



1

Objectives

After completing this session, you will be able to:

- Identify the five levels of outcomes from virtual learning.
- Describe why virtual learning fails to deliver application and impact.
- Explain the need to deliver results, including impact and ROI, for selected virtual learning programs.
- Design virtual learning to deliver application, impact, and ROI.
- Plan next steps to ensure virtual learning delivers value.

2

In-Session Resource

Notes

Exercises

Action Plan

3

The ROI Methodology[®] in 12 Easy Steps

Learn the ROI Methodology in 12 easy steps. This guide is a must-have for anyone looking to understand the ROI Methodology and how to apply it to their organization.

Measuring the Success of Learning Technology

Learn how to measure the success of learning technology and how to apply the ROI Methodology to your organization.

Designing Virtual Learning for Application & Impact

Learn how to design virtual learning for application and impact and how to apply the ROI Methodology to your organization.

Effective Leadership in a Hybrid World of Work

Learn how to be an effective leader in a hybrid world of work and how to apply the ROI Methodology to your organization.

Session ROI: Designing Virtual Learning to Deliver Application, Impact, and ROI

Learn how to design virtual learning to deliver application, impact, and ROI and how to apply the ROI Methodology to your organization.

Post Session Resources



SCAN ME

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

☐ Yes

☐ No

☐ Maybe

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What prevents virtual learning from being effective?



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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.
- Not designed to deliver impact.

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

KPMG

MOBILE LEARNING MARKET VALUE

2014 2015 2016 2017 2018

Mobile learning (m-learning) is one of the fastest growing markets in e-learning, with an annual growth of **23%**.

Technavio

global corporate e-learning market size will be **\$243 billion** by 2026. With an annual growth rate of **14%**, the corporate market will be one of the fastest growing drivers of the e-learning industry.

Business Wire

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

Yet, it's here to stay.

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And CEOs want to see results!

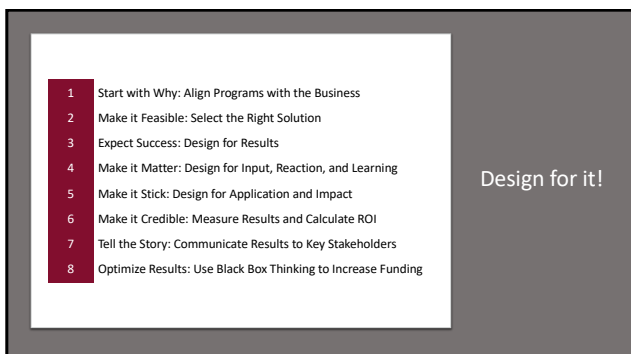
ROI Institute and ATD research show that the data CEOs receive are not demonstrating what they want out of their talent investment. (N=96)

Measures	Currently Measure	Should Measure	Importance
Inputs and Indicators	94%	86%	6
Efficiency	78%	82%	7
Reaction	53%	22%	8
Learning	32%	28%	5
Application	11%	61%	4
Impact	8%	96%	1
ROI	4%	74%	2
Awards	40%	44%	3

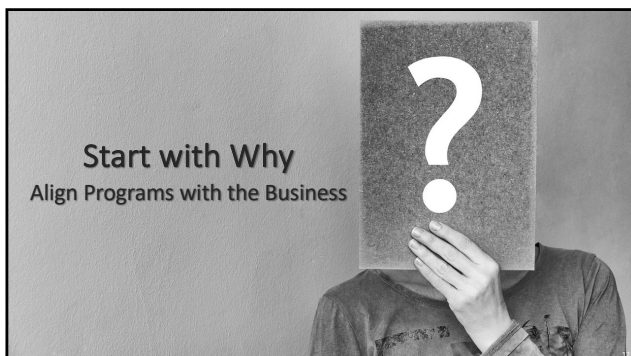
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Measures of Success		
Levels of Evaluation	Measurement Focus	Typical Measures
0. Inputs & Indicators	The input into the project in terms of scope, volume, efficiencies, costs	Participants, Hours, Costs, Timing
1. Reaction & Planned Action	Measures 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

Kirkpatrick 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 mapping it to practice in not only training, but the broader HR community and beyond.

