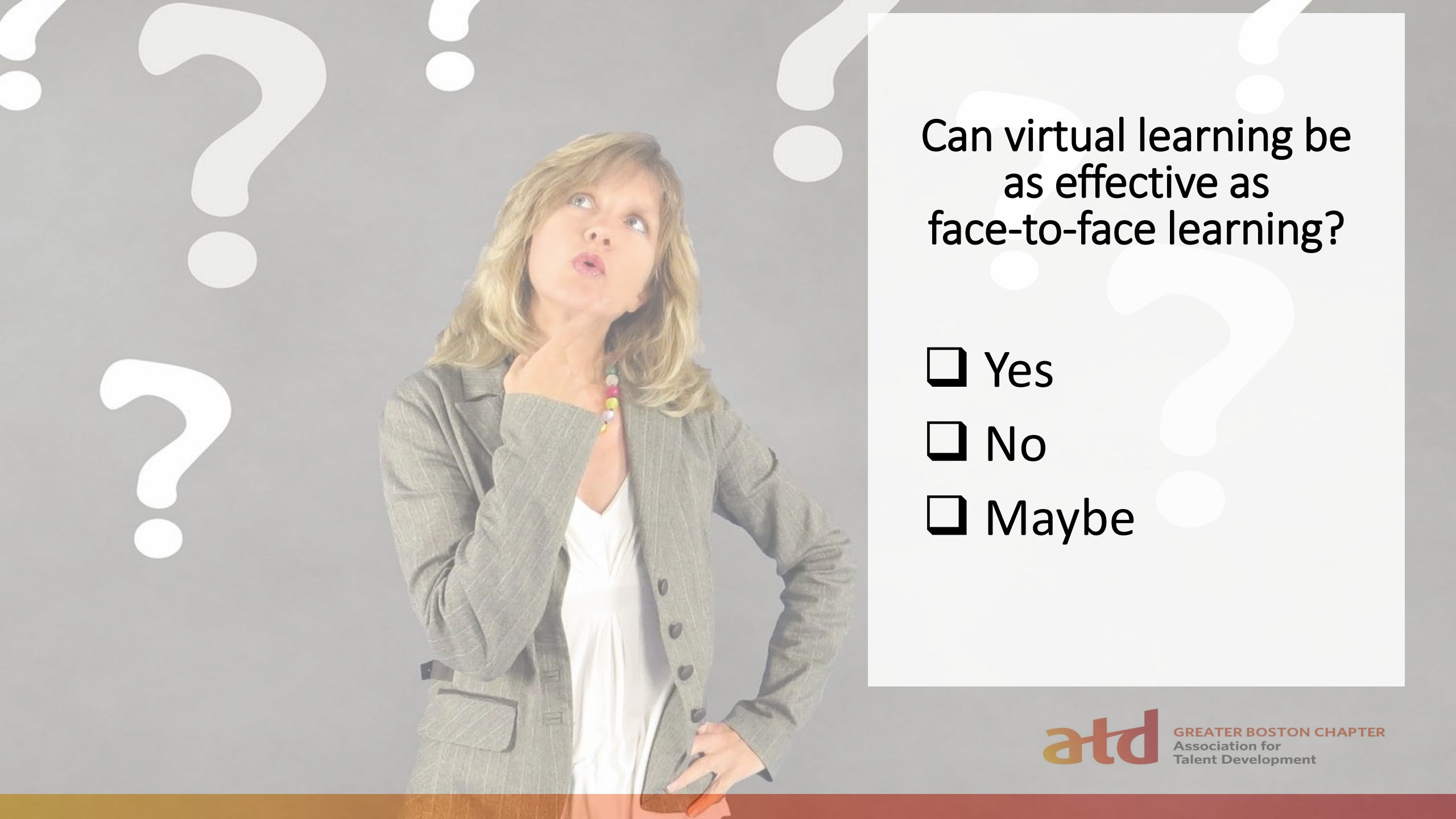


Session Objectives



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 results, including 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.



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

- ☐ Yes
- ☐ No
- ☐ Maybe

What prevents virtual learning from being effective?



What prevents virtual learning from being effective?

- Attendance driven.
- Multitasking inhibits learning.
- Technology breaks down.
- Content and experience focus versus performance focus.
- Manager support is missing.
- Facilitator is missing.
- No real consequence.
- It is not designed to deliver results.



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

KPMG



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 one of the biggest drivers of the e-learning industry.

Business Wire

e-learning industry is projected to surpass **\$243 billion**.

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



world's largest airliner manufacturer as of 2019, employs across 35 countries. Through establishing an e-learning program, Airbus managed to cut down 900 pieces of content, Airbus managed to cut down **of dollars**. In addition to cost savings, the change had a positive impact on employee engagement and satisfaction levels.

Forbes Weekly

Yet, it is here to stay.

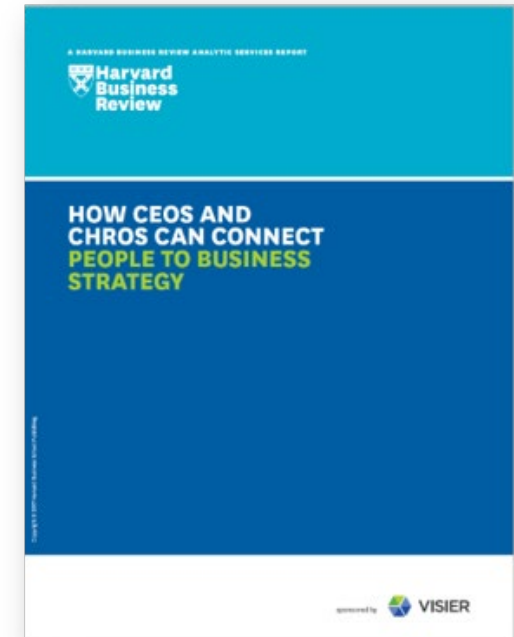
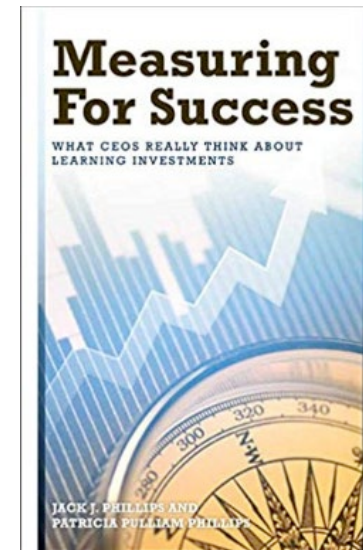
Senior leaders want impact and ROI.

Sixty-seven percent of CEOs say they get at 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?

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

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

What is ROI?

