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

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

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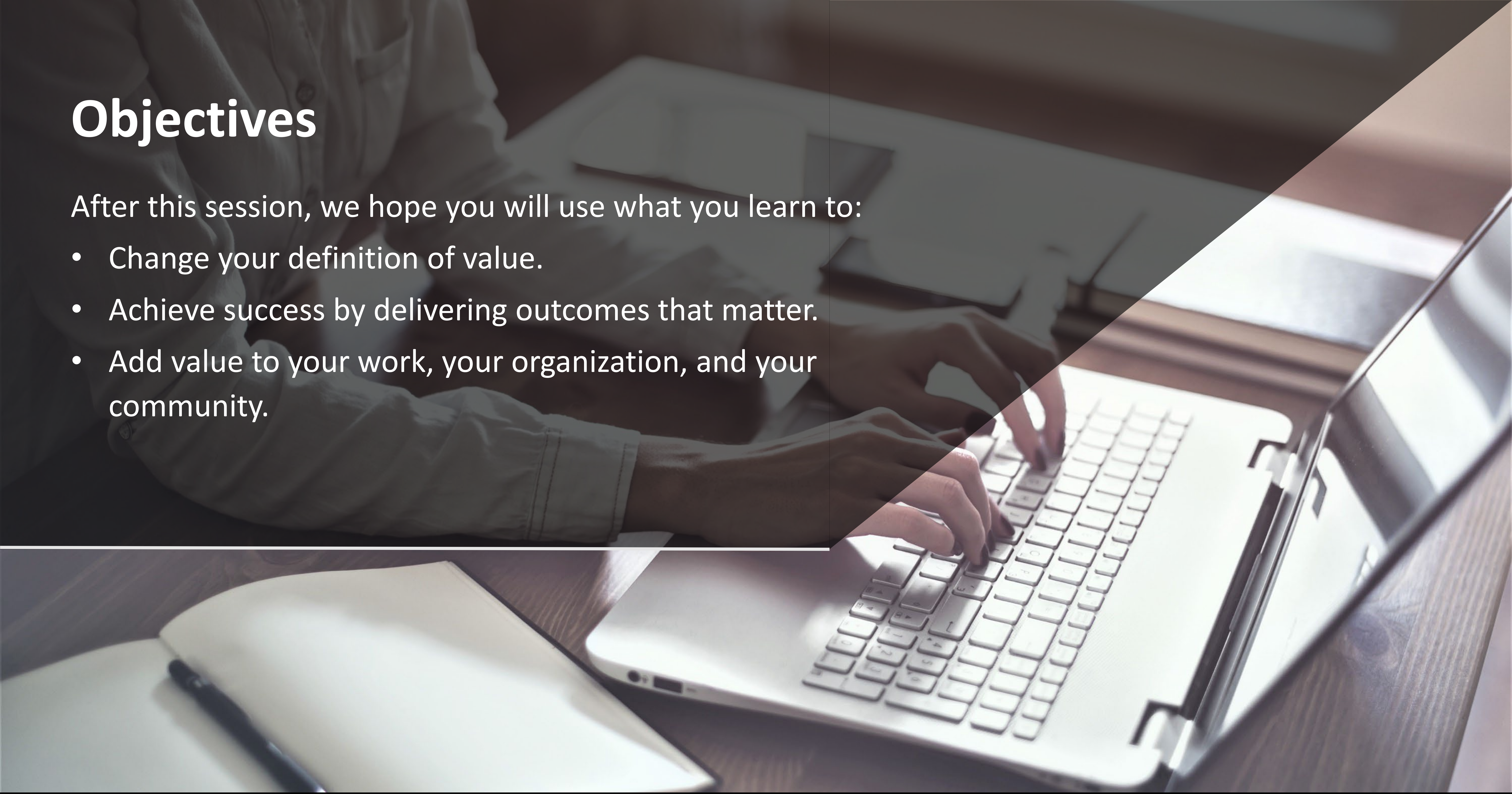
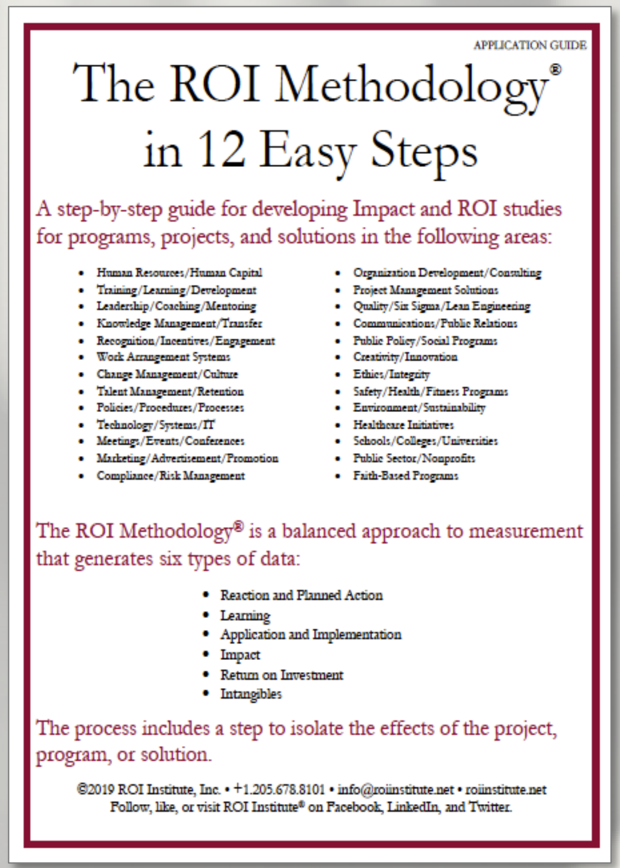
# Objectives

