

Certification Opportunities

Name	Organization	Amount	Notes
Vince Eugenio	Harbor Freight	Multiple People	Connected 4.21.23. Money has been put aside for ROI Institute for the August this Year. His words “it is not a matter of if, just when” Also connect Kylie for Consulting Work
Kalyn Wilson	Dream Forward Consulting		Meeting Friday 11am CST – BB – Verbal for Live Virtual Cert June 12 th (Emailed 4.27.2023 AV) Cannot confirm Verbal from Bryce. Responded to email: she cannot do it this year: trying to flip into on-demand or December certification.
Nickasia Baillie	Republic Bank Limited	Discussion	Learning and Research Analyst (Andy Reconnected: called on 4.27.2023. Out of budget, is talking to boss next week to find out what the budget is and reporting back to Andy.
Jason Taylor	Department of Defense	8 X \$2,995=\$23,960	Director 01.20.23 Completing another program now. Will touch base in Q2. (Reconnected 4.27.2023. Is now Learning Standards and Analytics Chief and has a team of 8. Very interested in ROI Certification for his team. Working on sending all 8 or doing a small internal. Sending information and setting up a longer meeting to discuss. AV)
Pilar Martin Garcia	South West Water	\$3,995	Spain, On Demand, Waste Water Programme Manager Checking with leadership will know next week Trying to flip to LV Showing out of office until Wed
Kathy Martin	Alkbermarie	\$3,700	From Boot Camp Trip to Budipest will get back to me once she gets back. ETA May 1

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Prentice Parrish	Cerebro Communications	\$3,995	Verbal for September Live Virtual.
Tiffany Carter	FAA	\$3,595	2024 working on location and dates Trying to get her in earlier
Amy Happ	Grant Thornton International	6 people for Boot Camp at \$297 per	Working on either 6 for Live Virtual boot camp or an internal boot camp for 2k. Select participants will go to Certification.
Barry Crosby	TSA	\$3,595 +	Section Chief, good meeting, wants to take ROI Certification is getting approval, checking back in two weeks. Also wants to offer it to his department. Is interested in measuring Virtual Programs. Possible Internal Certification as well.
Gagan Narang	Capital One	\$3,995	Sent all in person dates as well as LV. Waiting to hear back

Summary

Interested: 21, \$168K

Pending: 1 2k

Verbal: 1, \$3,595

Won: 18 74.8K

Need to Place

1. Nellie Crawford PD
2. Maria Wiltse \$1,500
3. Christina Olson (carry over)PD

Certifications 2023

May						
S	M	T	W	T	F	S
	1	2	3	4	5	6
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21	22	23	24	25	26	27
28	29	30	31			

June						
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August						
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September						
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29	30	31				

November						
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December						
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31						

Certifications 2024

January							February							March							April						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6					1	2	3						1	2		1	2	3	4	5	6
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14	15	16	17	18	19	20	11	12	13	14	15	16	17	10	11	12	13	14	15	16	14	15	16	17	18	19	20
21	22	23	24	25	26	27	18	19	20	21	22	23	24	17	18	19	20	21	22	23	21	22	23	24	25	26	27
28	29	30	31				25	26	27	28	29			24	25	26	27	28	29	30	28	29	30				
May							June							July							August						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4							1		1	2	3	4	5	6					1	2	3
5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
26	27	28	29	30	31		23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	31
							30																				
September							October							November							December						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7			1	2	3	4	5						1	2	1	2	3	4	5	6	7
8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
29	30						27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

ROI Certifications 2023

Date	Type and Discription	Attendees	Notes
June 12, 2023	Live Virtual	1. Kelli Fasching, 3,995, US HR PMO, ASML 2. Cheryl Seminara \$2,500 Chief Strategist and Coach, The Learning Concierge (transfer from On-Demand) 3. Rashmi Sathyanarayana \$2,995 4. Larkin Jennings, \$3,995 Supervisory Evaluator, Office of Inspector Gen US. 5. Jason Langston, \$3,995 BPA Training Program Manager, Insperity 6. Laurie Horvath, \$2,995 BCBSNC 7. Ramon L. Martinez, \$3,595 Management Analyst, US Army Medical Center 8. Chris King, \$2,500 Learning and Organizational Development Manager, Kirkwood Community College. 9. Debbie Becker Free, FM Global, Learning Experience Facilitator. 10. Jovana Vega, \$3,995 Barry University, Professor 11. Kim Waters \$200 Humana Business Intelligence Lead. 12. Abigail Ross, 3995, Business Analyst, HigherEchelon	Total Registrations: 12 Revenue: \$37,555 Target Revenue: \$50,000 Difference: -\$12,445 AVG Per Participant: \$3,129.58 Pre work sent
July 31-August 4, 2023	Boston, MA Host: FM Global Facilitator:	1. Eric Fendler, LSAC, SR. Manager \$3,595 2. Alan Zwerin, LSAC, Director of Accounting \$3,196 3. Leena Merdad, Board of Directos Consultant, EKTEFAA (Harvard) \$3,595 4. Patricia	Total Registrations: 6 Total Revenue: \$10,786 Target Revenue: \$50,000 Difference: \$39,214 AVG per person: \$2,157.2 Host: Patricia Larkin 1 st meeting 05.03.2023 Agreement Sent
August 28-September 1, 2023	Huntsville, AL Host: AMIIC Lana Barshinger Facilitator: Jack	1. David Mayo PNC purchased last year (sent email with new dates) out of office until June 1st 2. AMIIC 3. AMIIC	Total Revenue: \$3,995 Target Revenue: \$50,000 AVG per person: \$3,995 Host Meeting setup for 5.15.2023 Starting Marketing in June AMIIC

