

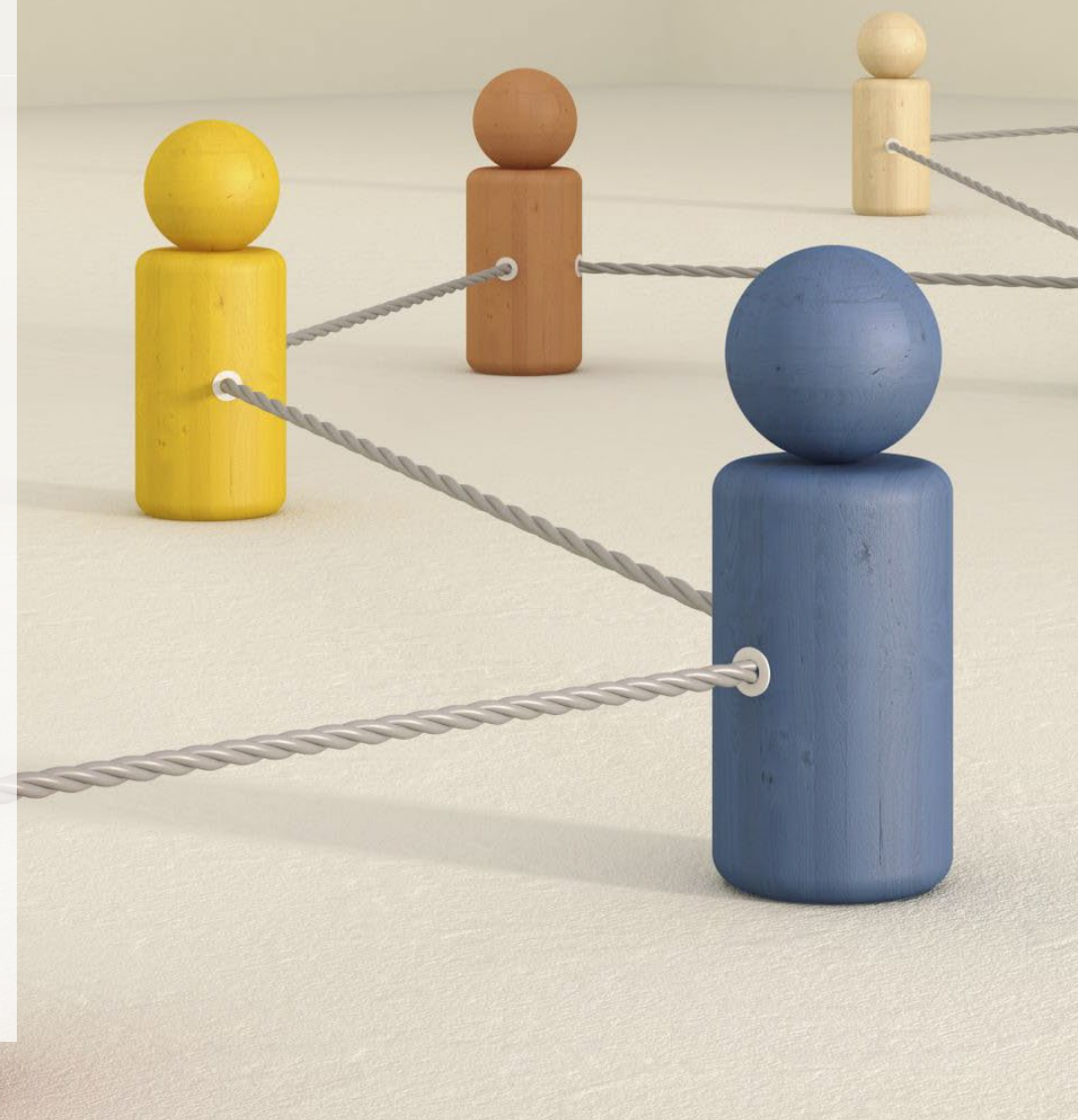
Demonstrating the Impact and ROI of Learning and Talent Development

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



Objectives

- Describe the framework used to demonstrate the value that matters, including ROI.
- Align programs with organization needs
- Plan data collection at Level 3 Application and Level 4 Impact for Principles of Supervision
- Plan data analysis for Principles of Supervision
- Identify how you can use what you learn during the session



Resources



<https://bit.ly/CSUROI>

ROI Institute Toolkit

The Alignment Conversation

Tools to help you align HR investments to business needs

The following tools provide a framework for the alignment conversation between client and the HR business partner.

The documents below provide questions you can use with clients to help ensure alignment between the ultimate payoff opportunities for the organization and a solution. It is a tool to support implementation of the left side of the alignment model (below). In this document, you will find:

1. A sample worksheet that you can use to take notes while having a conversation with clients. Once alignment is clear, set your objectives, position the program/project by designing, developing, and implementing it based on the objectives, and evaluate accordingly.
2. Sample worksheet completed after a conversation with a plant manager concerned that his team could not manage a meeting.
3. An "If-then" table, describing what you ask given what you know.
4. Sample business case for a solution after the alignment analysis. The sample demonstrates the flow of the logic, rather than the details of the case.
5. The "Great Idea" conversation. A conversation you can have when the client brings the solution to you.

The Alignment Process

Initial Analysis **Measurement and Evaluation**

Start Here End Here

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APPLICATION GUIDE

The ROI Methodology®

in 12 Easy Steps

A step-by-step guide for developing Impact and ROI studies for programs, projects, and solutions in the following areas:

- 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
- Organization Development/Consulting
- Project Management Solutions
- Quality/Six Sigma/Lean Engineering
- Communications/Public Relations
- Public Policy/Social Programs
- Creativity/Innovation
- Ethics/Integrity
- Safety/Health/Fitness Programs
- Environment/Sustainability
- Healthcare Initiatives
- Schools/Colleges/Universities
- Public Sector/Nonprofits
- Faith-Based Programs

The ROI Methodology® is a balanced approach to measurement that generates six types of data:

- Reaction and Planned Action
- Learning
- Application and Implementation
- Impact
- Return on Investment
- Intangibles

The process includes a step to isolate the effects of the project, program, or solution.

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Patricia Pulliam Phillips
Jack J. Phillips Gina Paone Cyndi Huff Gaudet

VALUE FOR MONEY

HOW TO SHOW THE VALUE FOR MONEY for All Types of Projects and Programs In:

- Governments
- Nongovernmental Organizations
- Nonprofits
- and Businesses

A Systematic Process to Measure Impact, Monetary Benefits, and ROI

With the Assistance of Kylie McLeod

Scrivener Publishing

WILEY

THE CONFERENCE BOARD

Effective Leadership in a Hybrid World of Work

udemy business rbl The RBL Group MICHIGAN ROSS SCHOOL OF BUSINESS ROI INSTITUTE®

CSU The California State University LEARNING AND DEVELOPMENT

Demonstrating the Impact and ROI of Learning and Talent Development

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

How many of you
attended the ROI
session last year?

- ▣ Yes
- ▣ No



Levels of Evaluation	Measurement Focus	Typical Measures
0. Inputs	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, Net Promoter Score
2. Learning	Measures changes in knowledge, skills, and attitudes	Skills, Knowledge, Capacity, Competencies, Confidence, Mindset, Contacts
3. Application & Implementation	Measures changes in behavior or actions	Extent of use, Task completion, Frequency of use, Actions completed, Behavior change, Success with use, Barriers to use, Enablers to use, Utility, Scrap
4. Impact	Measures changes in impact variables	Productivity, Revenue, Quality, Time, Efficiency, Customer Satisfaction, Patient Satisfaction, Employee Engagement, Talent Mobility, Innovation
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?

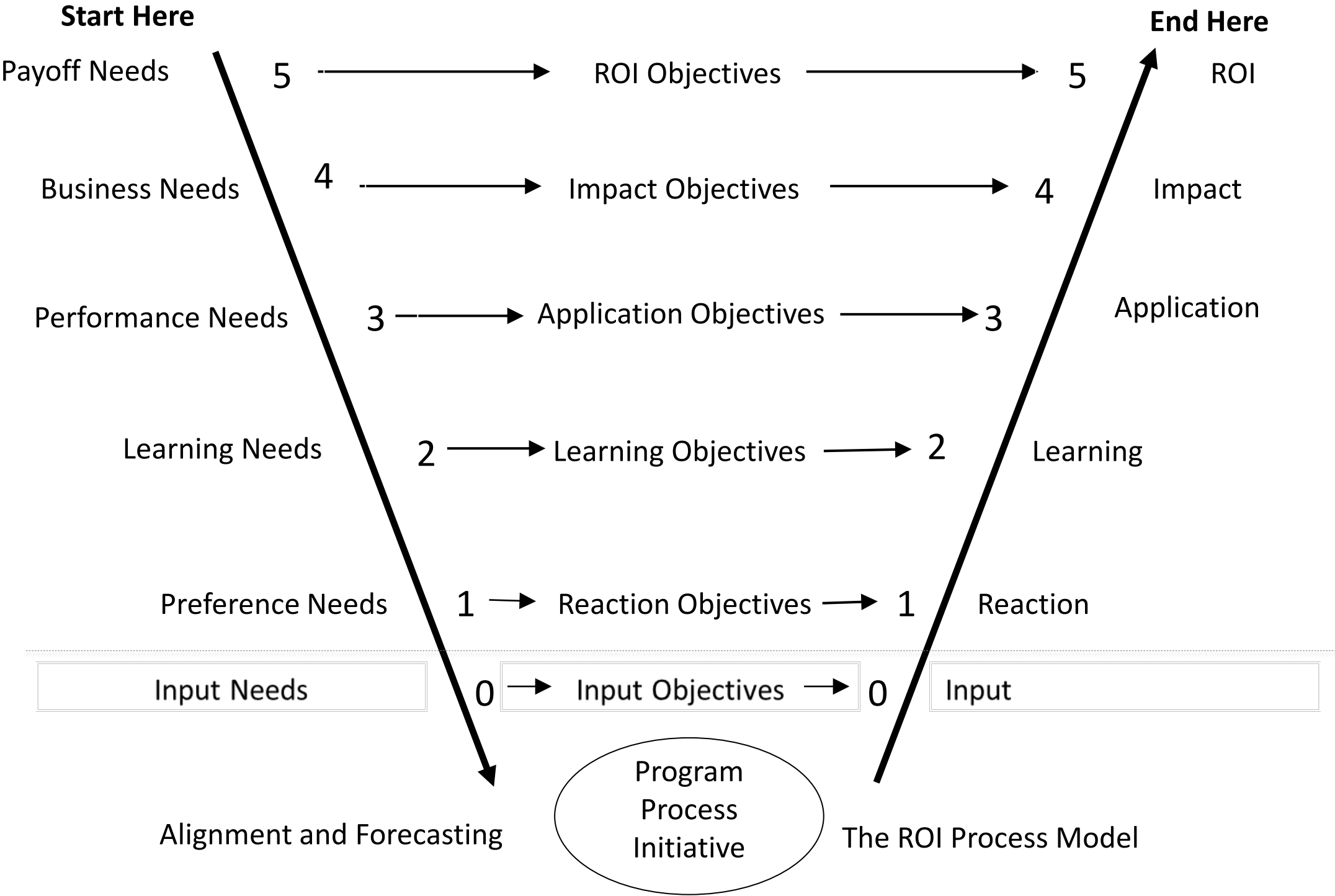
$$\text{BCR} = \frac{\$750,000}{\$425,000}$$