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What is ROI?

$$BCR = \frac{\text{Project benefits}}{\text{Project costs}}$$
$$ROI = \frac{\text{Project benefits} - \text{Project costs}}{\text{Project costs}} \times 100$$



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ROI Calculation Example

$$BCR = \frac{\$71,760}{\$32,984}$$
$$ROI = \frac{\$71,760 - \$32,984}{\$32,984} \times 100$$

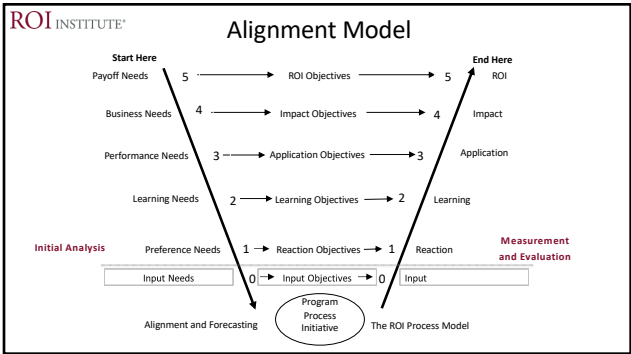


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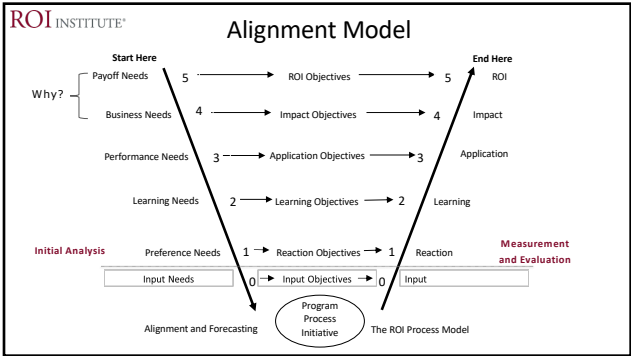
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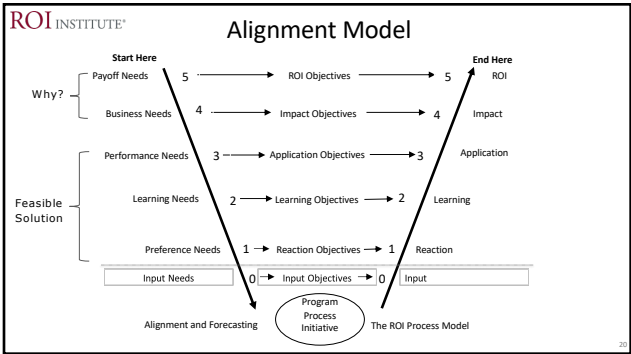
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Have a Discussion and Use Diagnostic Tools

Feasible solutions evolve through the understanding of context, empathizing with the target audience, and identifying performance gaps. The next step is to identify learning needs and how best to deliver relevant information. Forecasting outcomes based on inputs is sometimes helpful.

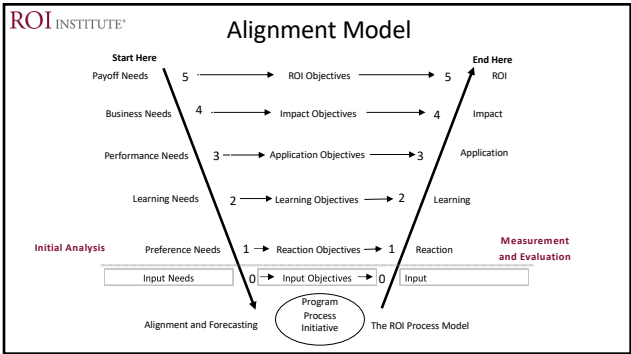
- Statistical process control
- Brainstorming
- Problem analysis
- Cause-and-effect diagram
- Force-field analysis
- Mind mapping
- Affinity diagrams
- Simulations