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

- Change your definition of value.
- Achieve success by delivering outcomes that matter.
- Add value to your work, your organization, and your community.



# Resources



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:

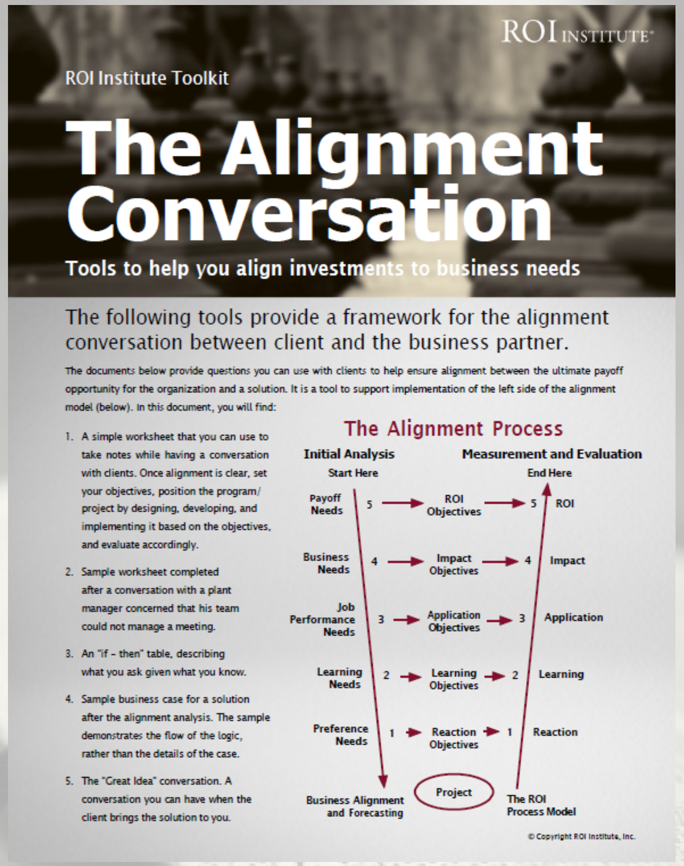
- Human Resources/Human Capital
- Training/Learning/Development
- Leadership/Coaching/Mentoring
- Knowledge Management/Transfer
- Recognition/Incentives/Engagement
- Work Arrangement Systems
- Change Management/Culture
- Talent Management/Retention
- Policies/Procedures/Processes
- Technology/Systems/IT
- 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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ROI Institute Toolkit