$$\text{BCR} = \frac{\$750,000}{\$425,000} = 1:76:1$$

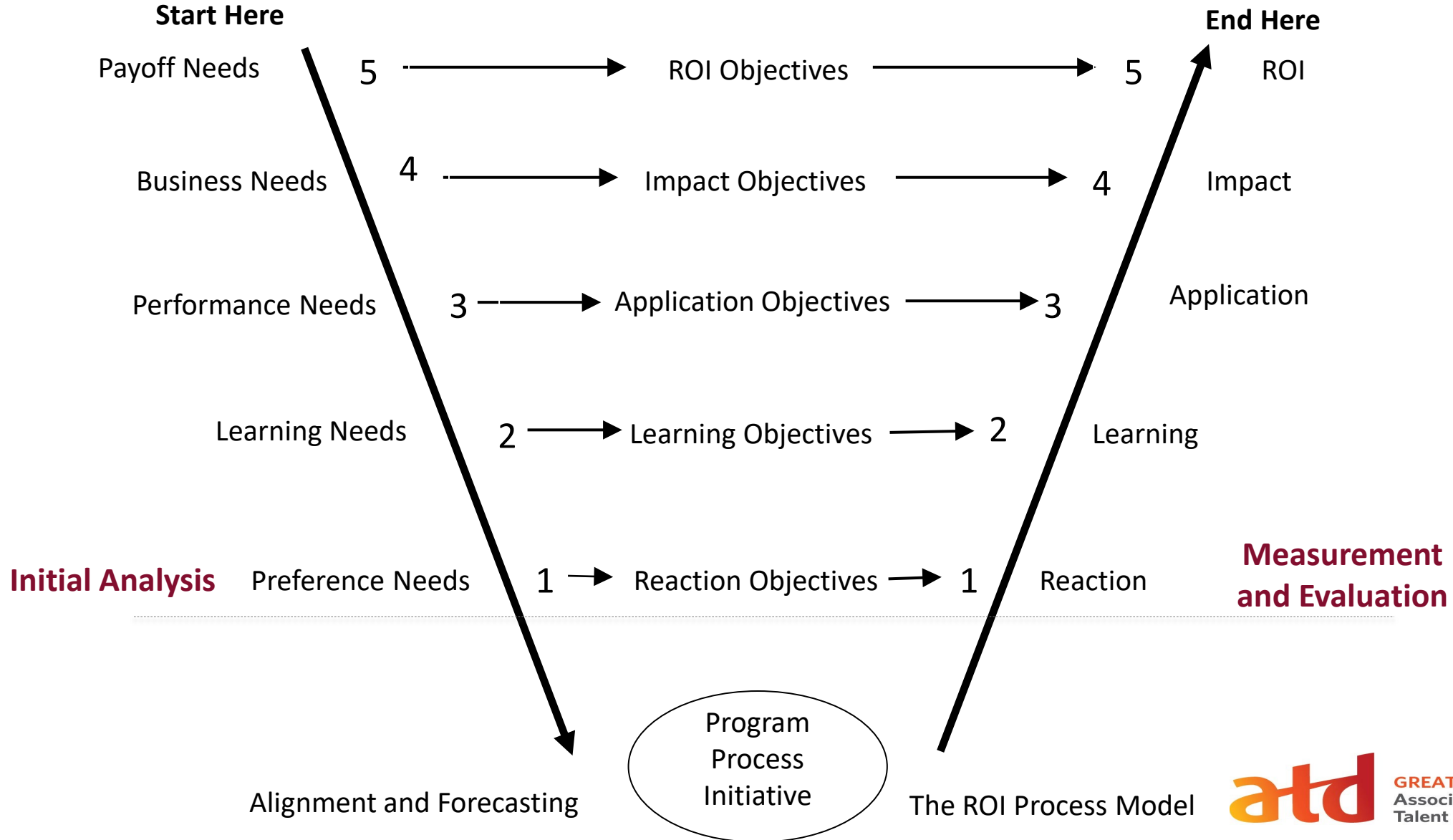
$$\text{ROI} = \frac{\$750,000 - \$425,000}{\$425,000} \times 100 = 76\%$$

Evaluation Framework

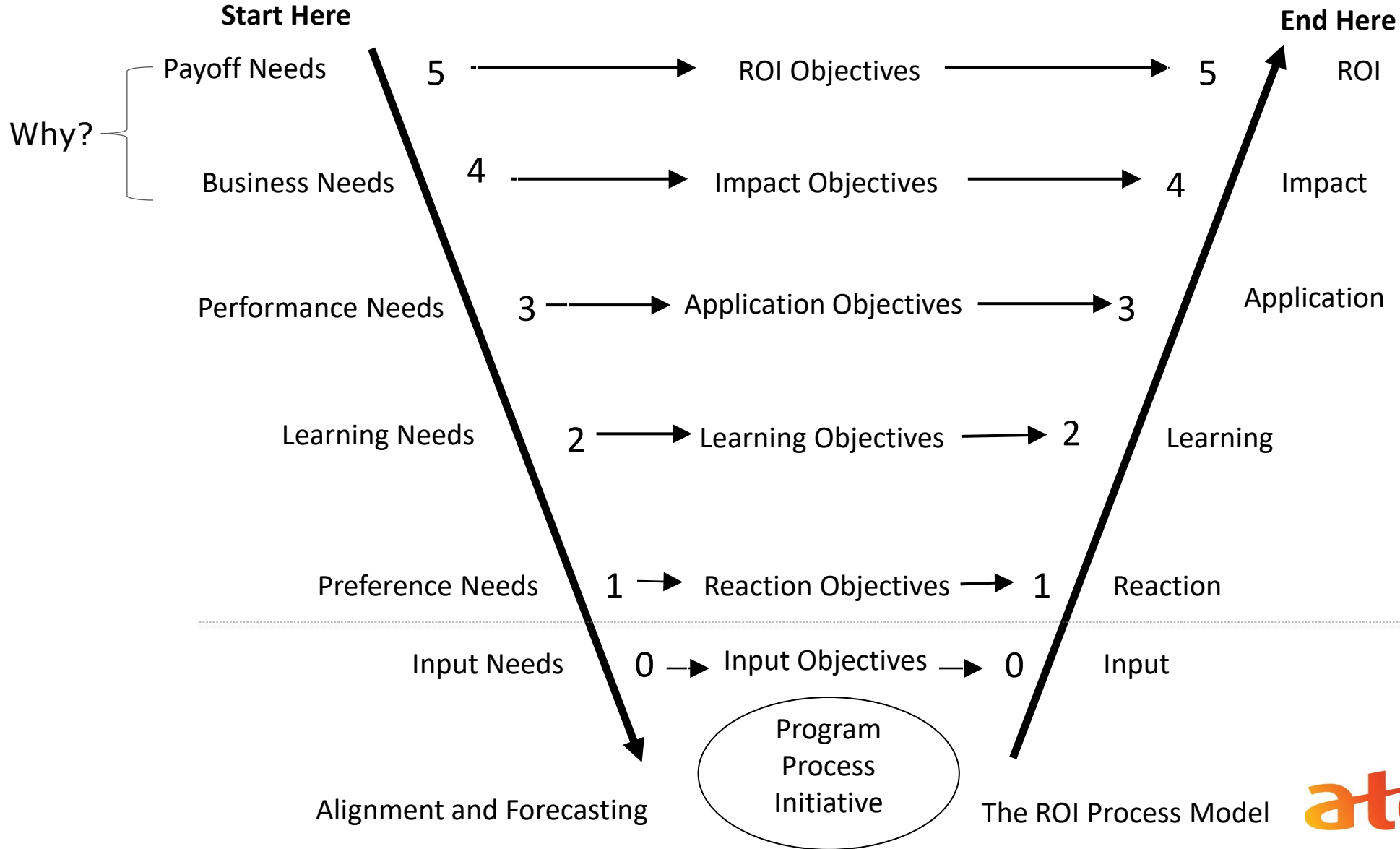
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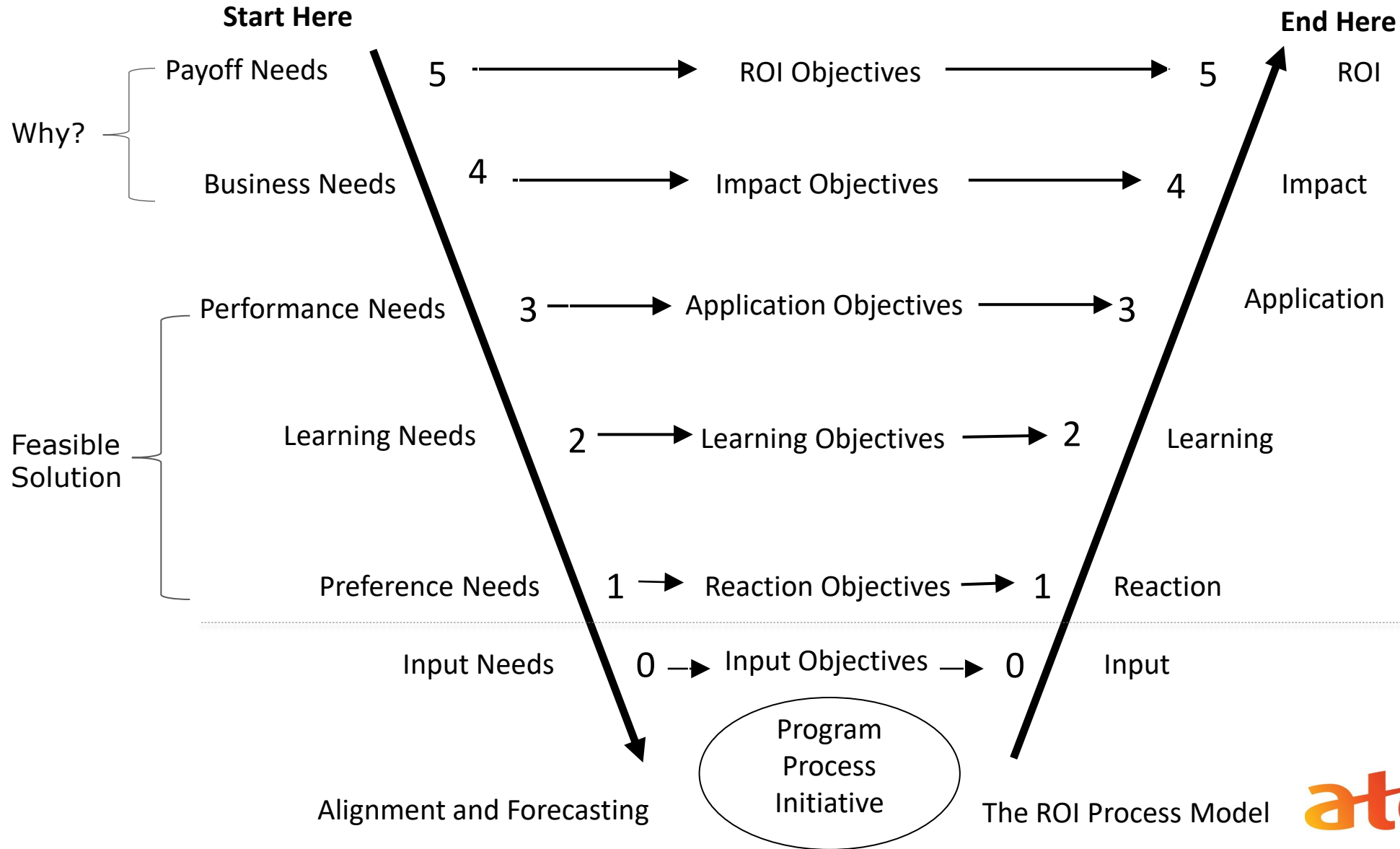
Alignment Model