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

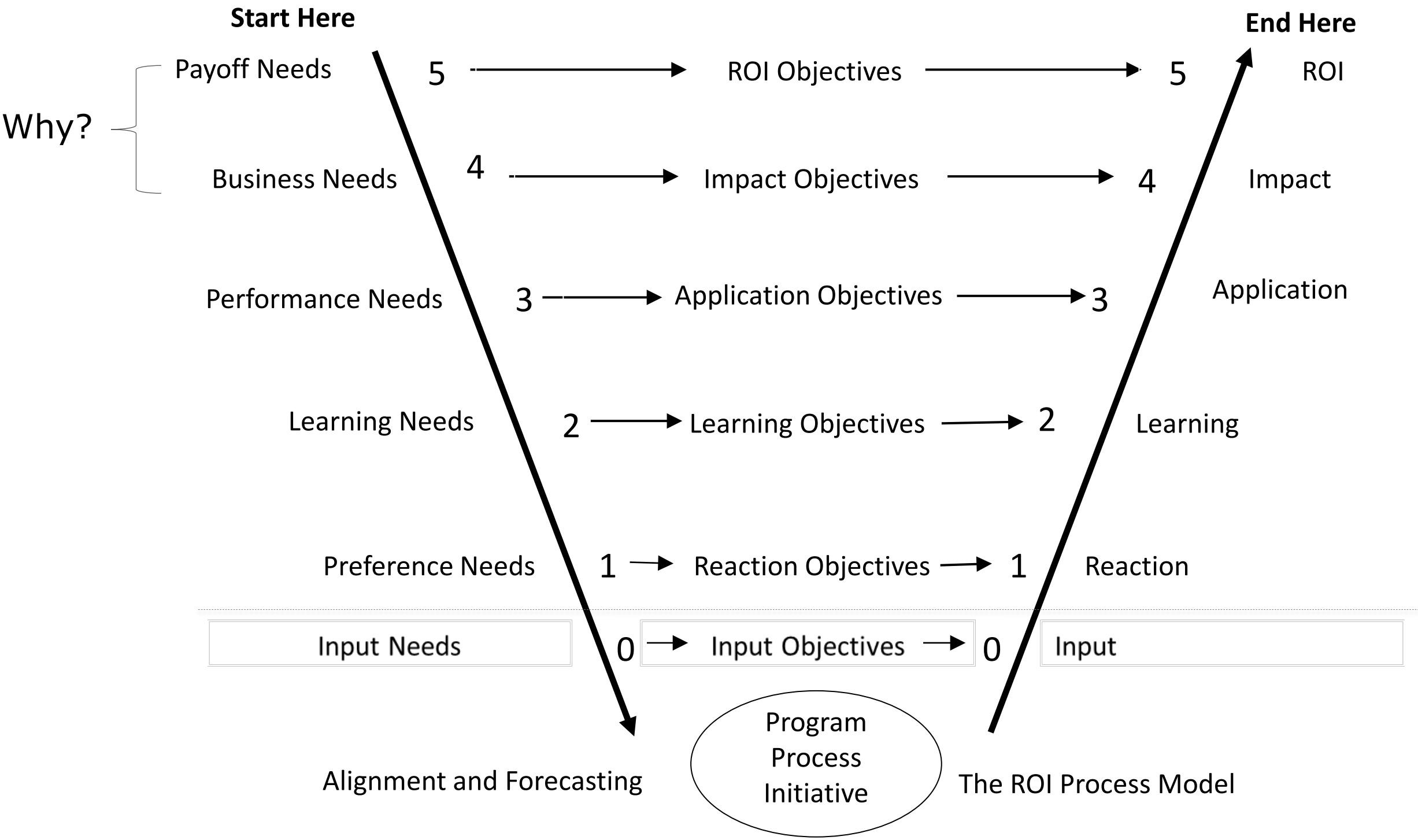
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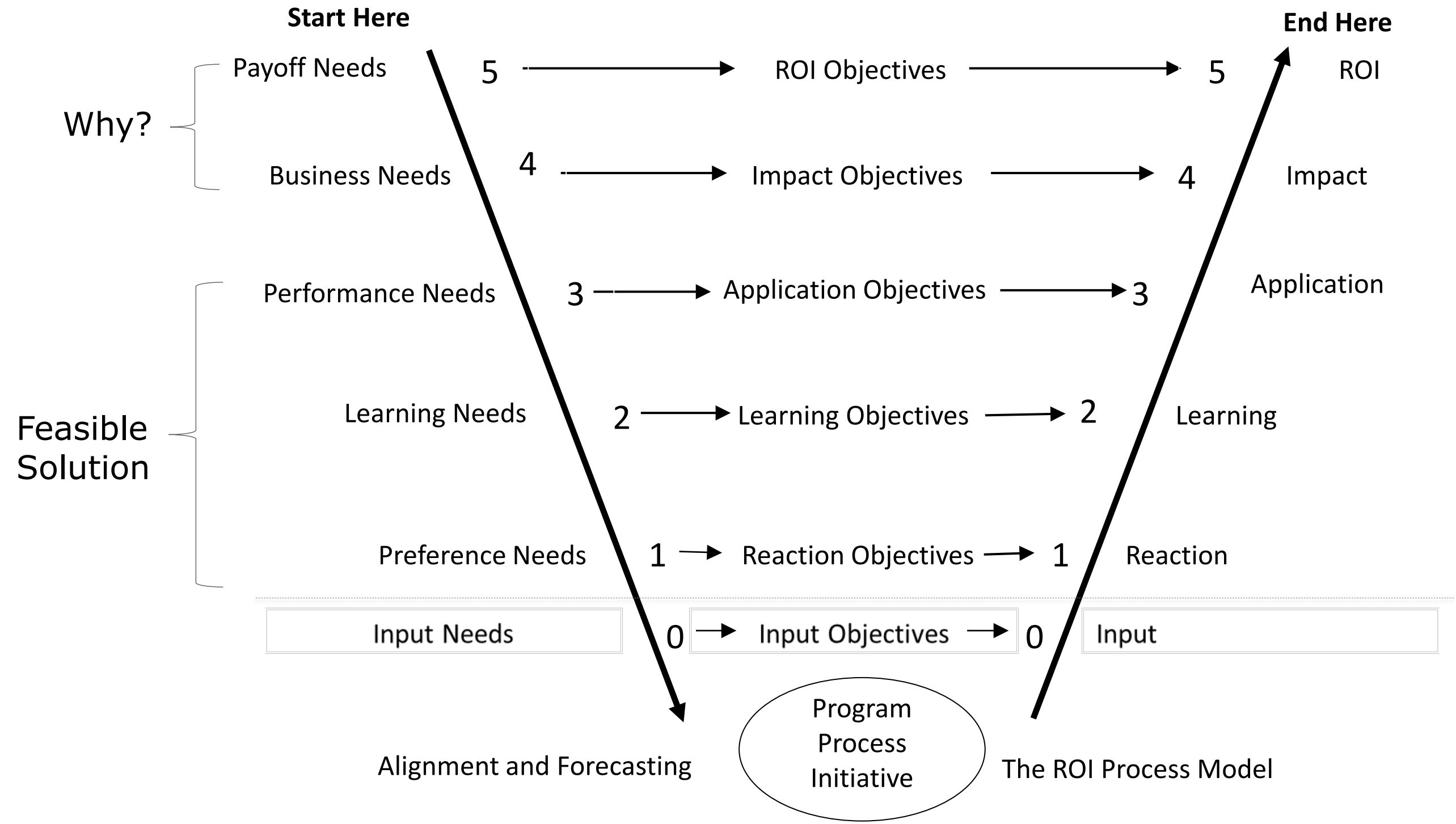
Alignment Model



