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SAN DIEGO
MAY 21-24

Show the Value of What You Do: Measuring and Achieving Success in Any Endeavor

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

CONTACT: patti@roiinstitute.net

Objectives

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

- Clarify why the work you do matters.
- Define success with measures that matter, including ROI.
- Create greater value by using what you learn through your measurement process.

Global Communications

CEO: Sydney Mitchell
President of GlobalCom University: Donald Hodges

Sydney has been CEO for nine months. She has a reputation for begin aggressive about meeting goals, yet she is pragmatic and fair. She is interested in profits, productivity, customer satisfaction, and positioning the company as being a Great Place to Work.

In a recent meeting with Donald, she asked him a simple question:

What results are we seeing from our investment in GlobalCom University?

Donald's Response

In the past nine months we have:

- ✓ Developed **10** new programs
- ✓ Offered **1,724** hours of training
- ✓ Trained **3,680** employees
- ✓ Received **4.5** out of **5** on overall program satisfaction.
- ✓ And we have **10** more new programs under development.

From Donald's Perspective

Is Donald reporting results?

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From Sydney's Perspective

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Five-Level 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 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

What is ROI?

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

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

What is ROI?

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

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

What is ROI?

$$BCR = \frac{\$750{,}000}{\$425{,}000} = 1.76:1$$

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

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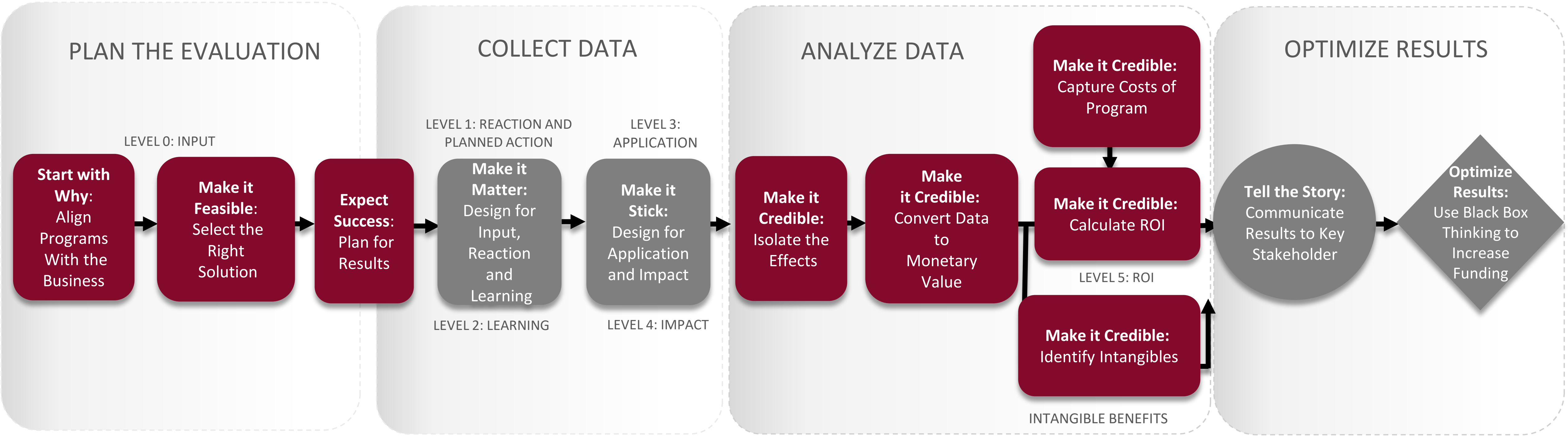
The ROI Methodology Process Model