Alignment Model

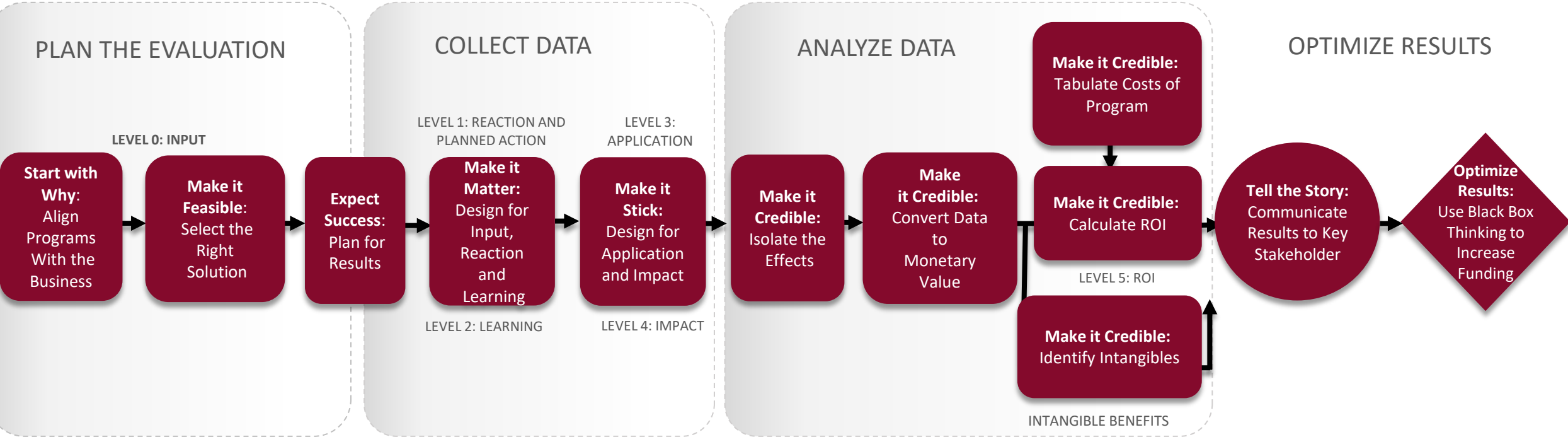


Alignment Model



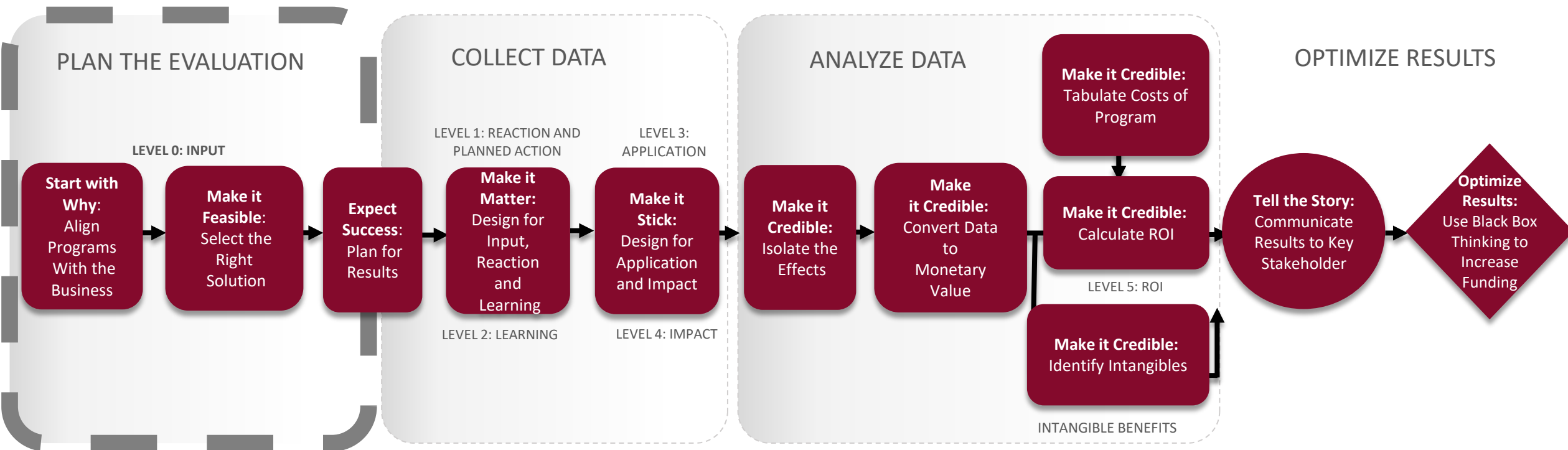
The ROI Methodology Process Model

Designing for the Delivery of Business Results



The ROI Methodology Process Model

Designing for the Delivery of Business Results

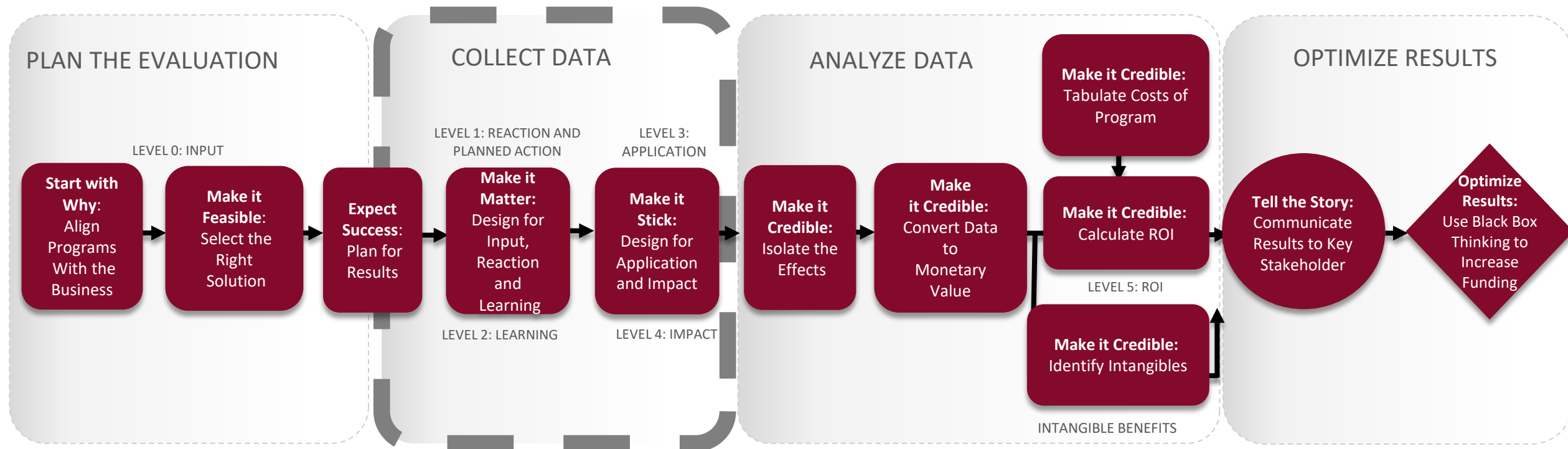