Alignment Model

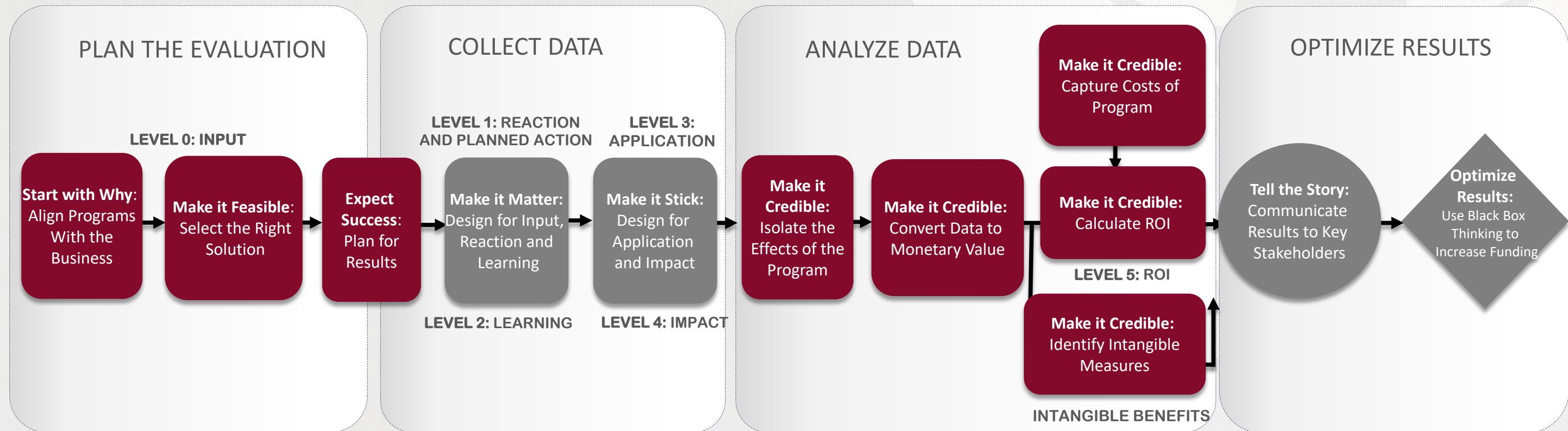


Alignment Model



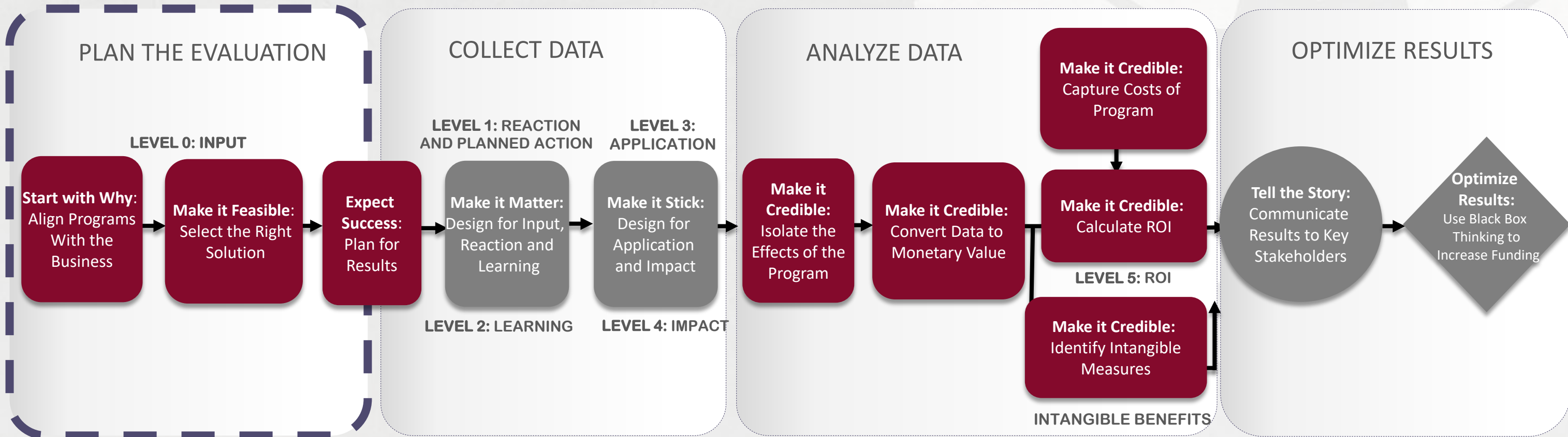
The ROI Methodology Process Model

Designing for the Delivery of Business Results



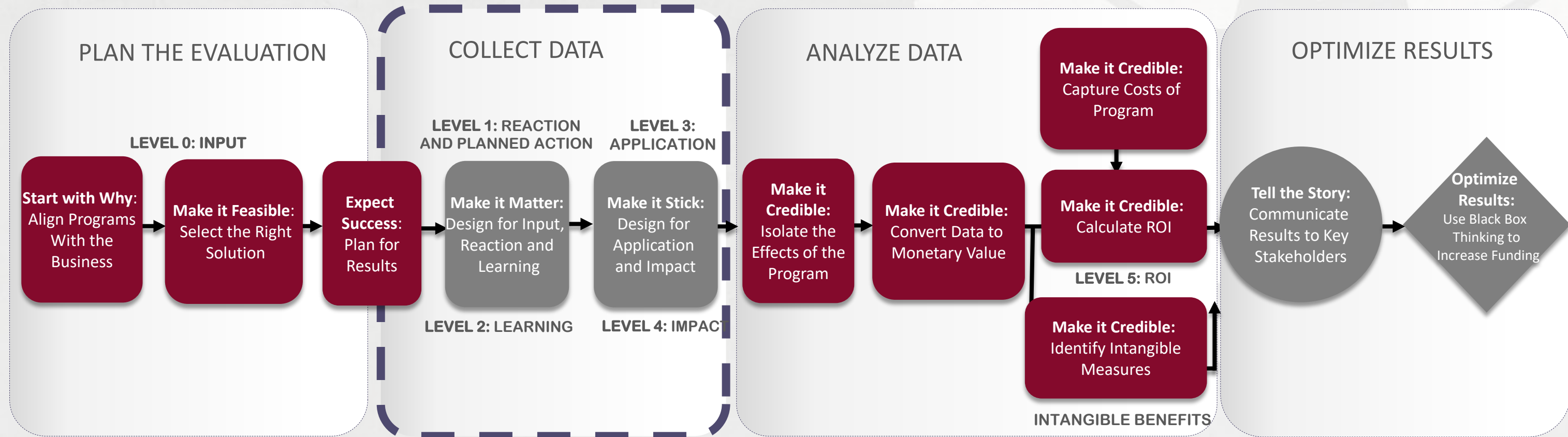
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Designing for the Delivery of Business Results



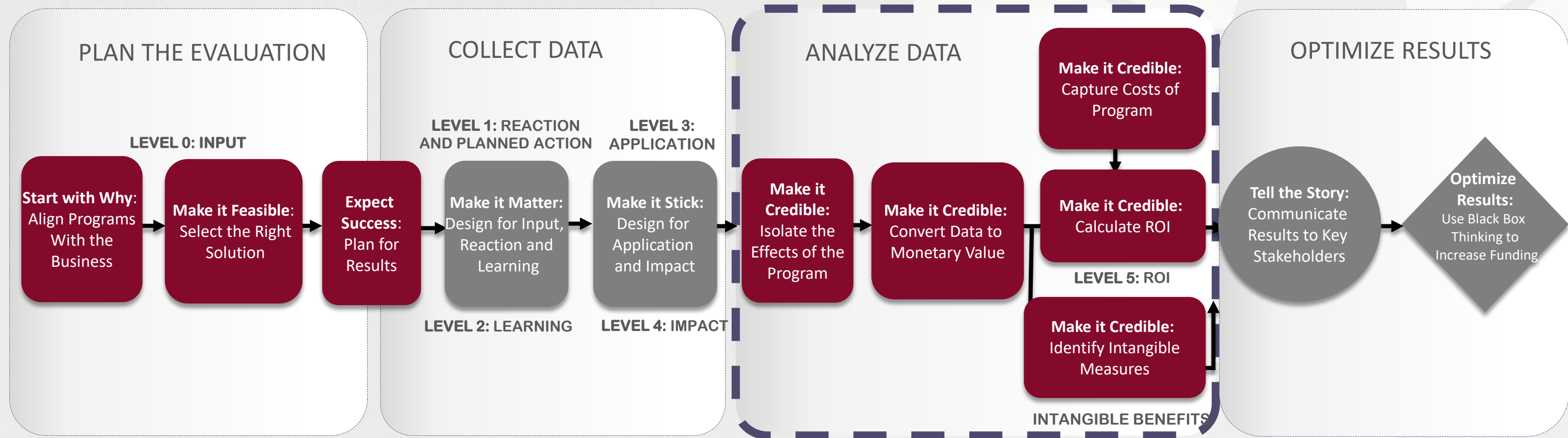
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Designing for the Delivery of Business Results



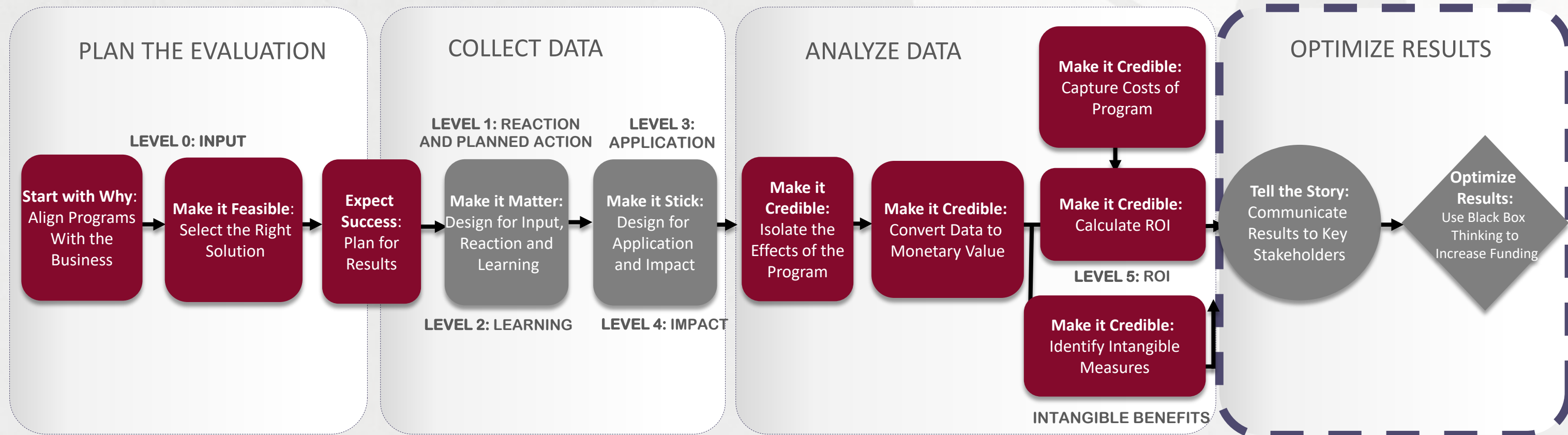
The ROI Methodology Process Model

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The ROI Methodology Process Model

Designing for the Delivery of Business Results



Twelve Guiding Principles of ROI

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.

Data Collection Plan

Program:_____

Responsibility: _____

Date:_____

Level	Broad Program Objective(s)	Measures	Data Collection Method/ Instruments	Data Sources	Timing	Responsibilities
1	Reaction/Satisfaction and Planned Actions					
2	Learning					
3	Application/ Implementation					
4	Business Impact					
5	ROI	Comments:				

ROI Analysis Plan

Program:_____

Responsibility: _____

Date:_____

Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/ Process	Methods of Converting Data to Monetary Values	Costs	Intangible Benefits	Communica- tion Targets for Final Report	Other Influences/ Issues During Application	Comments

Principles of Supervision

Considerations for Demonstrating the Impact and ROI

Start with Why

Payoff Need	Organization wants to develop a culture of collaboration focused on organizational excellence within Systemwide HR, the 23 campuses, and the Chancellor's Office
Business Need	• Increase employee engagement / Employer of choice (NPS from employer of choice – employee referrals.) • Improve teamwork • Improve efficiencies and productivity • Reduce grievances

Make it Feasible

Performance Needs	• Team members are not collaborating, they work in silos • Performance conversations are not taking place and when they do, it is a one-and-done event with little support to address performance gaps • Supervisors do not delegate, denying employees the opportunity to expand their capability • Supervisors do not foster or encourage teamwork
Solution	Principles of Supervision

Make it Feasible

Learning Needs	• Set goals and standards • Coach employees on performance • Lead development discussion with high-performing employees • Diagnose reasons for performance problems and how to address them • Personalize approach to motivate employees • Basic functions of management impact on goal achievement
Preference Needs	• Relevant content to ensure buy-in from target participants and their supervisors/managers • Interactive • Accessible to the audience from their preferred work location
Inputs	• Managers, supervisors, and leads who are either new to supervising others or already manage a team but need a 'refresher' • Investment to cover assessment, design, development, implementation, and evaluation

Matching Objectives with Levels of Evaluation

Read each objective. Determine the level of evaluation it represents.