Designing for the Delivery of Business Results



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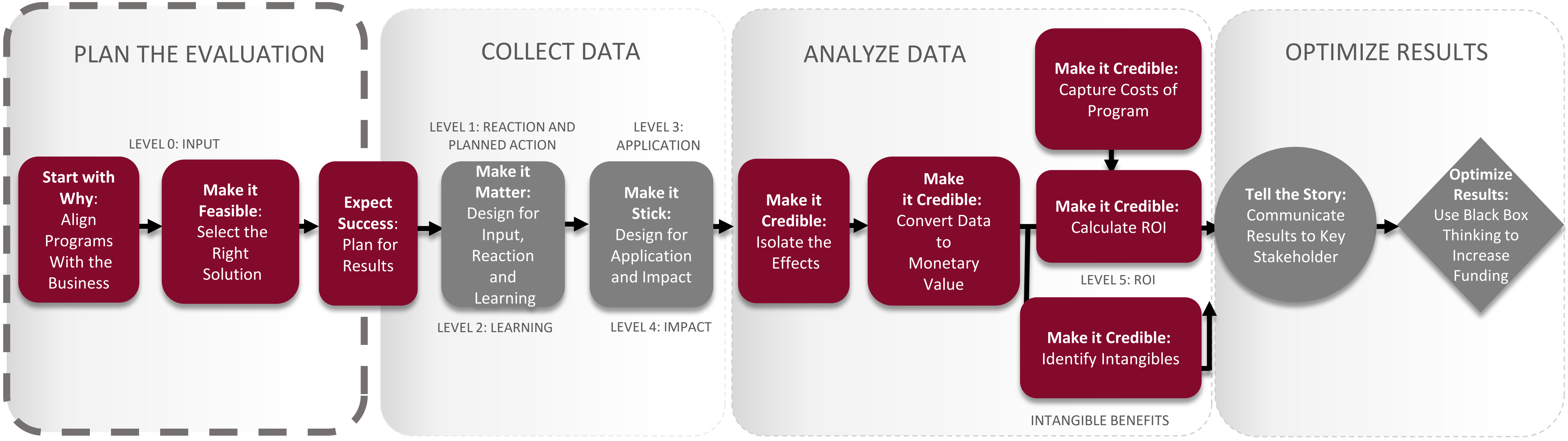

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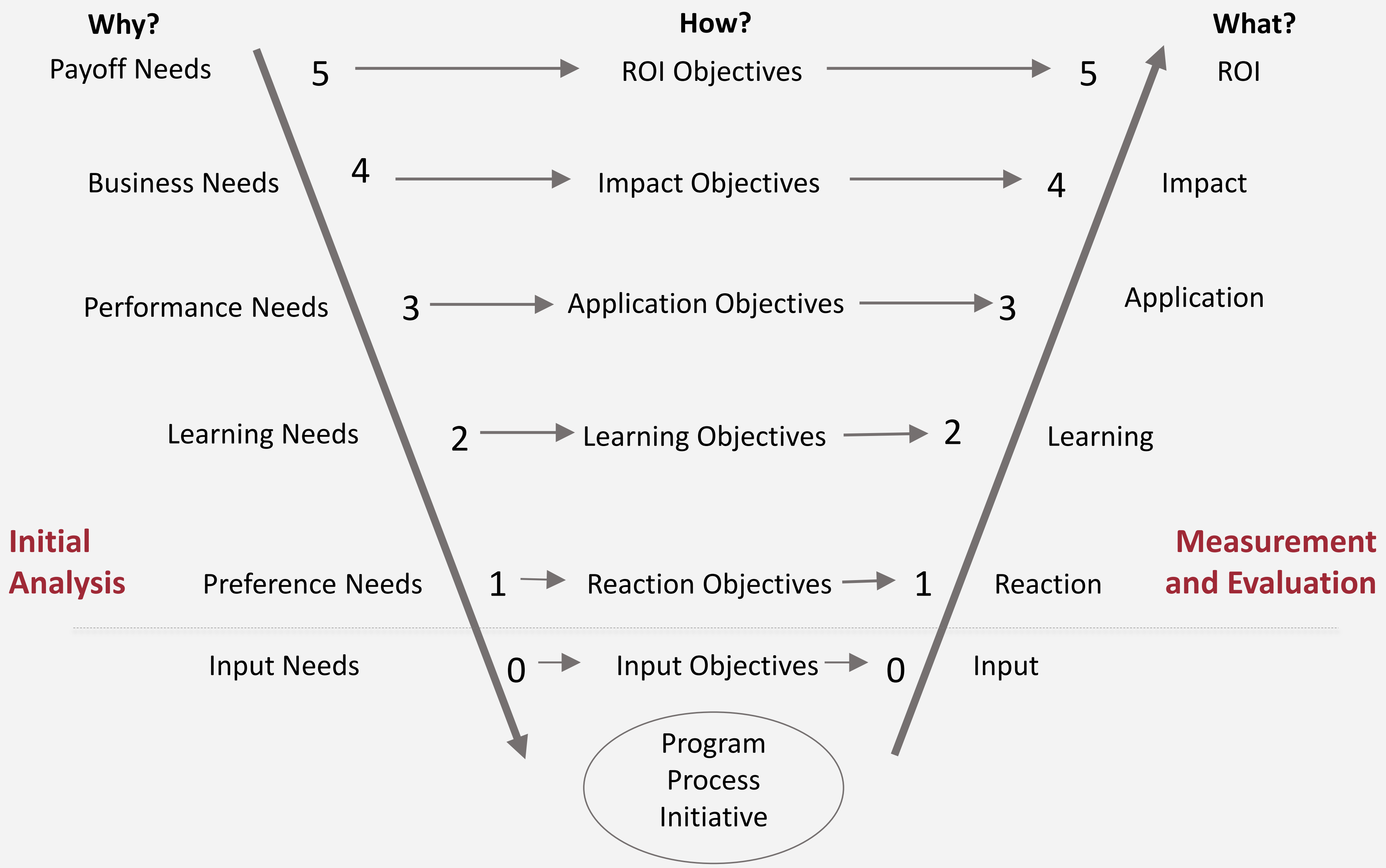
Alignment Model