Developing Objectives for Each Level

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

The ROI Methodology Process Model

Designing for the Delivery of Business Results



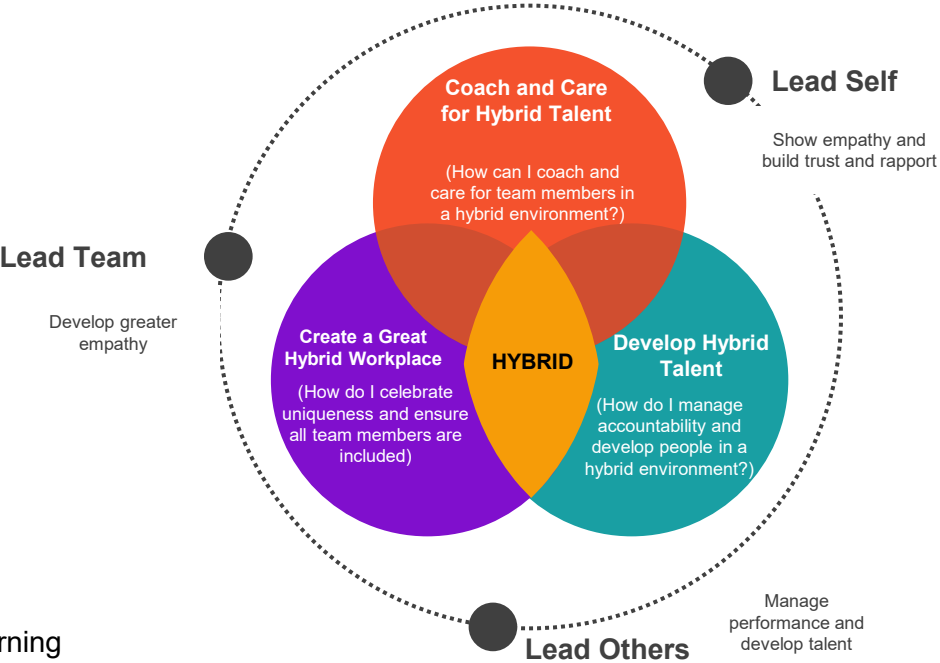
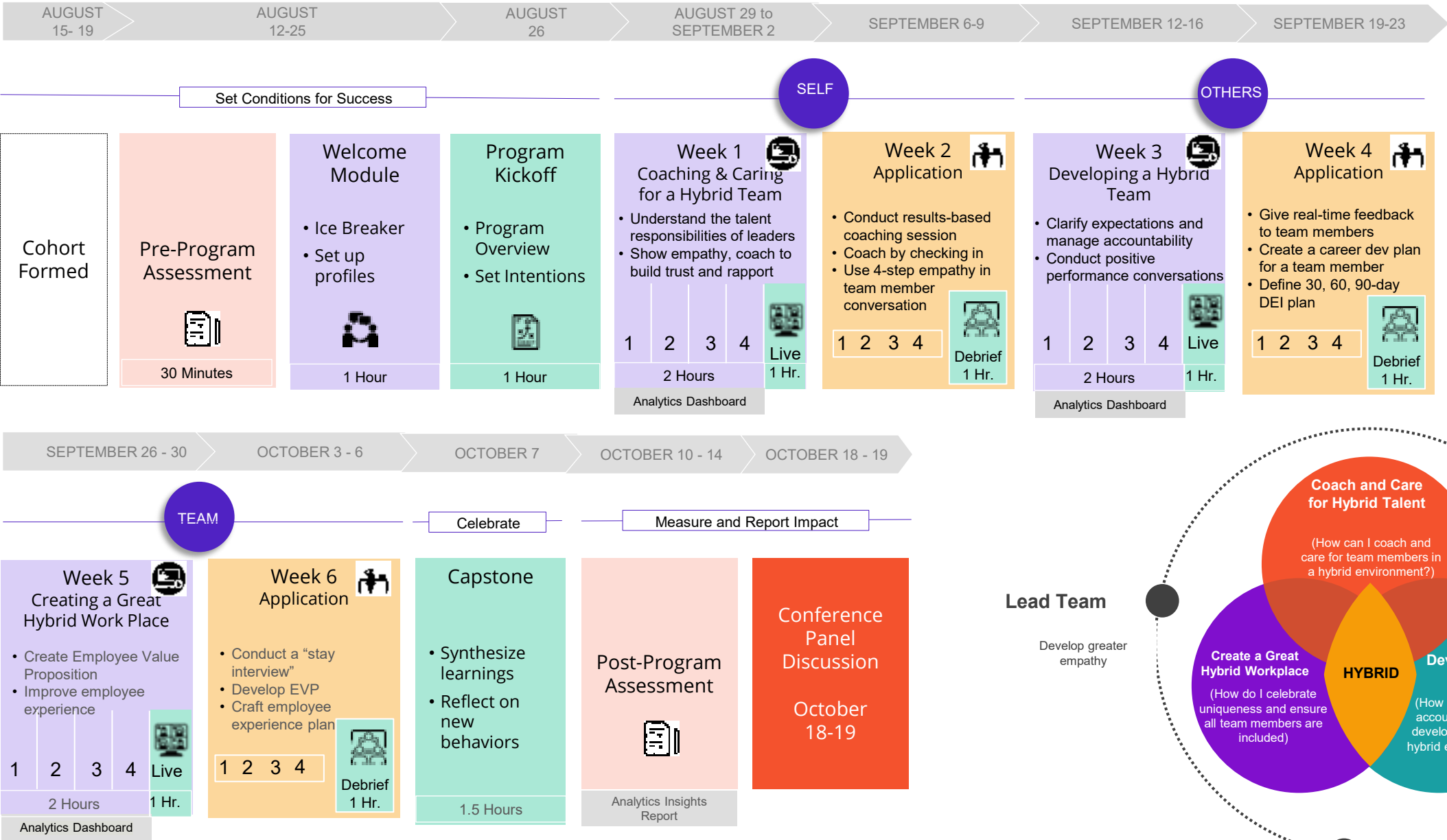
Design for Application and Impact