	Broad Objectives	Level of Evaluation
1	Participants are able to diagnose performance problems and how to address them.	
2	Participants will encourage more inclusive collaboration on project teams.	
3	Complaints due to lack of teamwork will decrease.	
4	Six months after the program, employee engagement will increase 25%.	
5	Achieve program Net Promoter Score of 30%.	
6	The program will generate an ROI of 25%.	
7	Participants will know how to personalize their approach to motivating employees.	
8	Participants will delegate work, enabling employees to expand their capability.	
9	The number of grievances will decline 15% in 12 months.	
10	Measures of efficiency and productivity as defined by participants will improve within six months.	

Expect Success: Principles of Supervision

Levels of Objectives	
Level 1, Reaction	At the end of the program, participants indicate: The content is relevant, participation is worth the time, the course delivery interactive, and the program easily accessible (90% score 4 out of 5 on Likert agreement; Net Promoter Score of 50)
Level 2, Learning	At the end of the program, participants report they are able to: • Set goals and standards • Coach employees on performance • Lead development discussion with high-performing employees • Diagnose reasons for performance problems and how to address them • Personalize approach to motivate employees • Basic functions of management impact on goal achievement
Level 3, Application	Three months following the program participants and their employees report: • Greater, more inclusive collaboration • Performance conversations occur formally and informally • Development conversations are occurring with high-performing employees • Supervisors coach employees on performance • Supervisors delegate work that enables employee growth • Supervisors foster teamwork

Expect Success: Principles of Supervision

Levels of Objectives	
Level 4, Impact	Six months after the program • Engagement scores increase X% • Employees report more collaborative teamwork • Employees report less stress • Measures of efficiency and productivity as defined by participants improve (targets set by participants)
Level 5, ROI	25%

Remember: Specificity drives results;
vague and nebulous gives you vague and nebulous!

Data Collection Plan

Program:_____

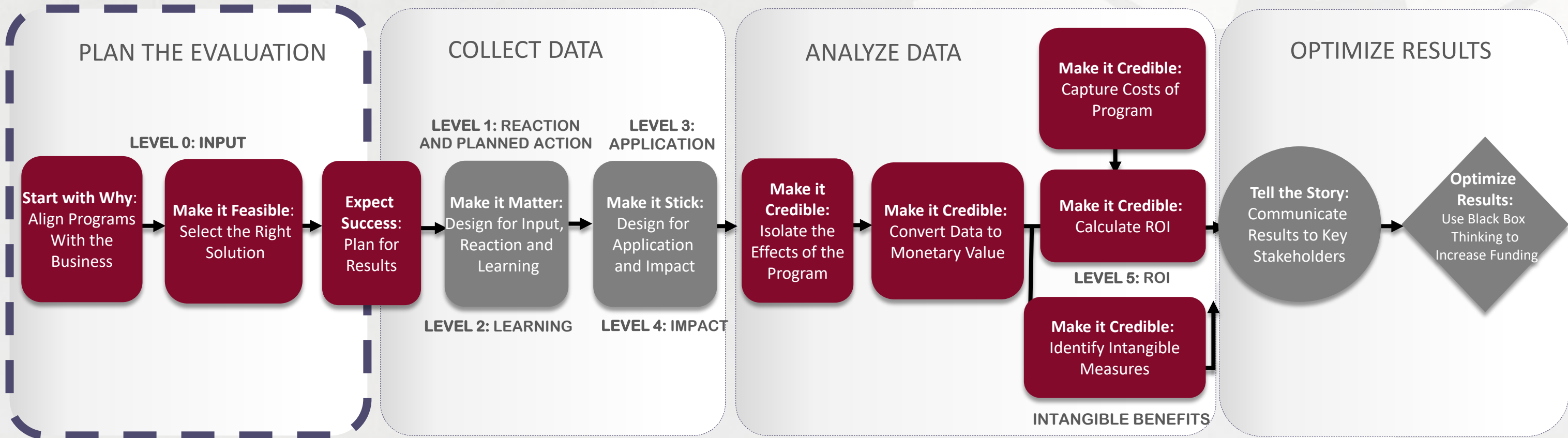
Responsibility: _____

Date:_____

Level	Broad Program Objective(s)	Measures	Data Collection Method/ Instruments	Data Sources	Timing	Responsibilities
1	Reaction/Satisfaction and Planned Actions					
2	Learning					
➡ 3	Application/ Implementation					
➡ 4	Business Impact					
5	ROI	Comments:				

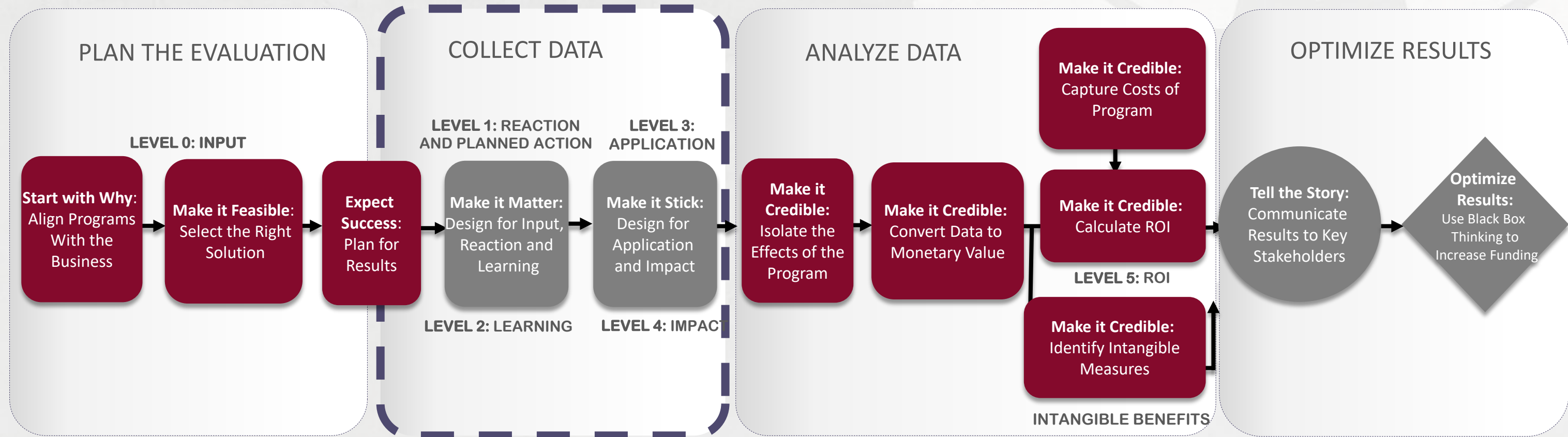
The ROI Methodology Process Model

Designing for the Delivery of Business Results



The ROI Methodology Process Model

Designing for the Delivery of Business Results



Expect Success: Data Collection at Level 3 and Level 4

Levels of Objectives	
Level 3, Application	Three months following the program participants and their employees report: • Greater, more inclusive collaboration • Performance conversations occur formerly and informally • Development conversations are occurring with high-performing employees • Supervisors coach employees on performance • Supervisors delegate work that enables employee growth • Supervisors foster teamwork
Level 4, Impact	Six months after the program • Engagement scores increase X% • Employees report more collaborative teamwork • Employees report less stress • Measures of efficiency and productivity as defined by participants improve (targets set by participants)

Given these broad objectives, what is the first thing you would do?

Selecting Data Collection Methods

- Time required for participants
- Time required for participant's supervisor
- Costs of method
- Amount of disruption of normal activities
- Accuracy
- Utility
- Culture / Philosophy

Collect Data During and After the Program

Method	Level			
	1	2	3	4
• Surveys	✓	✓	✓	
• Questionnaires	✓	✓	✓	✓
• Observation	✓	✓	✓	
• Interviews	✓	✓	✓	
• Focus Groups	✓	✓	✓	
• Tests/Quizzes		✓		
• Demonstrations		✓		
• Simulations		✓		
• Action planning/improvement plans			✓	✓
• Performance contracting			✓	✓
• Performance monitoring				✓

Poll: How would you collect the Level 3 data?

- ❑ Questionnaire
- ❑ Observation
- ❑ Interviews
- ❑ Focus groups
- ❑ Demonstrations
- ❑ Action plans
- ❑ Performance monitoring
- ❑ Other

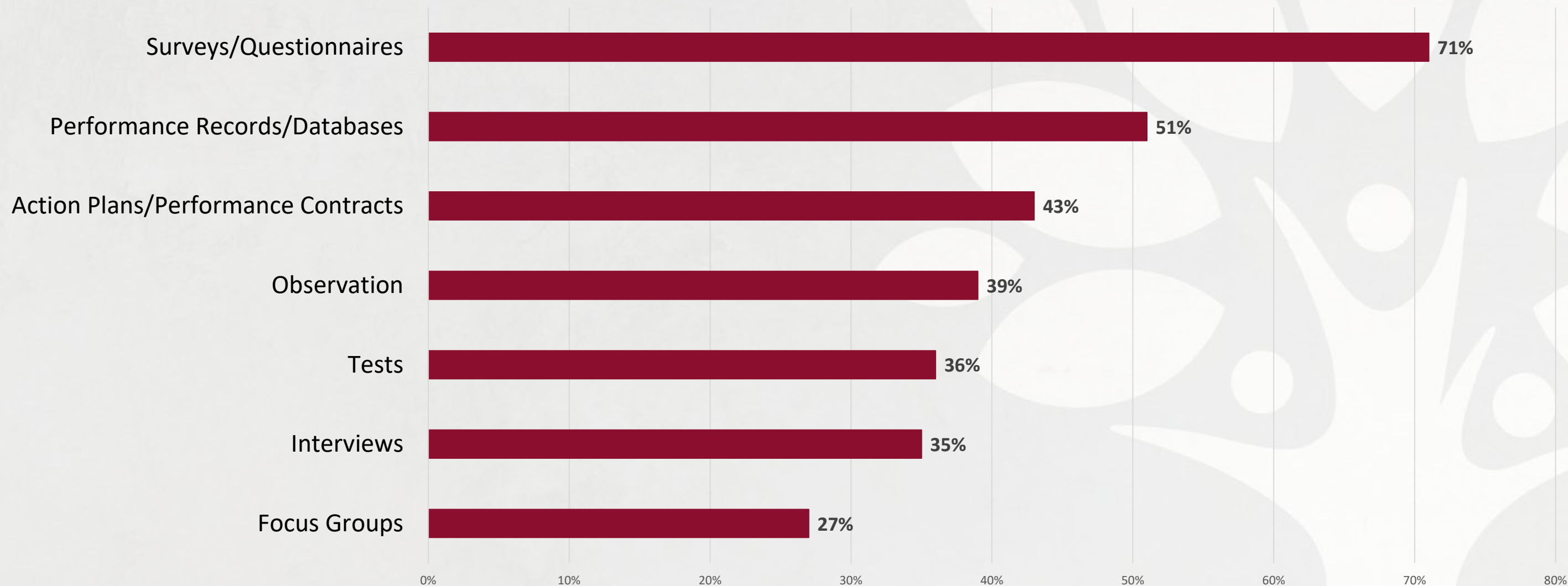


Poll: How would you collect the Level 4 data?