The Alignment Conversation

Tools to help you align investments to business needs

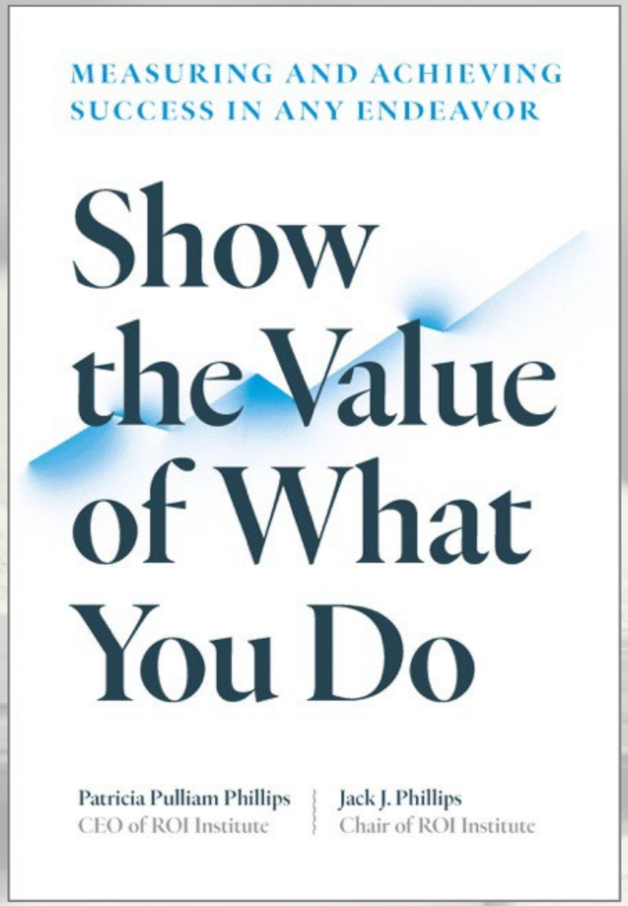
The following tools provide a framework for the alignment conversation between client and the business partner.

The documents below provide questions you can use with clients to help ensure alignment between the ultimate payoff opportunity 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 simple 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.





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# Global Communications

**CEO**: Sydney Mitchell
**GlobalCom University President**: 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 value are we gaining from our investment in GlobalCom University?*

## Global Communications

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

*What value are we gaining 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.

# How do you define value of the work you do?

# 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 |



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.

# What is ROI?

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

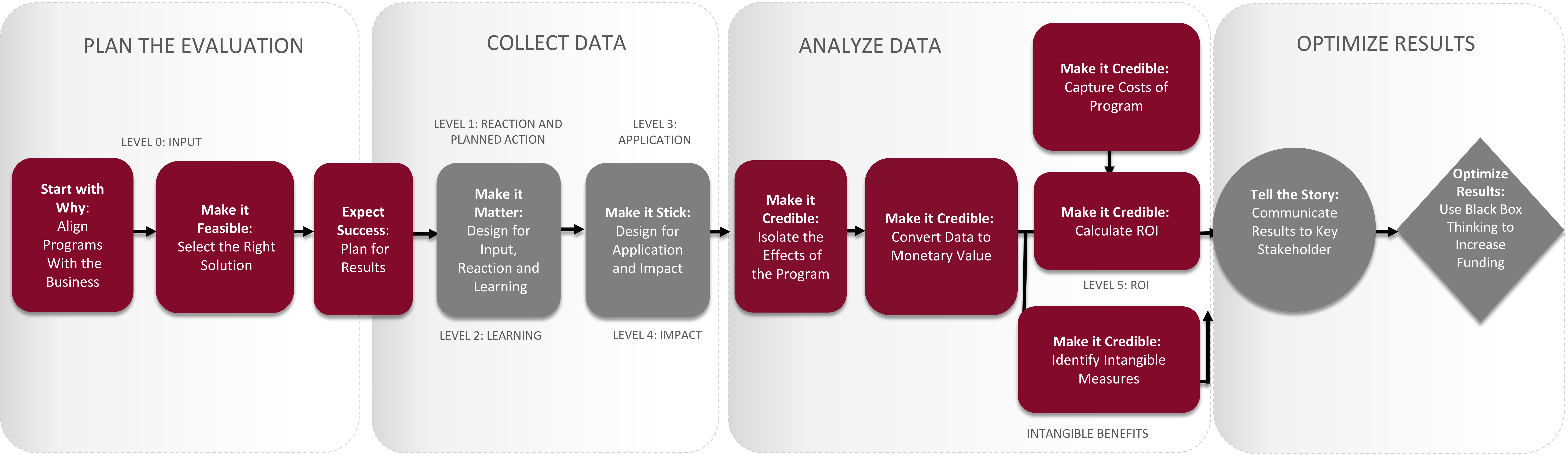
$$\text{ROI} = \frac{\text{Program Benefits} - \text{Program Costs}}{\text{Program Costs}} \times 100$$