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

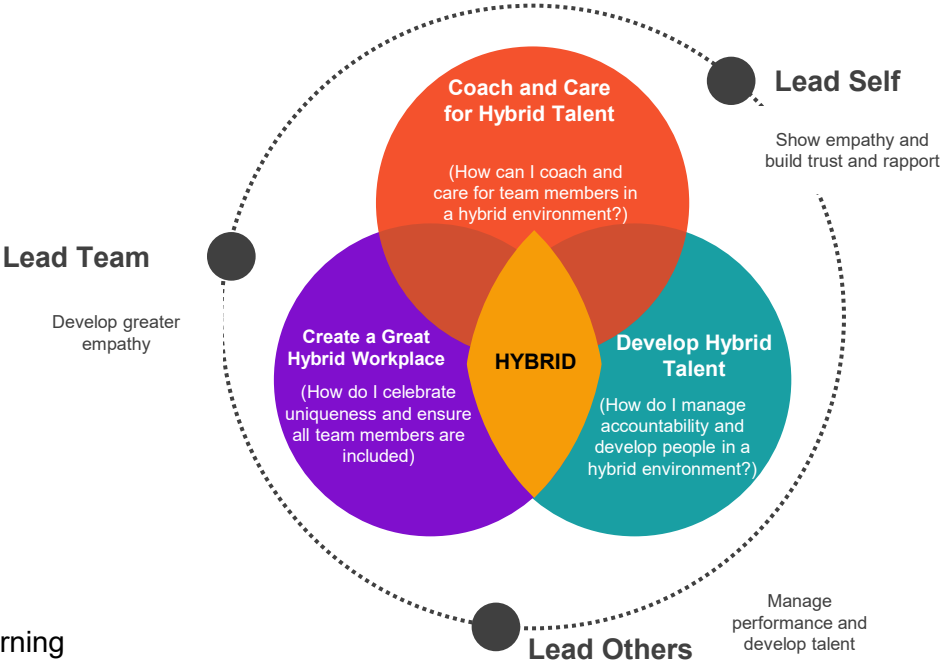
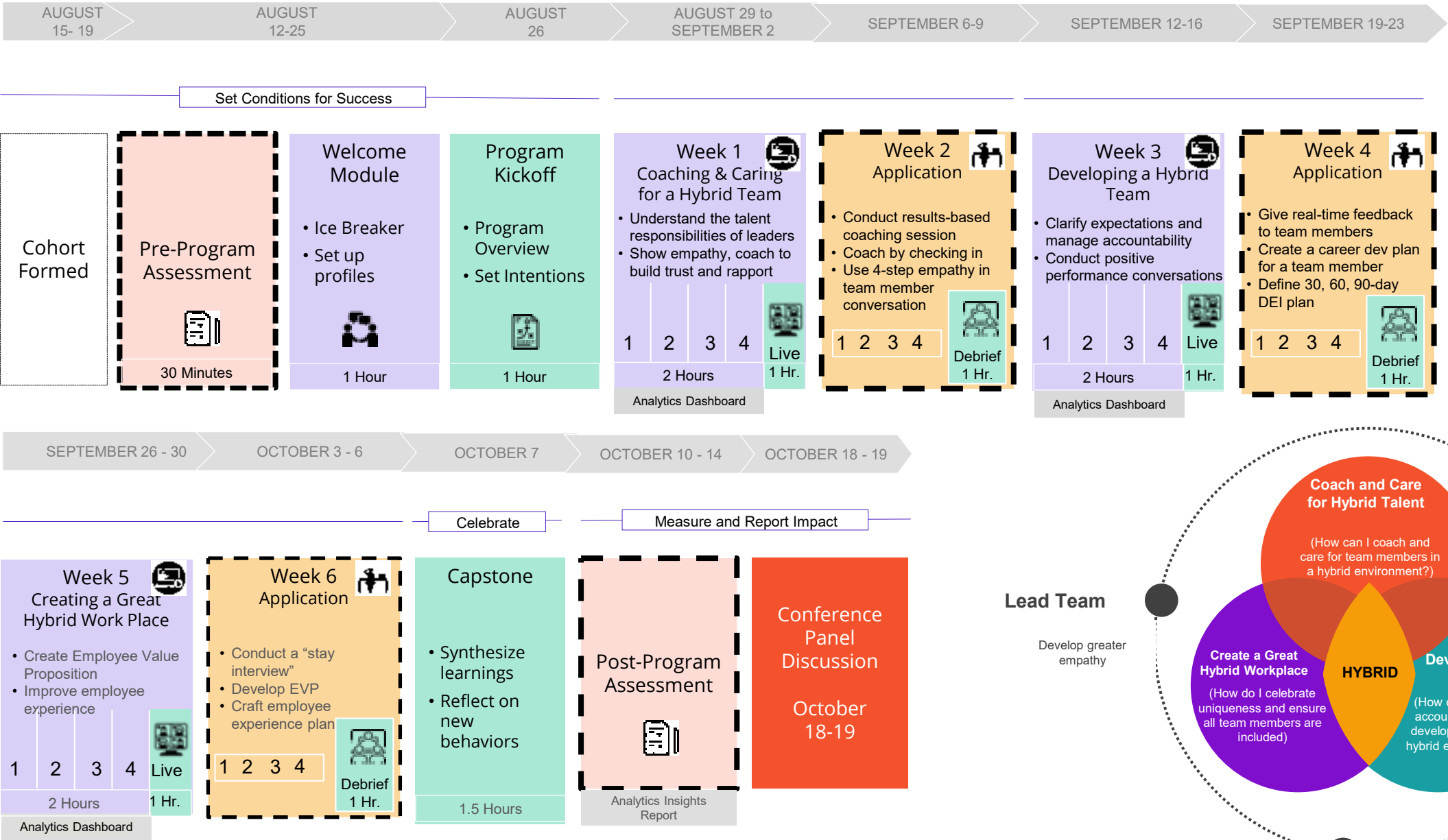
**Replace role players with whomever is most influential for your program.*