- ❑ Questionnaire
- ❑ Observation
- ❑ Interviews
- ❑ Focus groups
- ❑ Demonstrations
- ❑ Action plans
- ❑ Performance monitoring
- ❑ Other



Data Collection Methods



*Survey of Users, N = 246

Follow-Up Questionnaire Content Issues Checklist

- Progress with Objectives
- Action Plan Implementation
- Relevance of Program
- Perceived Value
- Use of Materials, Guides, and Technology
- Knowledge/Skill Enhancement
- Skills Used, Tasks Followed
- Changes with Work
- Linkage with Output Measures
- Other Benefits
- Barriers
- Enablers
- Management Support
- Other Solutions
- Recommendations for Target Audience
- Suggestions for Improvement
- Other Comments
- Improvements/Accomplishments*
- Improvement Linked with Program*
- Monetary Impact*
- Confidence Level*

*Optional

Possible Questions

	Post-Program (n = 42)
A. Overall, how much of your current job requires the use of all nine skills?	75.2%
B. Overall, how much more proficient are you with these skills since participating in the program?	45.9%
C. Given that other factors can influence proficiency in skills and capability, how much of your gain in proficiency is due to your participating in this program?	56.5%
D. How confident are you in the estimates you provided?	77.9%
E. Increased job contribution to the organization. (A x B x C x D = E)	15.2%

If you want to forecast ROI, you could add:

	Post-Program (n = 42)
A. Overall, how much of your current job requires the use of all nine skills?	75.2%
B. Overall, how much more proficient are you with these skills since participating in the program?	45.9%
C. Given that other factors can influence proficiency in skills and capability, how much of your gain in proficiency is due to your participating in this program?	56.5%
D. How confident are you in the estimates you provided?	77.9%
E. Increased job contribution to the organization. (A x B x C x D = E)	15.2%
F. Estimated salary \$100,000 plus 35% benefits factor (F)	\$135,000
G. Average monetary benefit to the organization. (E x F = G)	\$20,520
H. Estimated fully-loaded costs. (registration, completion/practice time, materials, etc.)	\$5,000
ROI = $[(G - H) / H] \times 100$	310%

Data Collection Plan

Program: _____ Responsibility: _____ Date: _____

Level	Broad Program Objective(s)	Measures	Data Collection Method/ Instruments	Data Sources	Timing	Responsibilities
1	Reaction/Satisfaction and Planned Actions					
2	Learning					
3	Application/ Implementation	90% indicate use of skills 10% increase in job contribution - Barriers and Enablers - Action Plans Completed	Questionnaire Action Plans			
4	Business Impact	- Engagement scores increase X% - Employees report more collaborative teamwork - Employees report less stress - Measures of efficiency and productivity as defined by participants improve (targets for 3 measures set by participants)	Engagement survey Questionnaire Action Plans			
5	ROI 25%	Comments: Forecast at three month using modified utility analysis. Calculate actual ROI based on productivity and efficiency.				



Sources of Information

- Participants
- Supervisors of participants
- Direct reports of participants
- Peer group
- Internal staff
- External group
- Organizational performance records

Data Collection Plan

Program: _____ Responsibility: _____ Date: _____

Level	Broad Program Objective(s)	Measures	Data Collection Method/ Instruments	Data Sources	Timing	Responsibilities
1	Reaction/Satisfaction and Planned Actions					
2	Learning					
3	Application/ Implementation	90% indicate use of skills 5% increase in job contribution - Barriers and Enablers - Action Plans Completed	Questionnaire Action Plans	Participants Managers Participants		
4	Business Impact	- Engagement scores increase X% - Employees report more collaborative teamwork - Employees report less stress - Measures of efficiency and productivity as defined by participants improve (targets for 3 measures set by participants)	Engagement survey Questionnaire Action Plans	Employees – Participants Participants Managers Participants		
5	ROI 25%	Comments: Forecast at three month using modified utility analysis. Calculate actual ROI based on productivity and efficiency.				

Timing of Follow-up

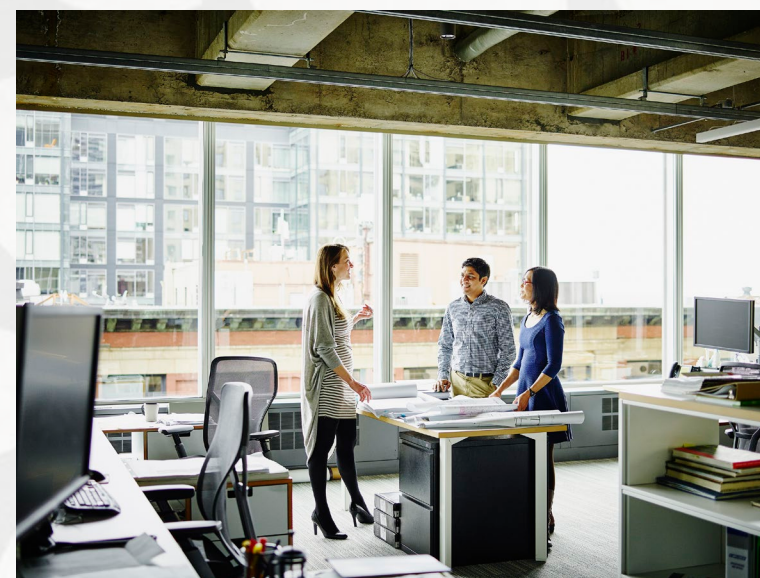
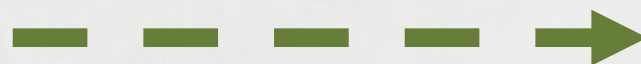


- Availability of Data
- Ideal Time for Application (Level 3)
- Ideal Time for Business Impact (Level 4)
- Convenience of Collection
- Constraints on Collection

Collect follow-up data at a time when participants should be using what they learn routinely.



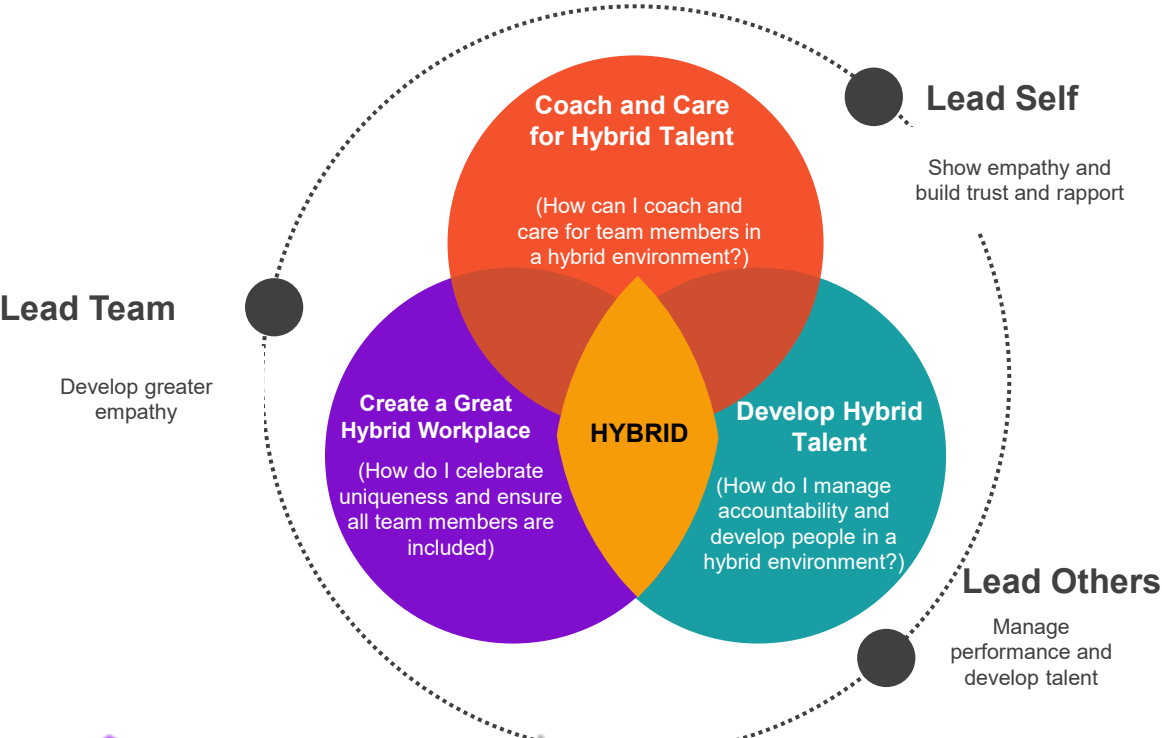
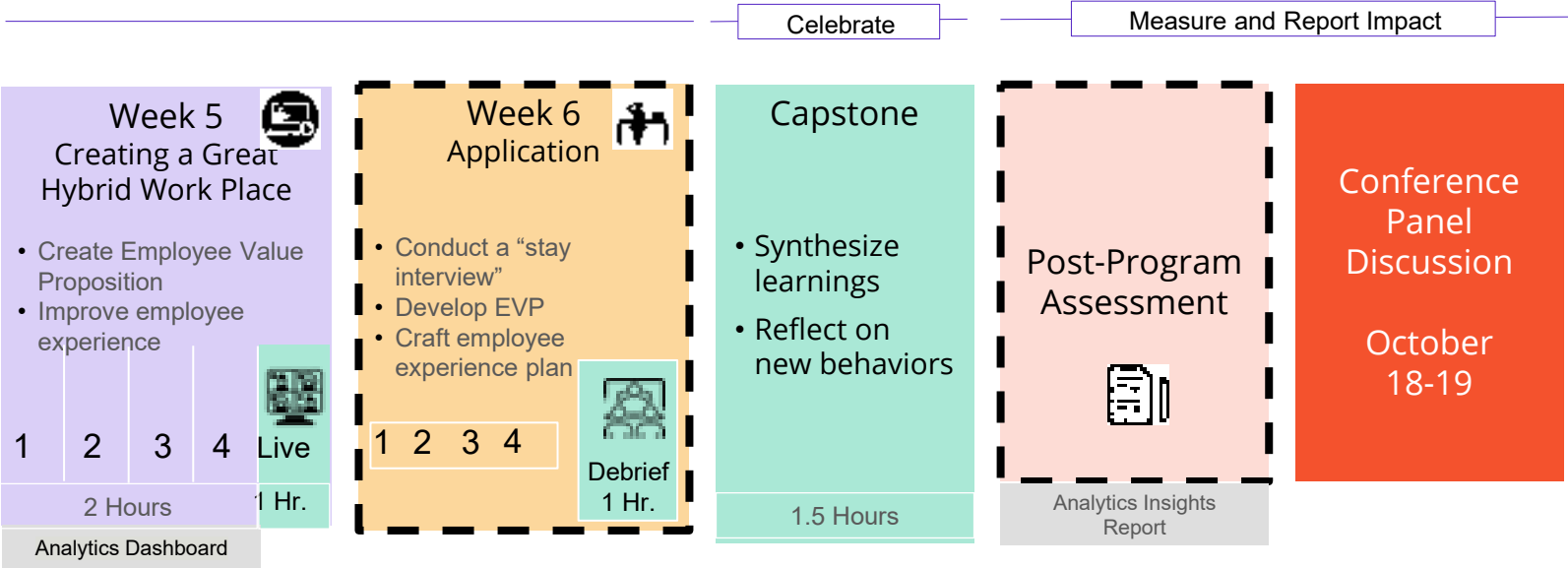
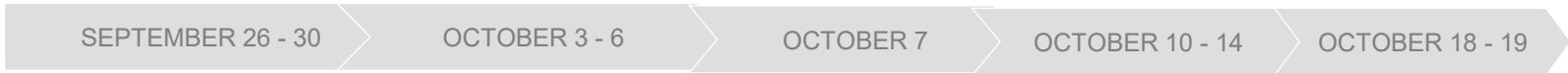
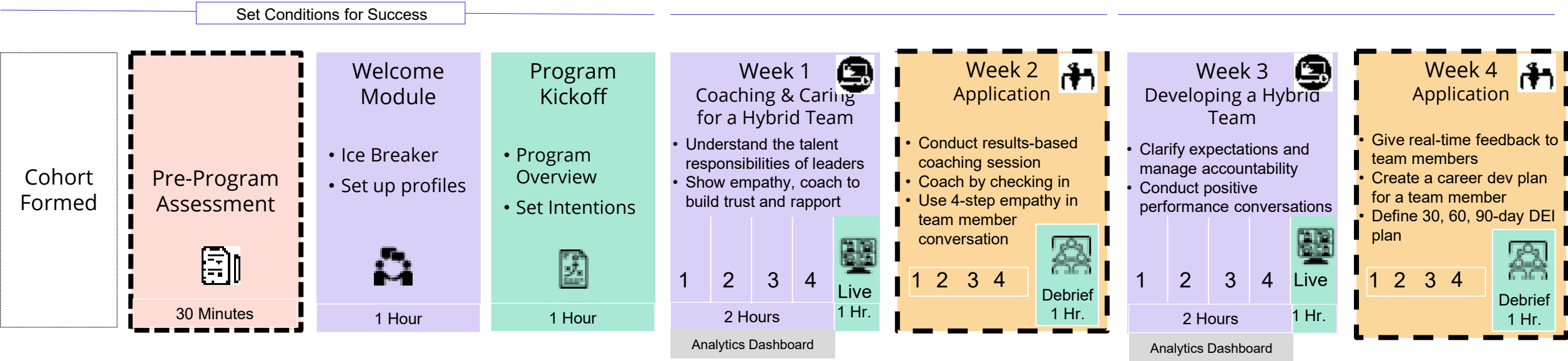
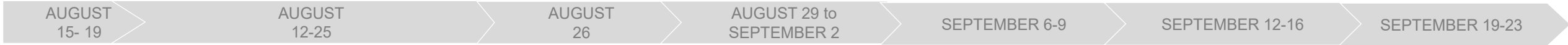
Level 1 Reaction
Level 2 Learning