Do you know your levels of evaluation?

Match each objective on the following slide with a level of evaluation.

In-person audience, you will be graded based on the **accuracy** of your response, the **speed** with which you respond, and the level of **enthusiasm** with which you respond.

Virtual audience, you will be graded based on **accuracy** of your response and the **speed** with which you respond in the Chat!

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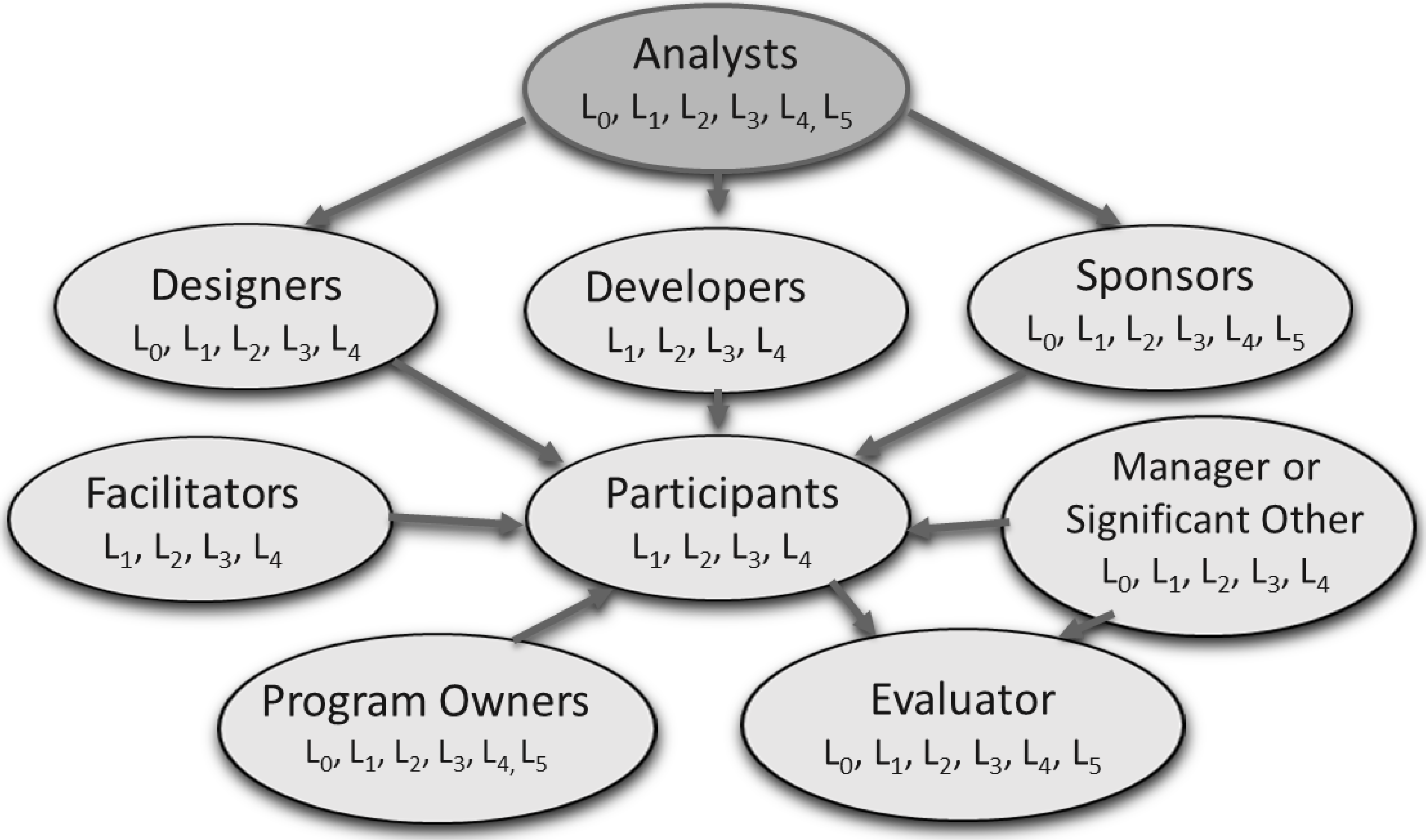
Matching Evaluation Levels with Objectives