Leading in a Hybrid Work Environment: Program at A Glance

Assessment Virtual Synchronous Virtual Asynchronous On-the-Job Application

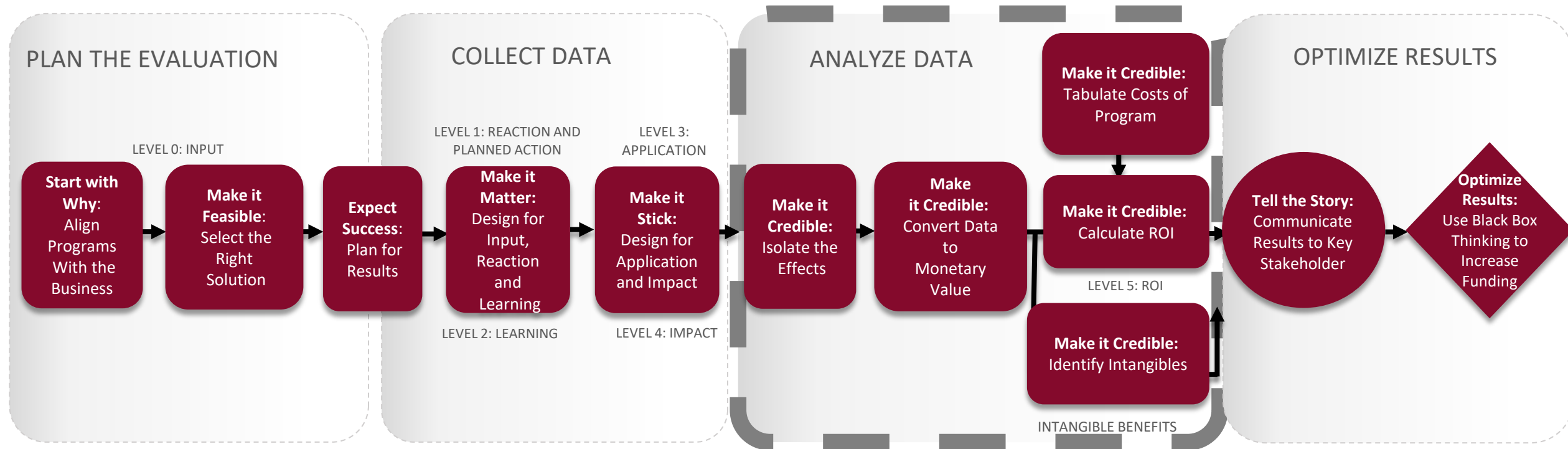


Leading in a Hybrid Work Environment: Program at A Glance



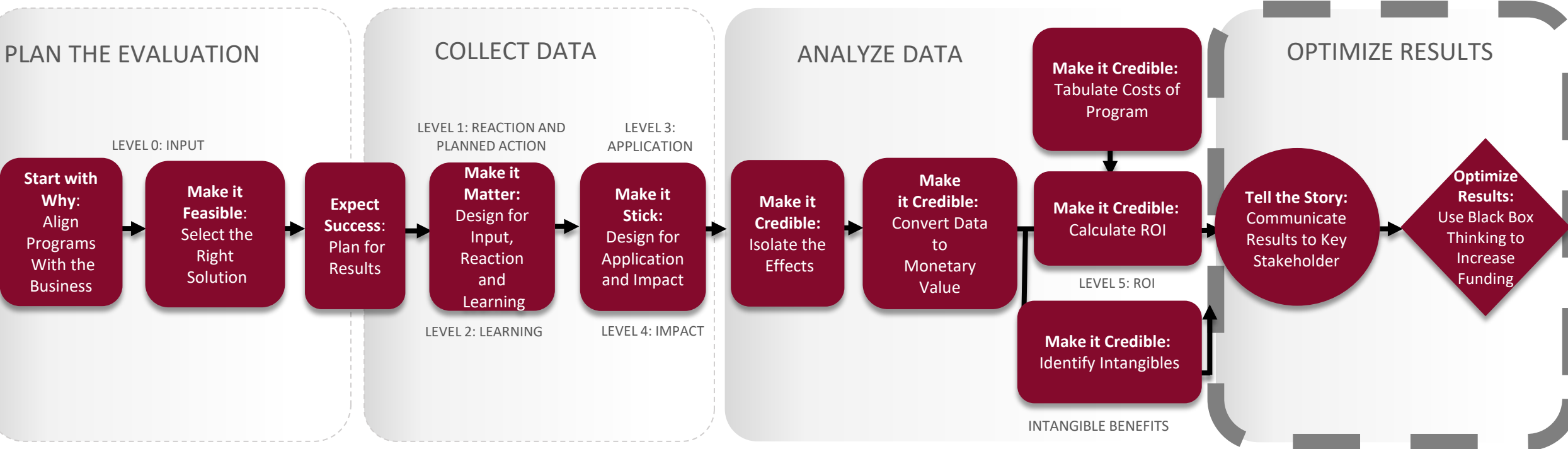
The ROI Methodology Process Model

Designing for the Delivery of Business Results



The ROI Methodology Process Model

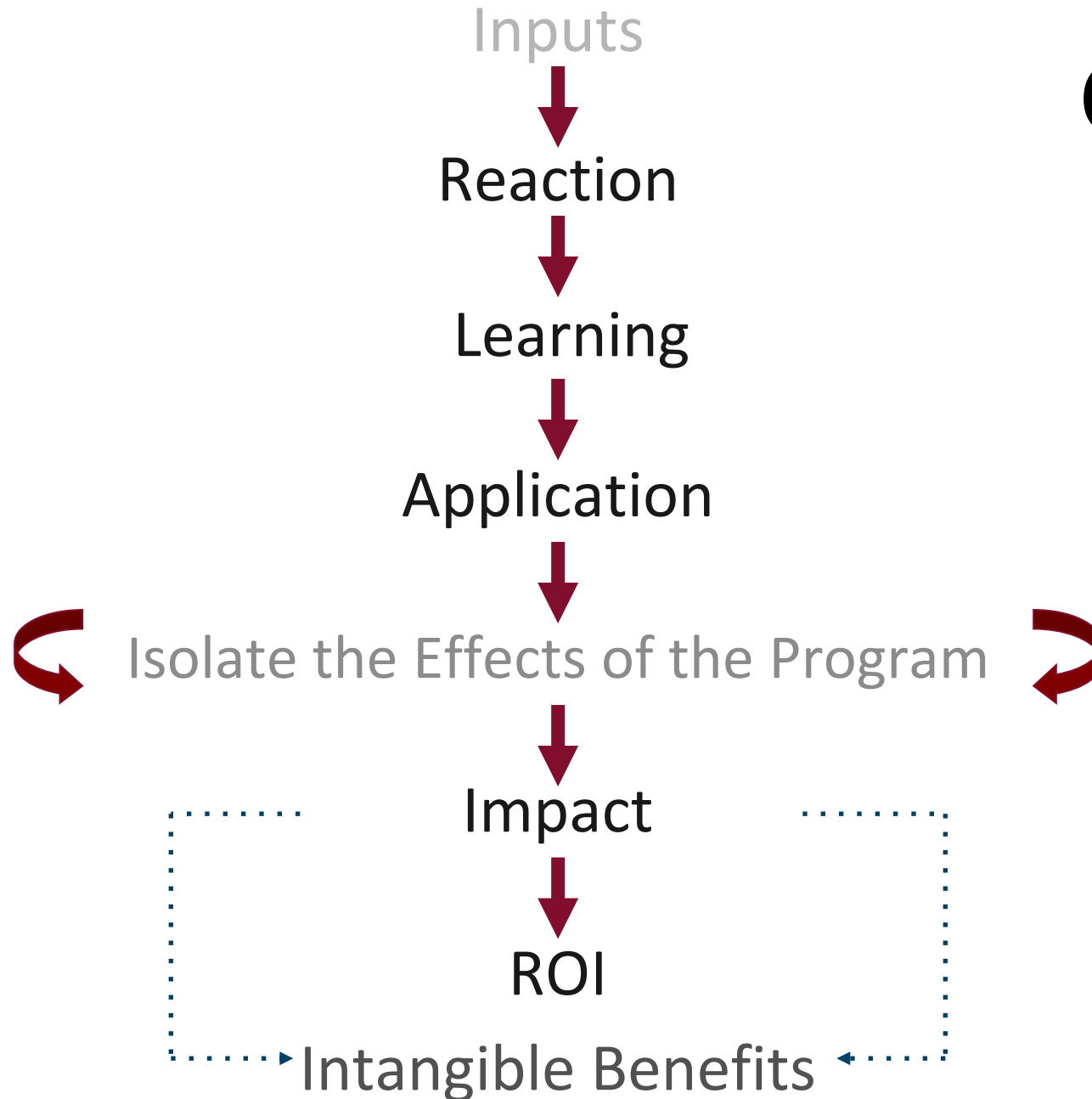
Designing for the Delivery of Business Results



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



Characteristics of Investments Suitable for Impact & ROI

Linkage of project to operational goals and issues

Importance of project to strategic objectives

Top administrator/executive interest in the evaluation

Cost of the project

Visibility of the project

Size of target audience

Investment of time required

*Benchmarking Percentages

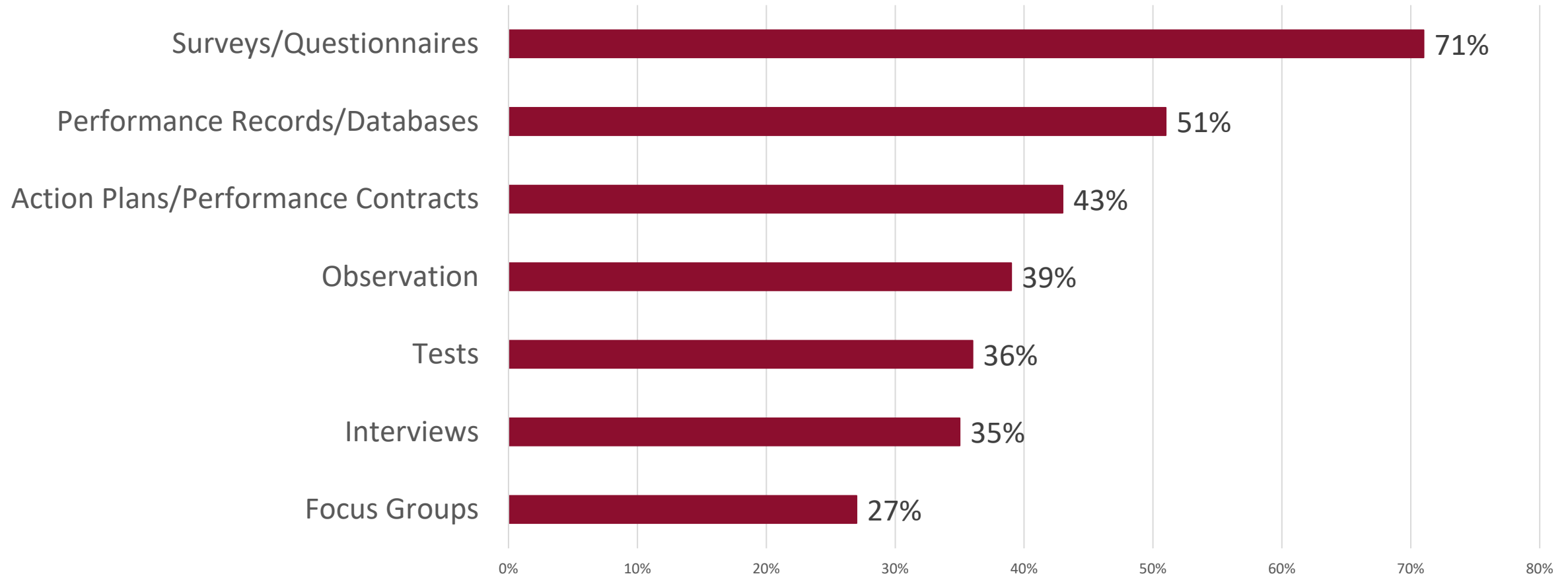
Measurement Targets

Level		Recommended % of Programs	**Benchmarking %
0	Input	100%	100%
1	Reaction	100%	80%
2	Learning	80-90%	70%
3	Application	30%	49%
4	Impact	10%	37%
5	ROI	5%	18%