Level 3 Application
Level 4 Impact

*While there are times when you will collect Level 3 and Level 4 data at the same time, there will be times when you will need to wait to collect Level 4 data until measures have had an opportunity to improve or when is more convenient to collect Level 4 data.

Leading in a Hybrid Work Environment: Program at A Glance



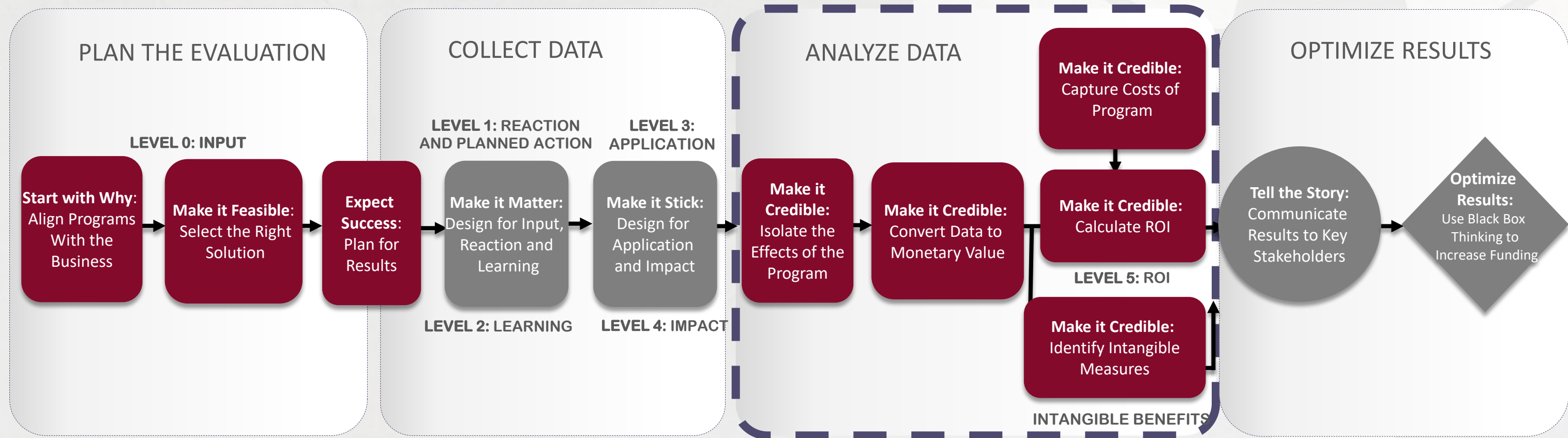
Data Collection Plan

Program: _____ Responsibility: _____ Date: _____

Level	Broad Program Objective(s)	Measures	Data Collection Method/ Instruments	Data Sources	Timing	Responsibilities
1	Reaction/Satisfaction and Planned Actions					
2	Learning					
3	Application/ Implementation	90% indicate use of skills 5% increase in job contribution - Barriers and Enablers - Action Plans Completed	Questionnaire	Participants Managers	Three months	Evaluation Lead
			Action Plans	Participants	Six months post-program	
4	Business Impact	- Engagement scores increase X% - Employees report more collaborative teamwork - Employees report less stress - Employees report less stress - Measures of efficiency and productivity as defined by participants improve (targets for 3 measures set by participants)	Engagement survey	Employees – Participants	Six months post-program	Evaluation Lead
			Questionnaire	Participants Managers	Three-months post-program	
			Action Plans	Participants	Six months post program	
5	ROI 25%	Comments: Forecast at three month using modified utility analysis. Calculate actual ROI based on productivity and efficiency.				