After completing this program, participants should:

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

Objectives define value.



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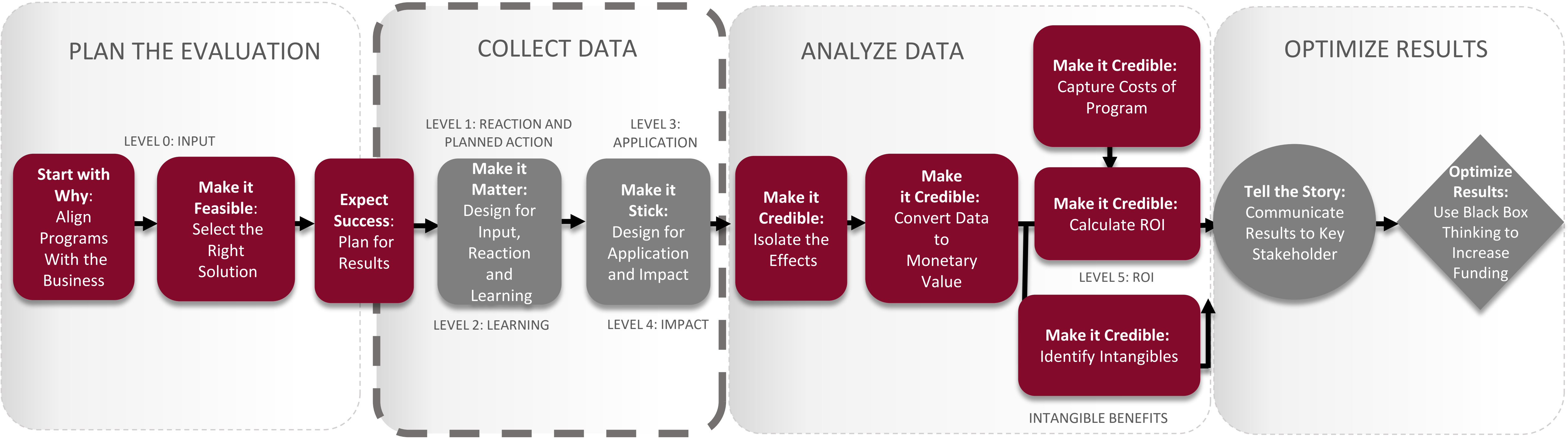

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Renew America Together: Civility Leadership Institute

Founder: General Wesley Clark
Executive Director: Mary-Lee Smith
Facilitator: Sharon Lovoy
Evaluation Team: ROI Institute

Sometimes a project requires data collection at multiple times for a long period of time. This can seem overwhelming. The key is to build it into the process.