*Percentage of programs evaluated at each level per year

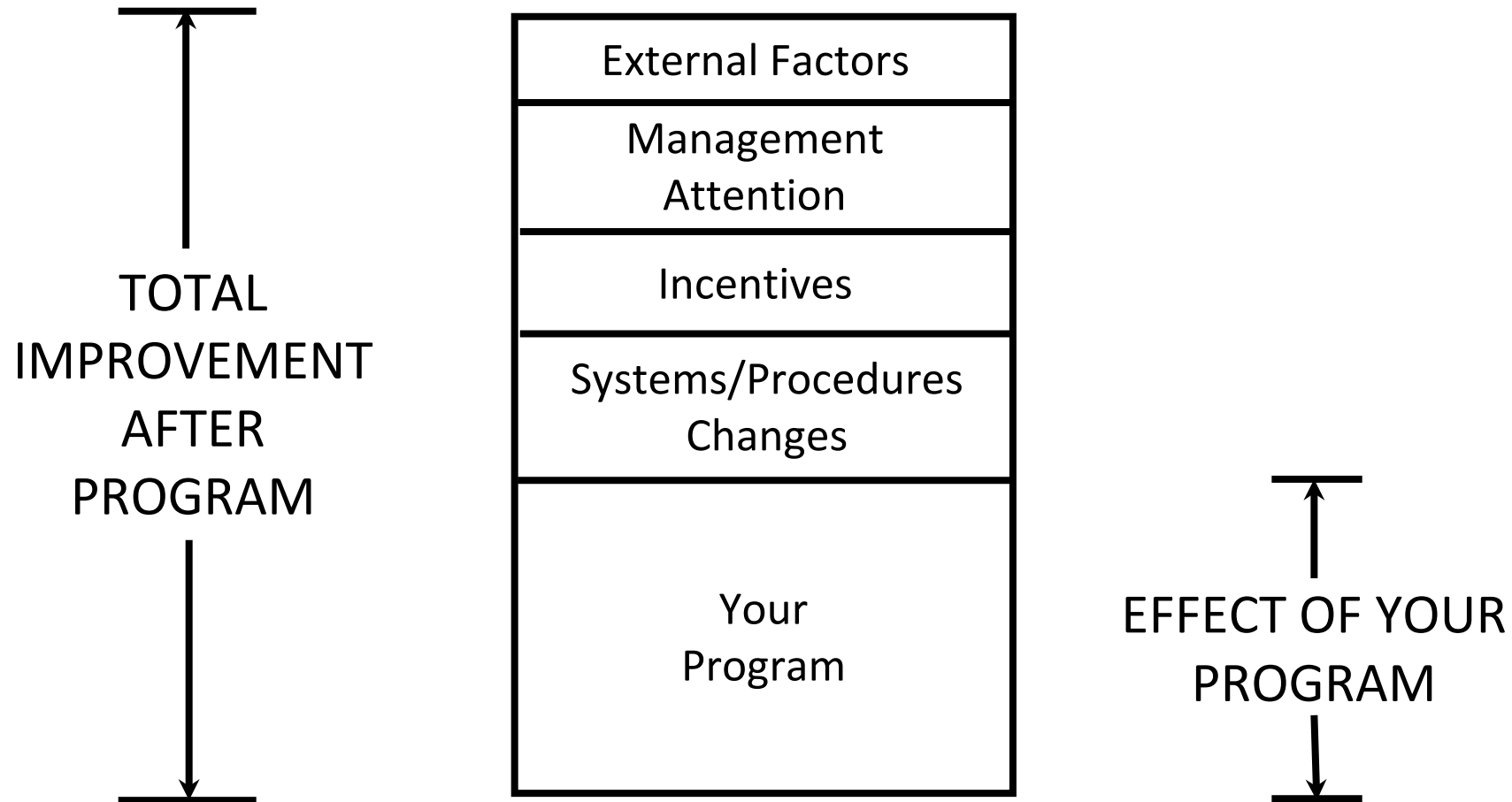
**Benchmarking 2020

Data Collection Methods

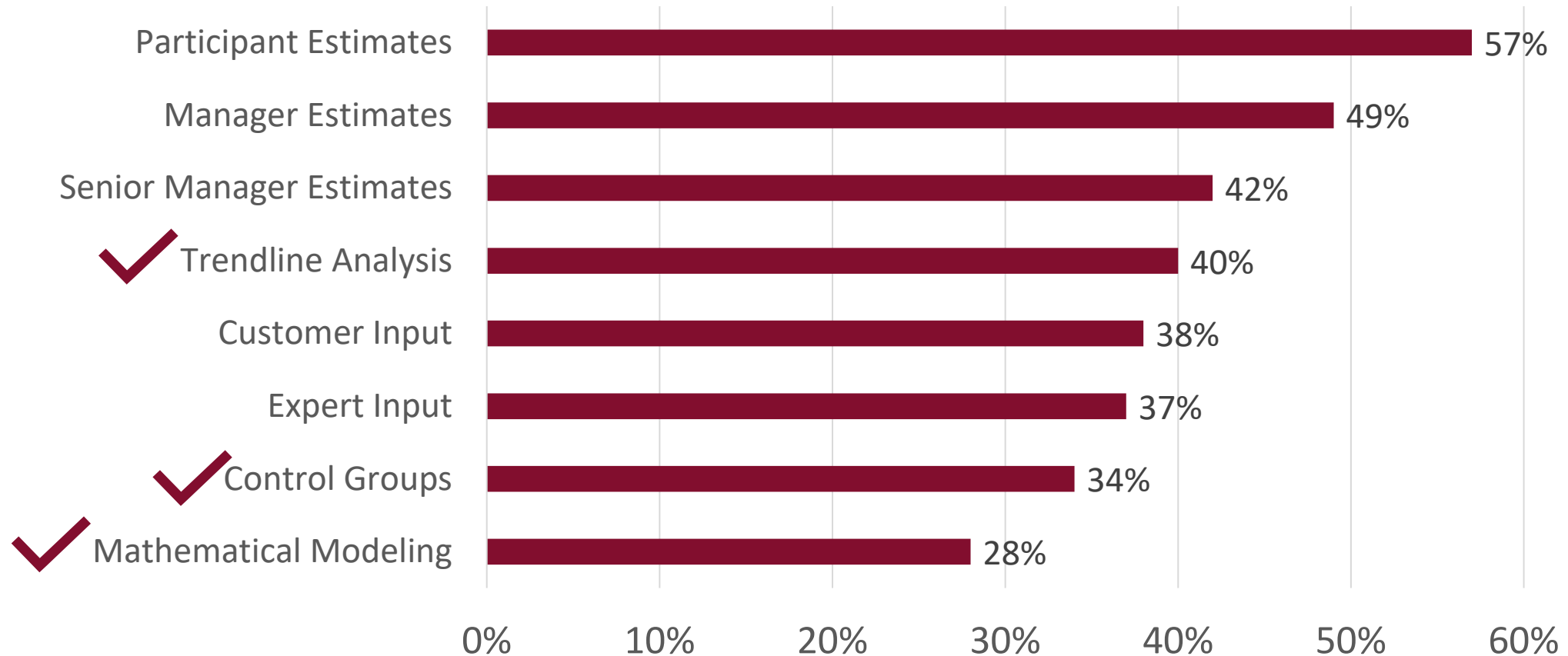


*Survey of Users, N = 246

Accounting for Other Factors

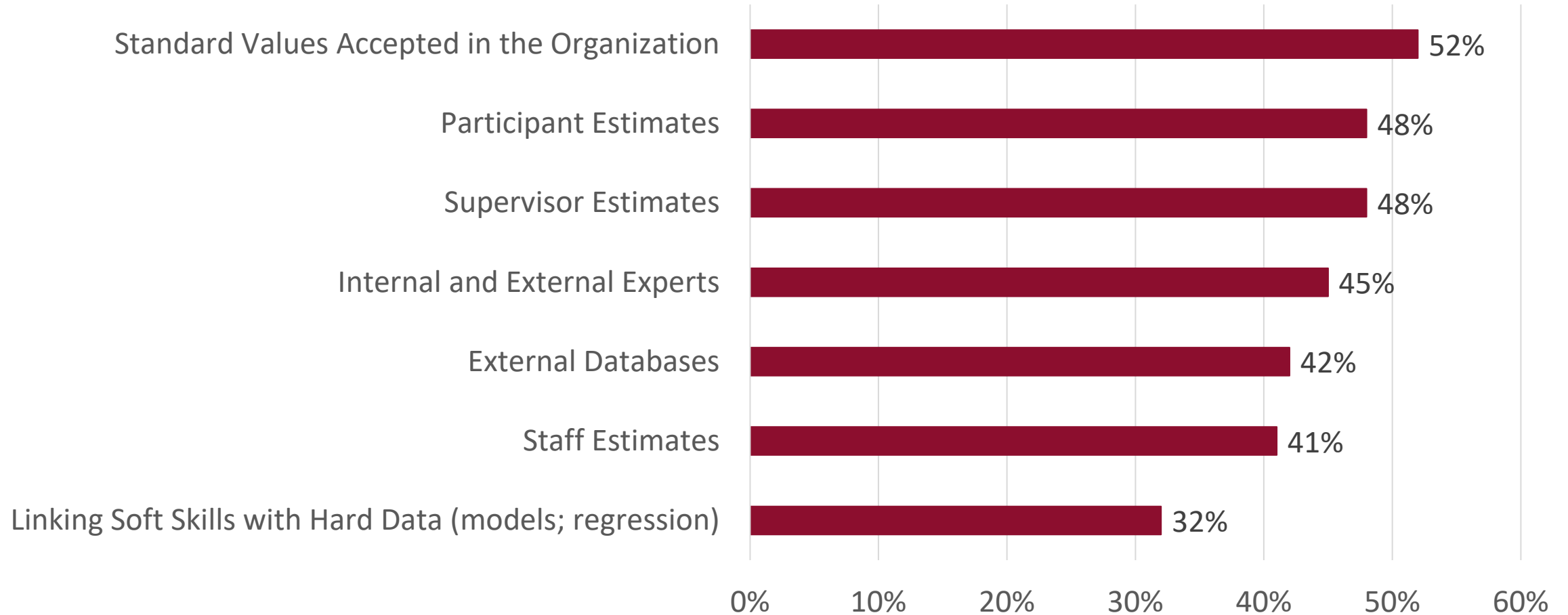


Isolation Methods



*Survey of Users, N = 246

Data Conversion Methods



*Survey of Users, N = 246

Intangibles



- Adaptability
- Awards
- Brand awareness
- Career minded
- Caring
- Collaboration
- Communication
- Conflicts
- Corporate social responsibility
- Decisiveness
- Engagement
- Image
- Innovation
- Job satisfaction
- Leadership
- Networking
- Organizational climate
- Organizational commitment
- Reputation
- Stress
- Talent
- Teamwork

Fully-Loaded Costs

“When in doubt, put it in.”

The process should withstand even the closest scrutiny in terms of its credibility.

DIRECT

- ☐ Program Materials
- ☐ Instructor / facilitator
- ☐ Facilities
- ☐ Travel, lodging, meals

INDIRECT

- ☐ Needs Assessment (Prorated)