- Diagnostic instruments
- Focus groups
- Probing interviews
- Job satisfaction surveys
- Engagement surveys
- Exit interviews
- Exit surveys
- Nominal group technique

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Matching Evaluation Levels with Objectives	
The specific objectives of a virtual leadership program are as follows. After attending this program, participants should:	
1. Commit to make program successful.	Evaluation Level
2. Be able to identify and discuss various leadership models and theories.	
3. Serve as a positive role model for appropriate leadership behavior.	
4. Apply 8 out of 10 specific leadership skills every week.	
5. Deliver at least 20% return on the investment.	
6. Reduce turnover from an average annual rate of 25% to an industry average of 18% in one year.	
7. Reduce absenteeism from a weekly average of 5% to 3% in six months	
8. Improve quality 15% in six months.	
9. Increase productivity 12% in six months.	
10. Be able to select the appropriate leadership style for a particular situation.	
1 = Reaction 2 = Learning 3 = Application 4 = Impact 5 = ROI	

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Make it Matter

Design for Input, Reaction, and Learning

- Focus on objectives
- Think about ROI
- Make it relevant
- Make it important
- Make it action-oriented
- Capture attention and interest
- Create inclusiveness and collaboration
- Keep engagement levels high

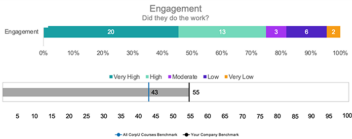


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Research supports the notion that

- Participants who are actively engaged with their cohort are more likely to complete the program, report higher levels of skill mastery, and declare a higher commitment to continued development
- The level of engagement maximizes the ROI of leadership development



Engagement
Did they do the work?

Engagement 20 15 5 5 2

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Very High High Moderate Low Very Low

5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100

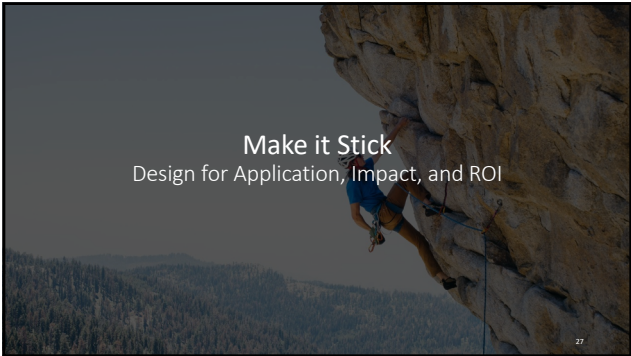
All Global Course Benchmark Your Company Benchmark

Source: Effective Leadership in a Hybrid World of Work. The Conference Board, 2022

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Make it Stick

Design for Application, Impact, and ROI



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Design Virtual Learning to Deliver Application, Impact, and ROI

Actions to Take Before the Program	Actions to Take During the Program	Actions to Take After the Program	Technology Enablers

Handout page 5. Think about a virtual learning program you are working on. One that is considered a significant investment for the organization. What actions can you take before, during, and after the program to design for application, impact, and ROI? What are a few technology enablers that will support the program?