The ROI Methodology Process Model

Designing for the Delivery of Business Results



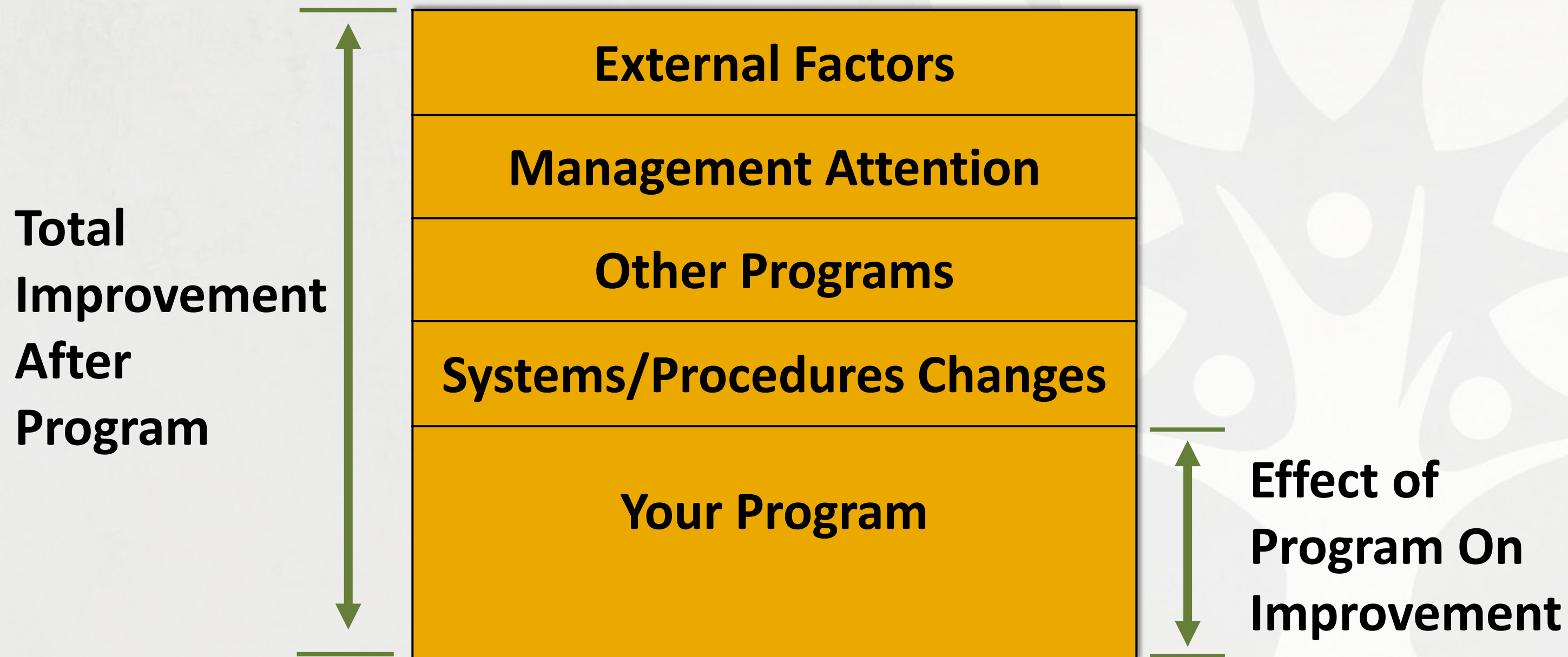
ROI Analysis Plan

Program:_____

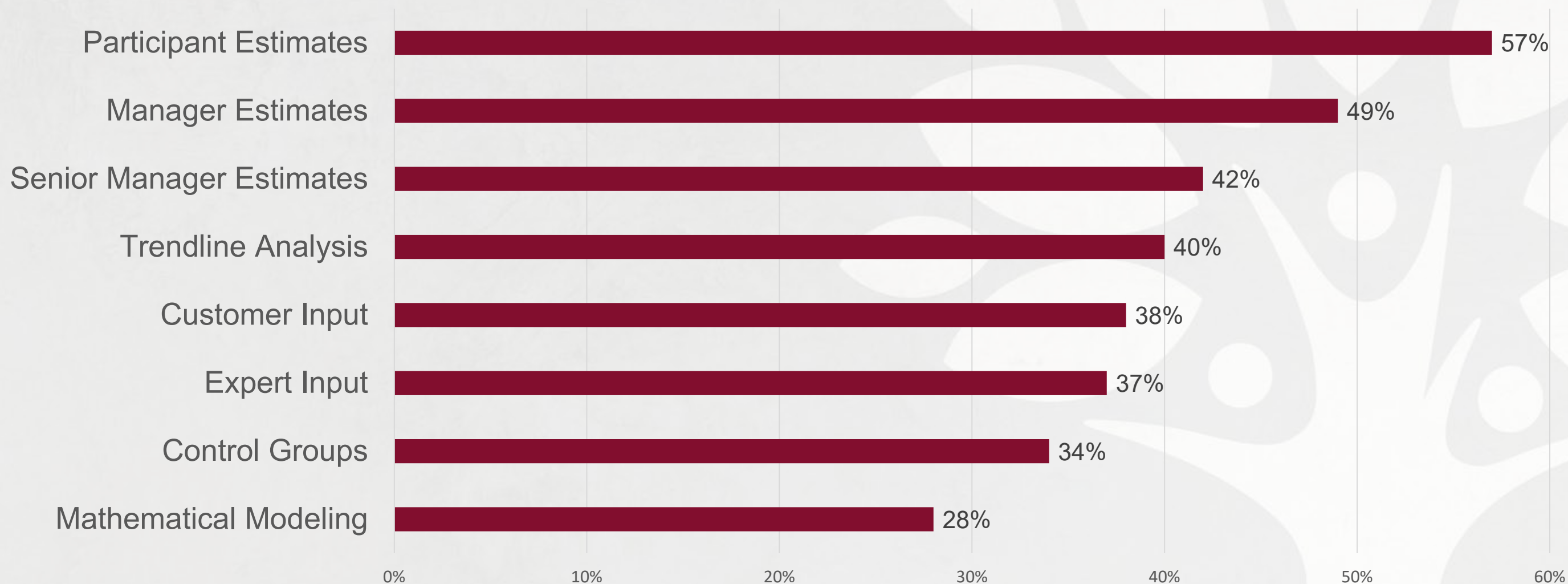
Responsibility: _____

Date:_____

Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/ Process	Methods of Converting Data to Monetary Values	Costs	Intangible Benefits	Communica- tion Targets for Final Report	Other Influences/ Issues During Application	Comments
Engagement scores increase X%						Other programs Network/mentor Manager support Job market	
Employees report more collaborative teamwork							
Employees report less stress							
Three measures per participants							



Isolate Program Effects



*Sample of selected users n = 246

ROI Analysis Plan

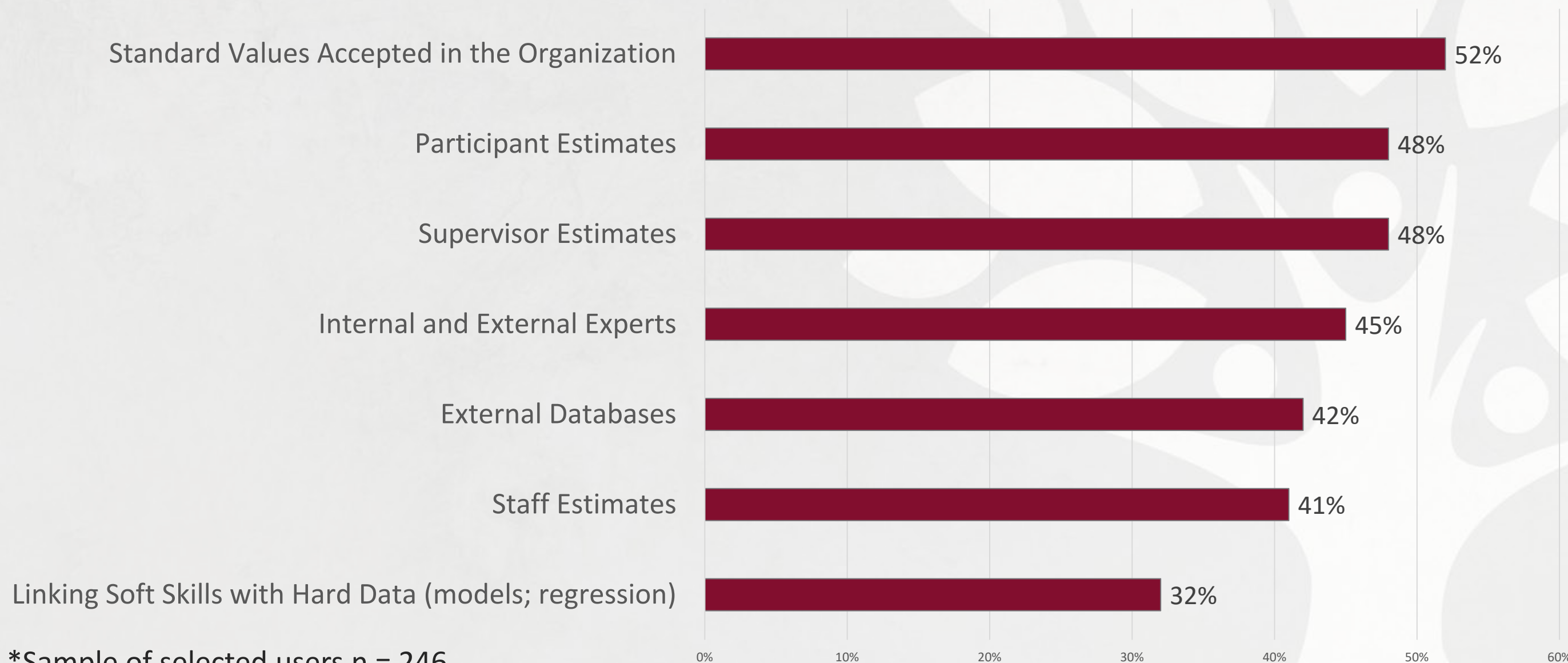
Program:_____

Responsibility: _____

Date: _____

Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/ Process	Methods of Converting Data to Monetary Values	Costs	Intangible Benefits	Communica- tion Targets for Final Report	Other Influences/ Issues During Application	Comments
Engagement scores increase X%	Participant / Manager Estimates					Other programs Network/mentor Manager support Job market	
Employees report more collaborative teamwork	Participant / Manager Estimates						
Employees report less stress	Participant / Manager Estimates						
Three measures per participant	Participant / Manager Estimates						

Convert Data to Money



*Sample of selected users n = 246

Action Plan

Name: Caroline Dobson Coach: Pamela Mills Follow-Up Date 1 September
Objective: Improve retention for staff Evaluation Period: January to July
Improvement Measure: Voluntary turnover Current Performance 28% Annual Target Performance 15% Annual

Action Steps		Analysis
1. <u>Meet with team to discuss reasons for turnover – using problem-solving skills.</u>	31 Jan	A. What is the unit of measure? <u>One voluntary turnover</u>
2. <u>Review exit interview data with HR – look for trends and patterns.</u>	15 Feb	B. What is the value (cost) of one unit? <u>Salary × 1.3</u>
3. <u>Counsel with “at-risk” employees to correct problems and explore opportunities for improvement.</u>	1 Mar	C. How did you arrive at this value? <u>Standard Value</u>
4. <u>Develop individual development plan for high-potential employees.</u>	5 Mar	D. How much did the measure change during the evaluation period? <u>11% (annual %) (4 turnovers annually)</u>
5. <u>Provide recognition to employees with long tenure.</u>	Routinely	E. What other factors could have contributed to this improvement? <u>Growth opportunities, changes in job market</u>
6. <u>Schedule appreciation dinner for entire team.</u>	31 May	F. What percent of this change was actually caused by this program? <u>75%</u>
7. <u>Encourage team leaders to delegate more responsibilities.</u>	31 May	G. What level of confidence do you place on the above information? (100% = Certainty and 0% = No Confidence) <u>90%</u>
8. <u>Follow-up with each discussion and discuss improvement or lack of improvement and plan other action..</u>	Routinely	
9. <u>Monitor improvement and provide recognition when appropriate.</u>	11 May	
Intangible Benefits: <u>Less stress on team, greater job satisfaction</u>		

Comments: Great Coach – She kept me on track with this issue.

Action Plan Output

Exec #	Measurement Area	Total Annual Value	Basis	Method for Converting Data	Contribution Factor	Confidence Estimate	Adjusted Value
1	Revenue growth	\$ 11,500	Profit margin	Standard value	33%	70%	\$ 2,656
2	Retention	175,000	3 turnovers	Standard value	40%	70%	49,000
3	Retention	190,000	2 turnovers	Standard value	60%	80%	91,200
4	Direct cost savings	75,000	From cost statements	Participant estimate	100%	100%	75,000
5	Direct cost savings	21,000	Contract services	Standard value	75%	70%	11,025
6	Direct cost savings	65,000	Staffing costs	Standard value	70%	60%	27,300
7	Retention	150,000	2 turnovers	Standard value	50%	50%	37,500
8	Cost savings	70,000	Security	Standard value	60%	90%	37,800
9	Direct cost savings	9,443	Supply costs	N/A	70%	90%	5,949
10	Efficiency	39,000	Information technology costs	Participant estimate	70%	80%	21,840
11	Retention	215,000	4 turnovers	Standard value	75%	90%	145,125
12	Productivity	13,590	Overtime	Standard value	75%	80%	8,154
13	Retention	73,000	1 turnover	Standard value	50%	80%	29,200
14	Retention	120,000	2 annual turnovers	Standard value	60%	75%	54,000
15	Retention	182,000	4 turnovers	Standard value	40%	85%	61,880
16	Cost savings	25,900	Travel	Standard value	30%	90%	6,993
17	Cost savings	12,320	Administrative support	Standard value	75%	90%	8,316
18	Direct cost savings	18,950	Labor savings	Participant estimate	55%	60%	6,253
19	Revenue growth	103,100	Profit margin	Participant estimate	75%	90%	69,592
20	Revenue	19,500	Profit	Standard value	85%	75%	12,431
21	Revenue	21,230	Profit %	Standard value	80%	70%	18,889
22	Revenue growth	105,780	Profit margin	Standard value	70%	50%	37,023
		TOTAL \$1,716,313					TOTAL \$817,126 2 nd Measure Total \$649,320 3 rd Measure Total \$394,712 TOTAL Benefits \$1,861,158