Learn more at: https://www.renewamericatogether.org/cli/

Program Design

12-month open-enrollment program

- 12 months online
- Monthly skill-building (first six months)
- Special guest speakers (second six months)

Data Collection

- Application Process (Business Alignment)
- Polling and chat each month during skill building
- Questionnaire
  - Three months into program
  - Six-month skill building completion
  - 12-month end of program
- Interviews

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

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 — 2 Hours
Live — 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 — 2 Hours
Live — 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

Celebrate

Measure and Report Impact

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

1 2 3 4 — 2 Hours
Live — 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

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

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Download the report from: https://roiinstitute.net/report/

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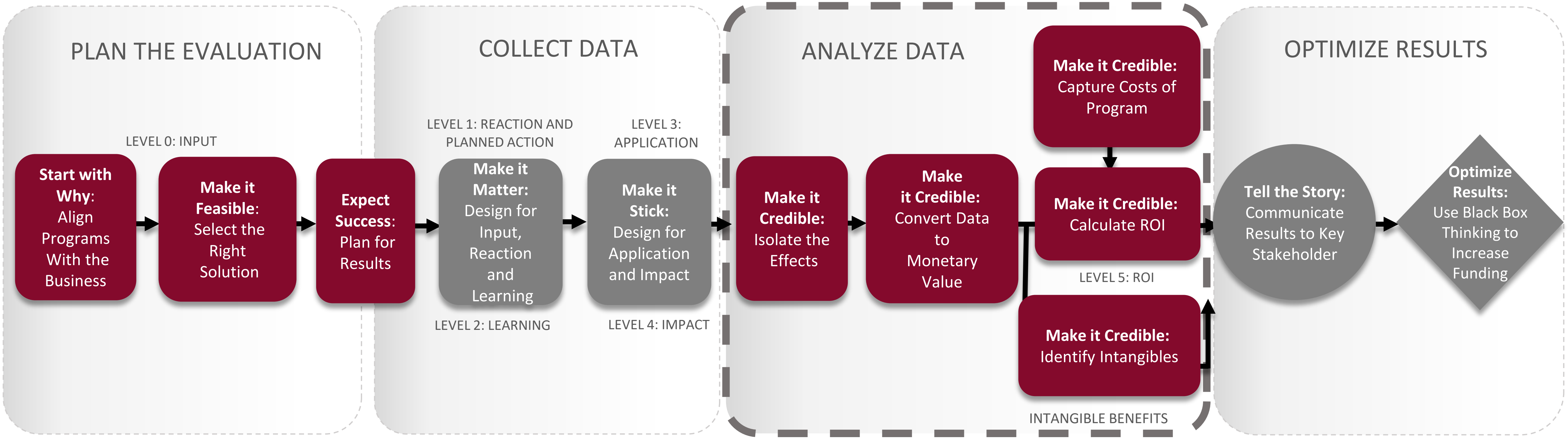

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The Value of Chaplaincy

*Skills required of a chaplain:

- Excellent listening, communication and interpersonal skills in order to build and develop relationships with the people you are helping.
- An understanding and willingness to engage with people of all cultures

*from prospects.ac.uk

Business Needs

- Length of stay (LOS) of patients in high-cost units such as the intensive care unit (ICU)
- Patient satisfaction including that of the patient's family members

Results

- Cost savings to hospital in one year of $251,640
- Ensured patient care
- Improved family care
- Secured future funding
- Cost of solution: $33,800
- ROI: **???**

Approach

Action 01

Aligned chaplaincy with the needs of the business.

Action 02

Positioned chaplaincy integration in the ICU for success by developing clear objectives

Action 03

Ensured buy-in and knowledge of process from ICU medical team, patient, and patient's family

Action 04

Collected data along the way. Compared LOS in ICU with chaplain integration to LOS in similar ICU settings without chaplain integration

Source: Doug Stewart, Chief Chaplain at Memorial Regional Health System in Belleville, Illinois. Featured in Phillips, P. P. and Phillips, J. J. (2023) Show the Value of What You Do. Oakland, CA: Berrett-Koehler Publishing.