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Making Leadership Skills Stick

Not all factors are equal in contributing to developing sustained behavior change through hybrid learning

- Factors most helpful with use of skills sixty-days post program
- Use of toolkits
- Manager conversations

As you apply the skills learned, how frequently do you: (n=42)

Factor	Never	Not often	Sometimes	Often	Always
Allocate resources	16.7%	35.7%	23.8%	23.8%	0%
Use the tool	0%	64.3%	23.8%	11.9%	0%
Use the tool often	0%	0%	35.7%	16.7%	47.6%
Use the tool all the time	0%	0%	0%	16.7%	83.3%
Use the tool all the time	0%	0%	0%	42.9%	57.1%
Use the tool all the time	0%	0%	0%	42.9%	57.1%
Use the tool all the time	0%	0%	0%	42.9%	57.1%
Use the tool all the time	0%	0%	0%	42.9%	57.1%
Use the tool all the time	0%	0%	0%	42.9%	57.1%
Use the tool all the time	0%	0%	0%	42.9%	57.1%

SOURCE: "Enhancing Leadership in a Hybrid World of Work," HR Conference World, December 2022

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Make it Credible

Measure Results and Calculate ROI

The ROI Methodology Process Model

PLAN THE EVALUATION

LEVEL 0: INPUT

Start with Why: Align Programs with the Business

Make it Feasible: Select the Right Solution

Expect Success: Plan for Results

COLLECT DATA

LEVEL 1: REACTION AND PLANNED ACTION

Make it Matter: Design for Good Reaction and Learning

Make it Stick: Design for Application and Impact

LEVEL 2: LEARNING

LEVEL 3: IMPACT

ANALYZE DATA

Make it Credible: Quantify the Effects of the Program

Make it Credible: Convert Data to Monetary Value

Make it Credible: Capture Costs of Program

Make it Credible: Calculate ROI

Make it Credible: Identify Intangible Measures

LEVEL 4: ROI

INTANGIBLE BENEFITS

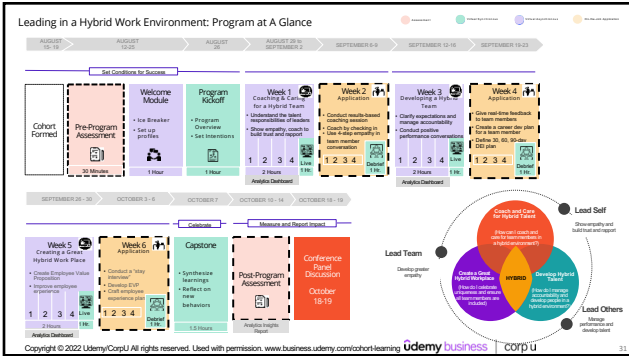
OPTIMIZE RESULTS

Tell the Story: Communicate Results to Key Stakeholders

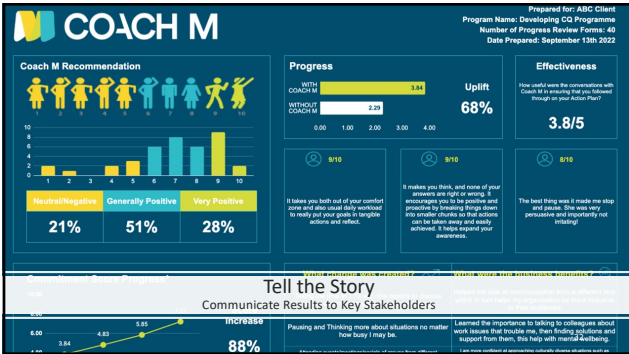
Customer Results: Measure the Return to Investment

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It's about process improvement.

THE CONFERENCE BOARD

Effective Leadership in a Hybrid World of Work



- Consider leaders' workload as it can delay engagement in the program.
- Find ways to use the discussion board more effectively.
- Give participants an opportunity to network and collaborate on projects.
- Incorporate smaller group and cohort-based interaction.
- Offer more variety in how the material is delivered – hear other voices.
- Engage participant supervising managers earlier in the process to get their supports.