- ☐ Program Development (Prorated)
- ☐ Participant Time (salaries & benefits)
- ☐ Administrative/overhead
- ☐ Evaluation



What is ROI?

Mobile Learning for Sales Team

Benefits: \$228,000

Costs: \$55,449

$$\text{BCR} = \frac{\$228,000}{\$55,449}$$

$$\text{ROI} = \frac{\$228,000 - \$55,449}{\$55,449} \times 100$$

What is ROI?

Mobile Learning for Sales Team

Benefits: \$228,000

Costs: \$55,449

$$\text{BCR} = \frac{\$228,000}{\$55,449} = 4.11$$

$$\text{ROI} = \frac{\$228,000 - \$55,449}{\$55,449} \times 100 = 311\%$$

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”.



GREATER BOSTON CHAPTER
Association for
Talent Development

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.

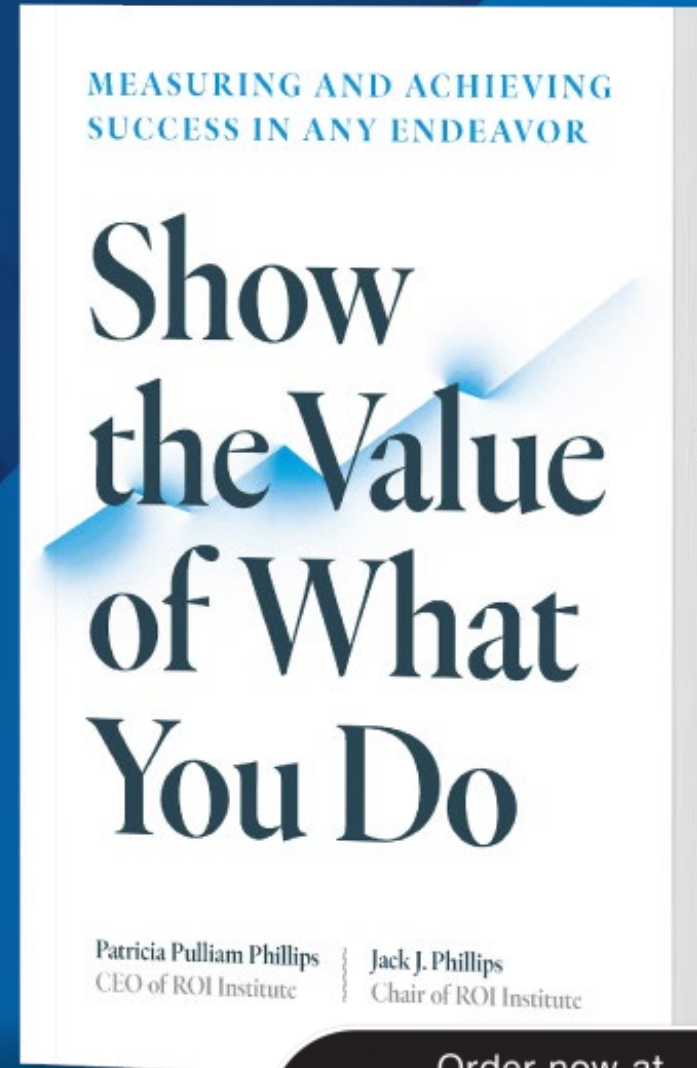


Learn how to start your project,
set precise objectives, collect
all types of data, convert data
to money, and calculate ROI.

Order Your Copy Today!



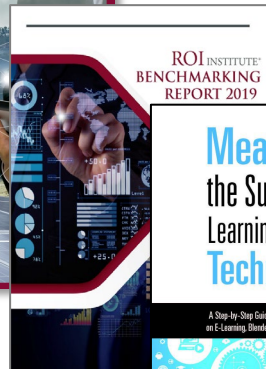
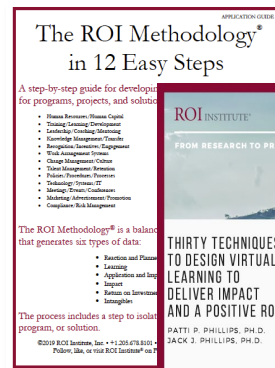
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