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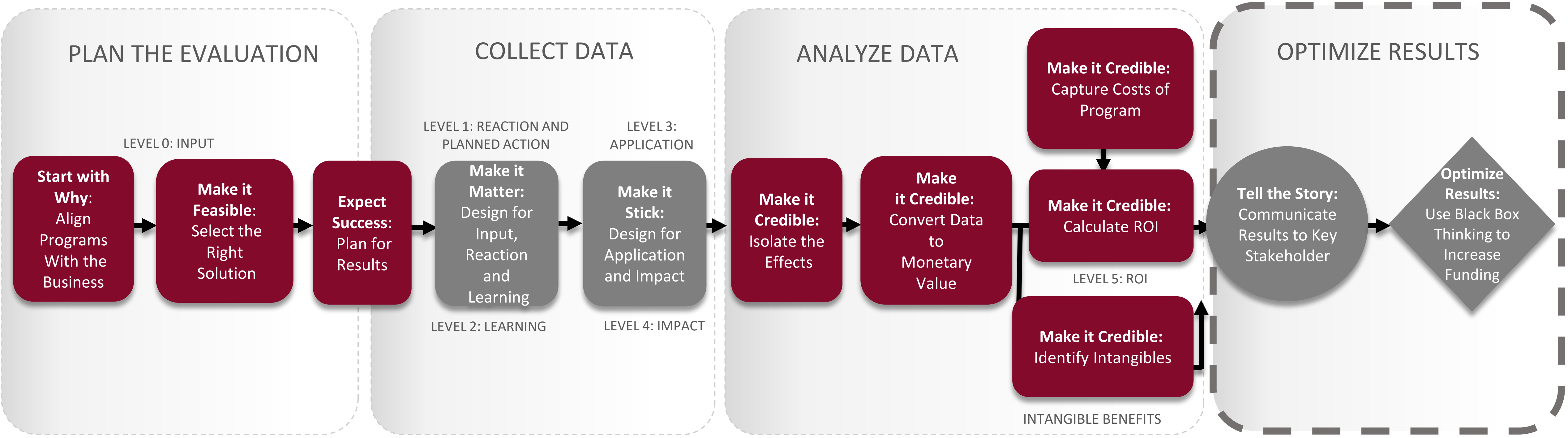

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If you want to show the value of what you do, keep in mind:

- ✓ Activity represents costs, costs get cut.
  Clarify why the work you do matters by focusing on results.
- ✓ Specificity drives results.
  Define success in specific, measurable terms that align with the needs and interests of all stakeholders.
- ✓ Negative ROIs can lead to positive outcomes.
  Use what you learn from the measurement process.

Remember, when it comes to showing value:

- 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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Please log into Mentimeter to Send In Your Questions

Patti Phillips - Show The Value of What You Do

https://www.menti.com/aljnieziw1km

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Resources

SCAN ME

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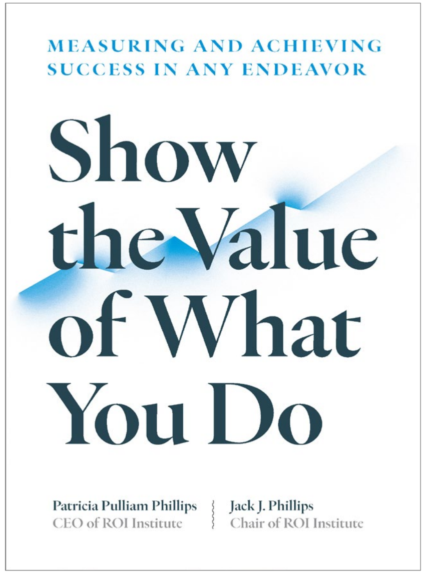

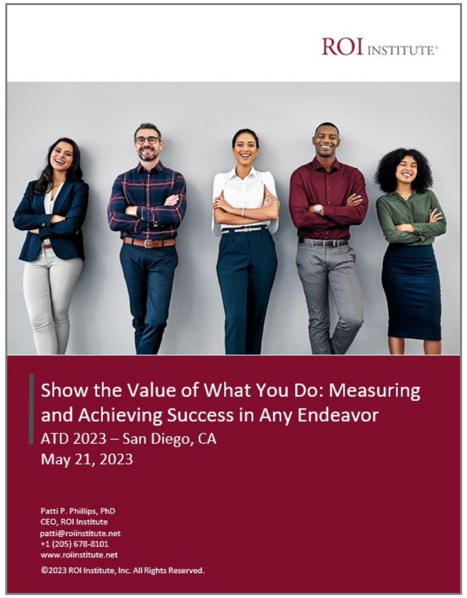

Questions?

patti@roiinstitute.net

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