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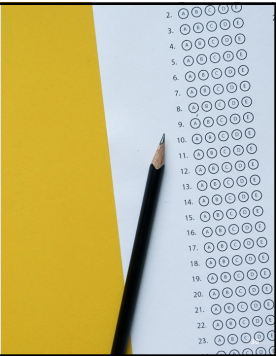
Design Virtual Learning to Deliver Application, Impact, and ROI

Actions to Take Before the Program	Actions to Take During the Program	Actions to Take After the Program	Technology Enablers
Align the Solution to the Business	Include WIPPI at the Start	Follow-up on Application, Impact, and ROI	Leverage Chatbots for Learning Transfer
Determine What Needs to Change	Select Activities for Maximum Involvement	Engage in One-on-One Coaching	Use Coaching Videos
Select the Right Solution	Include Self-Reflection Time	Host a Lessons-Learned Meeting	Use Automated Reminder and Nudges
Develop and Communicate Specific, Measurable Objectives	Teach to Application and Impact	Share Success with Other Participants	Use Social Media to Encourage and Support
Create Custom Self-objectives	Connect Content Between Sessions	Apply Learning to Meaningful Business Projects with Lessons-Learned Graduation	Record Content for Post-Program Review and Tips
Ensure Easy Access to Application and Impact Data	Collect Data Along the Way	Offer Group Coaching or Mastermind Groups for Continued Progress	Use AI to Nudge Managers to Coach Participants toward Performance

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When identifying techniques, consider the following:

- Cost
- Technology required
- Effectiveness
- Participant time
- Manager involvement
- Time of others
- Proven approach
- Ease of implementation
- Ease of use
- Innovation



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How do you design virtual learning for application, impact, and ROI?

✓ Start with Why: Align Programs with the Business

✓ Make it Feasible: Select the Right Solution

✓ Expect Success: Design for Results

✓ Make it Matter: Design for Input, Reaction, and Learning

✓ Make it Stick: Design for Application and Impact

✓ Make it Credible: Measure Results and Calculate ROI

✓ Tell the Story: Communicate Results to Key Stakeholders

✓ Optimize Results: Use Black Box Thinking to Increase Funding

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Scan the QR code to [access resources](#) from today's session.



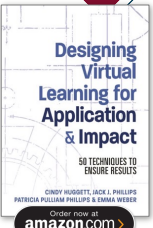
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ROI INSTITUTE®

Virtual learning is here to stay—and it must add value to an organization, otherwise it's a waste of time and resources.

Get serious about delivering business impact with your virtual learning programs. [This book](#) will show you how.





Order now at 

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ROI INSTITUTE™

Need an ROI study on an important program or project?

ROI Certification is the Solution!

By attending ROI Certification, you will:

- Build serious measurement and evaluation capability.
- Maximize learning through weekly group coaching with ROI Institute leaders.
- Complete an ROI evaluation study on an important program.
- Earn the Certified ROI Professional® (CRP) designation and digital badge.
- Join the ROI Network with more than 6,000 ROI professionals.
- Advance your professional skills and improve organization outcomes.

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ROI Learning Center

Hosted by Training Magazine Network

Created by ROI Institute, Inc.

Four realities occur in today's learning and development environment, globally.

1. Most top executives want learning and development to be aligned with the business.
2. The concept of ROI is familiar to most people.
3. Connecting learning and development to the business is not that difficult.
4. Thousands of L&D professionals are routinely doing this.

The ROI Learning Center provides tools, templates, and case studies to help prepare you for success in today's environment. Our goal is to take the mystery out of the ROI process.

Start at Level 1 and explore each level at your own pace. Each of the five levels will bring you closer to calculating the ROI of your program or project. There is also a calculator to help you calculate ROI when you have the appropriate data.

ROI INSTITUTE™

Level 1 Reaction

Level 2 Learning

Level 3 Application

Level 4 Impact

Level 5 ROI

ROI Calculator

Patti Phillips, Ph.D.

Jack Phillips, Ph.D.

CEO

Chairman

ROI Institute

ROI Institute

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PLANNING

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- Board Member, International Federation of Training and Development
- Advisory Council Member, The Conference Board Human Capital Practice
- Board Member, International Society of Performance Improvement
- Fellow, ATD Certified Professional in Talent Development
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