ROI Analysis Plan

Program:_____

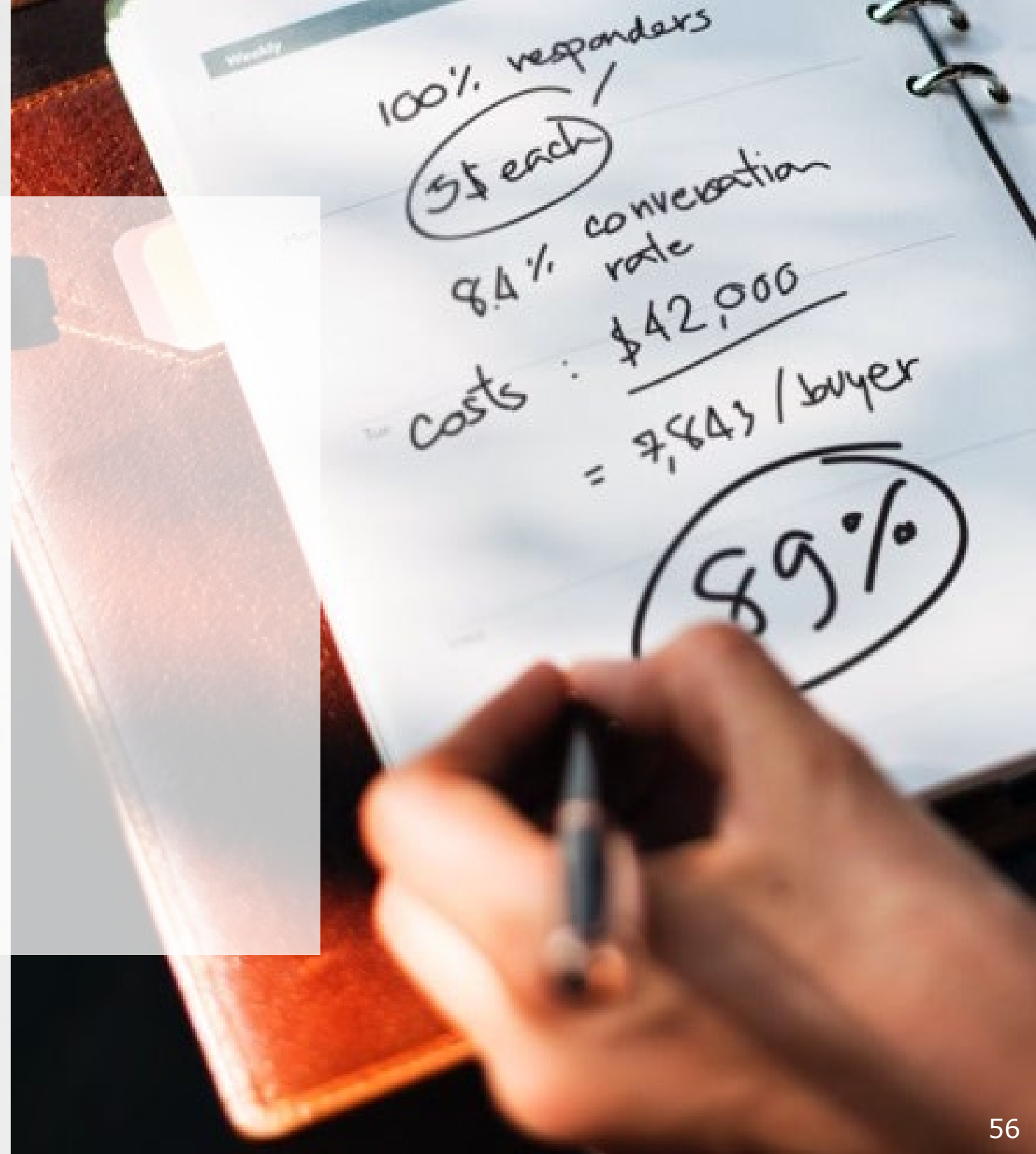
Responsibility: _____

Date:_____

Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/ Process	Methods of Converting Data to Monetary Values	Costs	Intangible Benefits	Communica- tion Targets for Final Report	Other Influences/ Issues During Application	Comments
Engagement scores increase X%	Participant / Manager Estimates	NA				Other programs Network/mentor Manager support Job market	
Employees report more collaborative teamwork	Participant / Manager Estimates	Estimates					
Employees report less stress	Participant / Manager Estimates	NA					
Three measures per participant	Participant / Manager Estimates	Standard values, experts, historical costs, estimates					

Tabulate fully-loaded costs.

- Assessment costs (prorated)
- Development costs (prorated)
- Program materials
- Instructor/facilitator/project lead costs
- Facilities costs
- Travel/lodging/meals
- Participant salaries and benefits
- Administrative/overhead costs
- Evaluation costs



Report the Intangibles

- Adaptability
- Awards
- Brand awareness
- Caring
- Creativity
- Culture
- Decisiveness
- Engagement
- Image
- Leadership
- Networking
- Organizational climate
- Organizational commitment
- Partnering
- Reputation
- Resilience
- Stress
- Teamwork



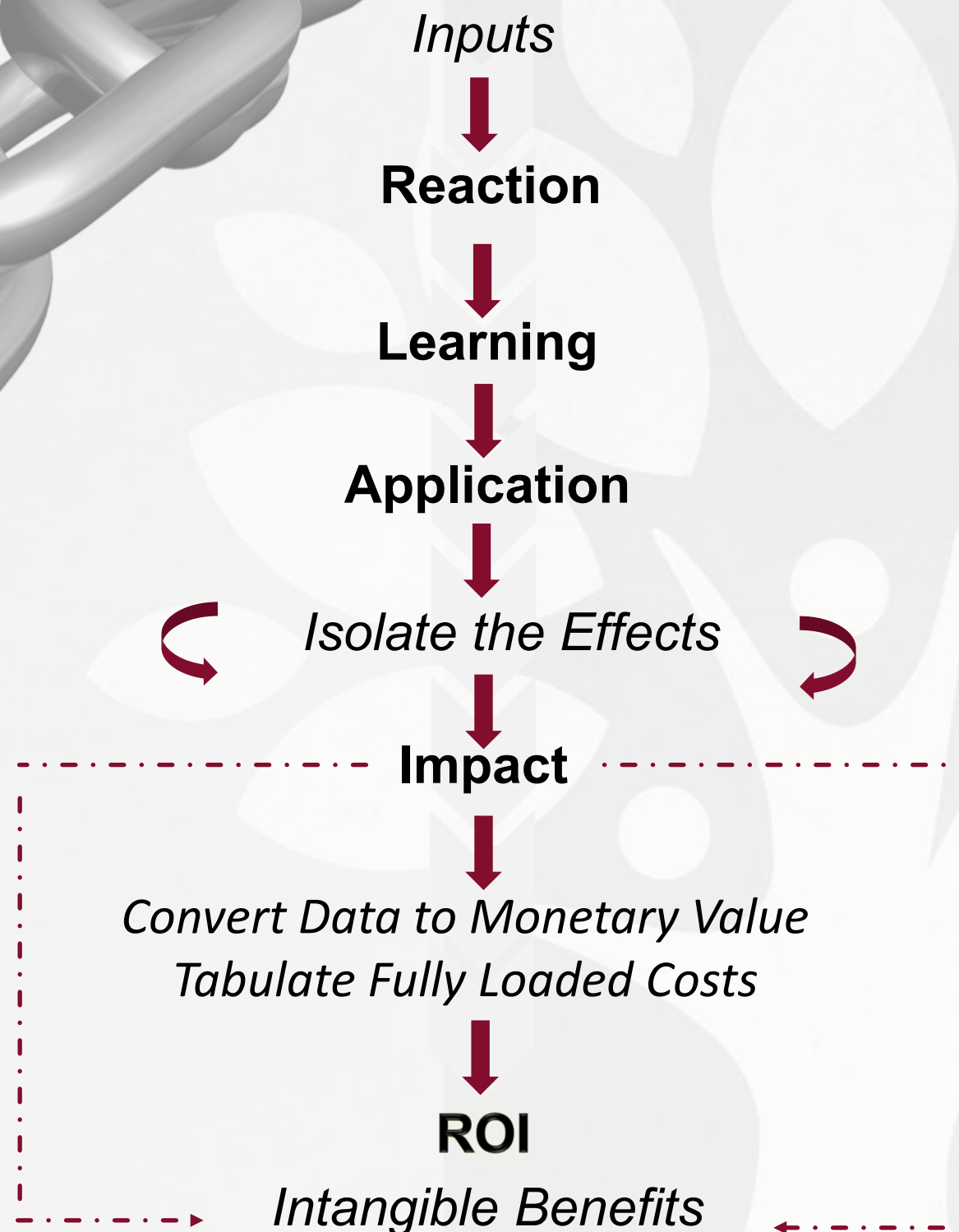
ROI Analysis Plan

Program:_____

Responsibility: _____

Date:_____

Data Items (Usually Level 4)	Methods for Isolating the Effects of the Program/ Process	Methods of Converting Data to Monetary Values	Costs	Intangible Benefits	Communica- tion Targets for Final Report	Other Influences/ Issues During Application	Comments
Engagement scores increase X%	Participant / Manager Estimates	NA	Assessment costs (prorated)	Readiness	Client (Funder)	Other programs	
Employees report more collaborative teamwork	Participant / Manager Estimates	Estimates	Development costs (prorated)	Engagement	Participants	Network/mentor	
Employees report less stress	Participant / Manager Estimates	NA	Program materials	Job confidence	Participants’	Manager support	
Three measures per participant	Participant / Manager Estimates	Standard values, experts, historical costs, estimates	Instructor/facilitator/project lead costs	Network	Managers	Job market	
			Facilities costs		Your Team		
			Travel/lodging/meals		Other		
			Participant salaries and benefits				
			Administrative/overhead costs				
			Evaluation costs				

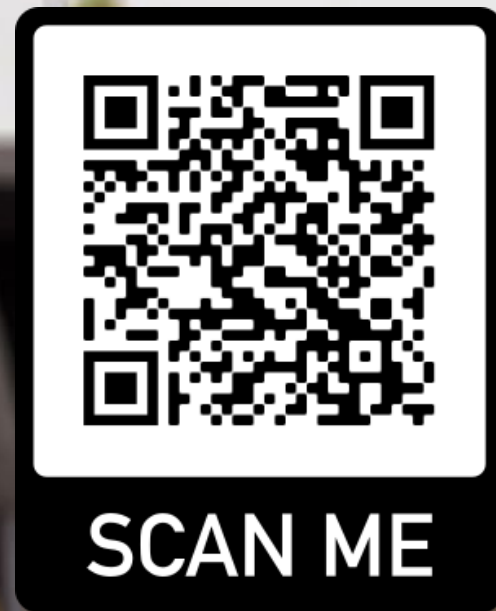


Remember

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.



Click the link below or scan the QR code to access the resources from today's session:

<https://bit.ly/CSUROI>





**Let's have a conversation.
Schedule a time that works for you.**

**<https://calendly.com/pattiphillips/connect>
patti@roiinstitute.net**

Questions?

Patti P. Phillips, Ph.D.

- CEO, ROI Institute, Inc.
- Chair, i4cp People Analytics Board
- Chair, Center for Talent Reporting Board
- Senior Advisor, The Conference Board
- Vice Chair, UN Institute for Training and Research Board of Trustees
- Member, International Federation of Training and Development Board
- Fellow, ATD Certified Professional in Talent Development
- Author, Educator, Consultant, Coach