ROI Certifications 2023

Event Date	Type and Discription	Attendees	Notes
September 18, 2023	Live Virtual	1. Sheila Harrell, \$2,995 BCBSNC 2. Leigh Tingle: \$3,995 Manager, Instructional Design, DEXCOM	Total Registrations: 2 Revenue: \$6,990 Target Revenue: \$50,000 AVG Per Participant: \$3,495
September 18, 2023	New Orleans Host: Kelli Zohar Davis MCCNO (not confirmed) Facilitator:		Total Registrations: 0 Revenue: 0 Target Revenue: \$50,000 AVG Per Participant: 0
October ?	Atlanta Host: Facilitator:		Registrations: 0 Total Revenue: \$0 Target Revenue: \$50,000 AVG per person: \$0
November 6-10, 2023	Memphis, TN Host: St. Jude	1. Ranae Daniel, St Jude, Sr. Industrial Organizational Psychologist (\$2,500) 2. Austin Springer, St Jude 3. One More St. Jude	Registrations: 1 Total Revenue: \$2,500 Target Revenue: \$50,000 AVG per person: \$2,500 Host: Elizabeth Bishop 2 nd meeting 6/1 Promoted Internally Promoting to Caner Center Erin New SVP will see if they are attending
December 4, 2023	Live Virtual		Total Registrations: 0 Revenue: 0 Target Revenue: \$50,000 AVG Per Participant: 0

ROI Certifications 2024

Event Date	Type and Discription	Attendees	Notes
January	West Cost		
Feb	Orlando		
March			
April	Atlanta		
May	New Orleans		
June	Washington DC Area		
July	Denver		
August	New York/Boston/Wisconsin		
September	Seattle		
October	Charlotte		
November	Memphis		
December			

On-Demand Certification/Boot Camps

Event Date	Event	Type	Attendees/Data	Notes
NA	On-demand Virtual ROI Certification	Virtual	Registrations: 3	Hannah Castrogiovanni (\$3,995) Stacey Lamb, Director of Technical Training, Consumers Energy (\$3,995) Lisa Shinholster, Owner, DiscoverU (\$3400)
NA	On-Demand ROI Boot Camp	Virtual	Registrations: 21	Tina Sikora (Cap Group) 16 from NOVARTIS Anna Hemsworth (Benjaminmoore) Linda Moeller (Degreed) Abbra Nielson Riot Games Sr. Manager, Knowledge Management Tiffany L Carter FAA Training Specialist
09.27.2023	ROI Boot Camp	Live Virtual	Registrations: 2	Revenue: \$590 AVG Per Participant: \$295
11.08.2023	ROI Boot Camp	Live Virtual	Registrations: 0	Revenue: \$0 AVG Per Participant: \$0

Domestic Workshop Opportunities

Proposal Date	Name	Amount	Type of Event	Notes
	Vince Eugenio/Harbor Freight		Internal workshop	Updating Your Evaluation Strategy Session
	Ana Tavares VP and CFO Law School Admission Council	\$500	Live Virtual	Executive Briefing on ROI to 10 for Law School Admission Council creators of LSAT test. Wants to bring the culture of measurement and evaluation to LSAC. Will turn into a full workshop or internal certification. Proposal sent

Workshops Scheduled

Event Date	Name	Amount	Estimated Audience	Notes
07-24-26.23	ATD Core4	\$1,000	L&D	In person, Patti, Demonstrating the Impact and ROI of Learning and Talent Development
08.23.23	Cal State University	\$1,000	L&D	Virtual, Patti to deliver

Internal Certification Opportunities

Organization	Contact	Amount	Type of Event	Notes
Pasco County Schools	Michelle Kernan	\$30,000	In person	2022.09.23 Official SOW submitted to state for approval
NAVSUP/Navy	Brandon Ford			
ACMA/US Army	Martha Bowers	\$60,000		WON Setting Dates 40 participants 2 sessions Scheduling day and time
TSA	Barry Crosby	\$35,000	Unknown	First meeting, check back in a week.

Internal Certification Won/Schedule

Event Date	Name	Amount	Estimated Audience	Notes
06.20.23	ECTAC	\$36,000 (includes travel)		June 20-22 Three-day hybrid delivery
08.22-24.23	Fort Benning	12,500 budget		Hybrid approach. Jack to deliver. Sheila Smith/Rory O'Brien