# What is ROI?

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

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

# The ROI Methodology Process Model



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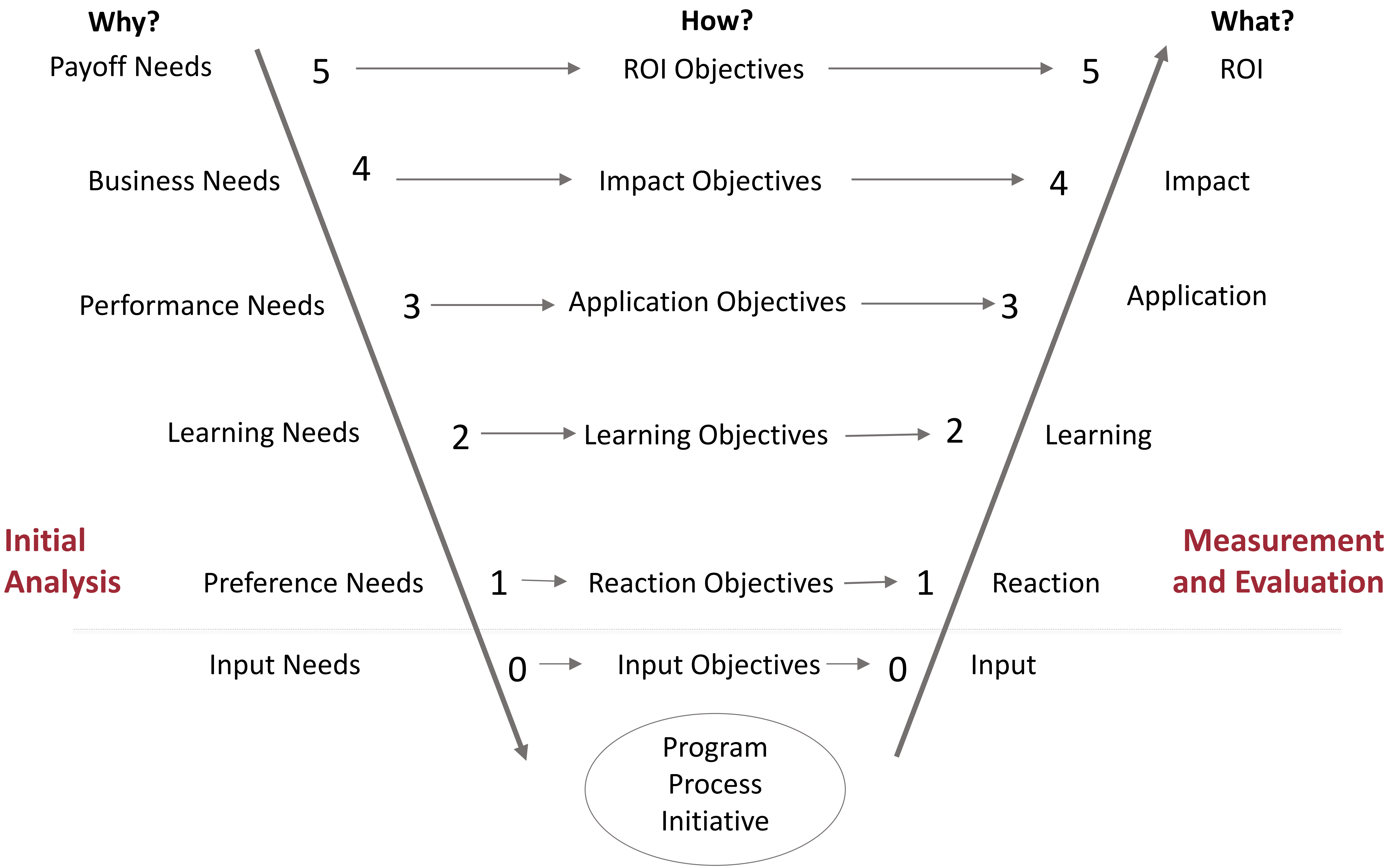
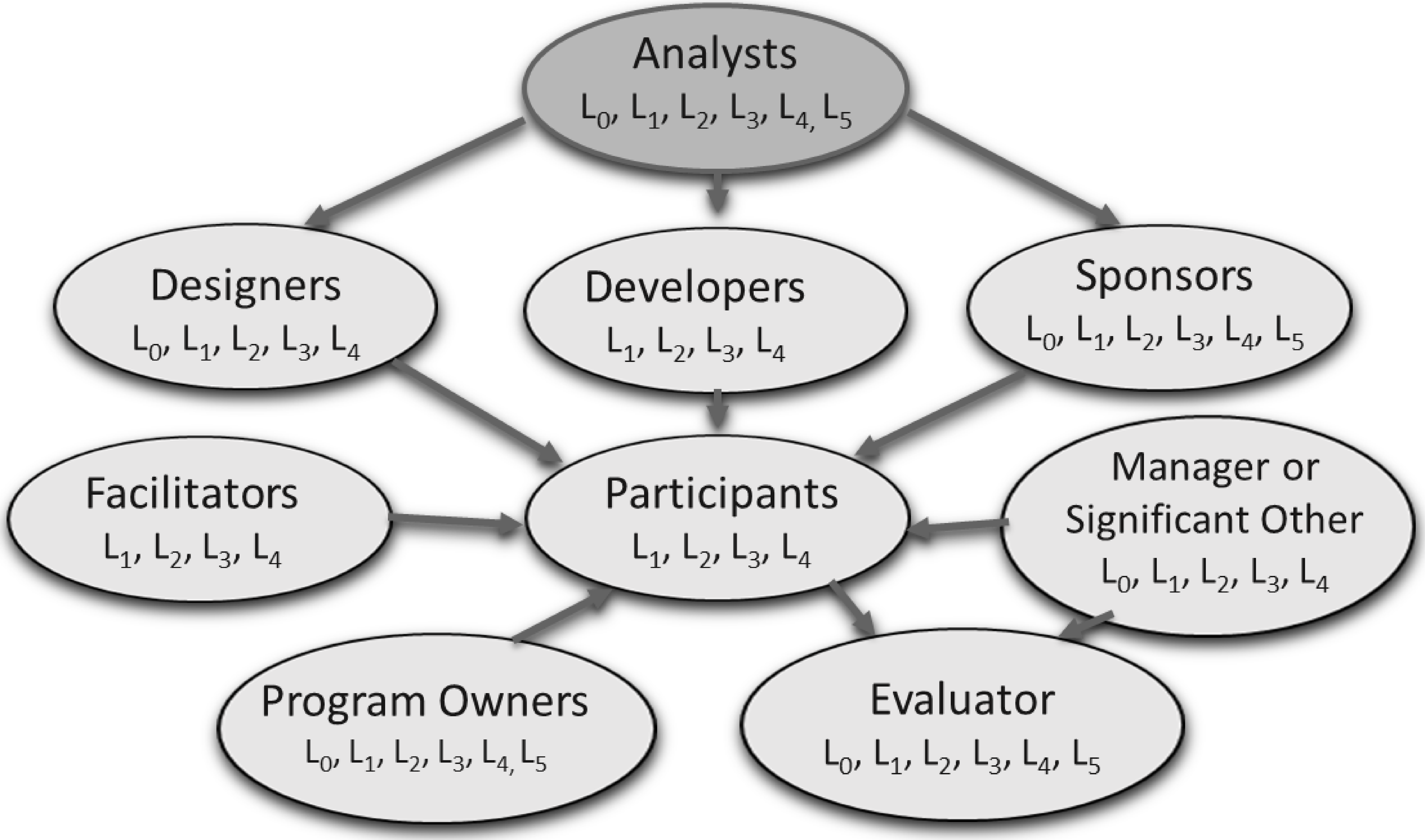
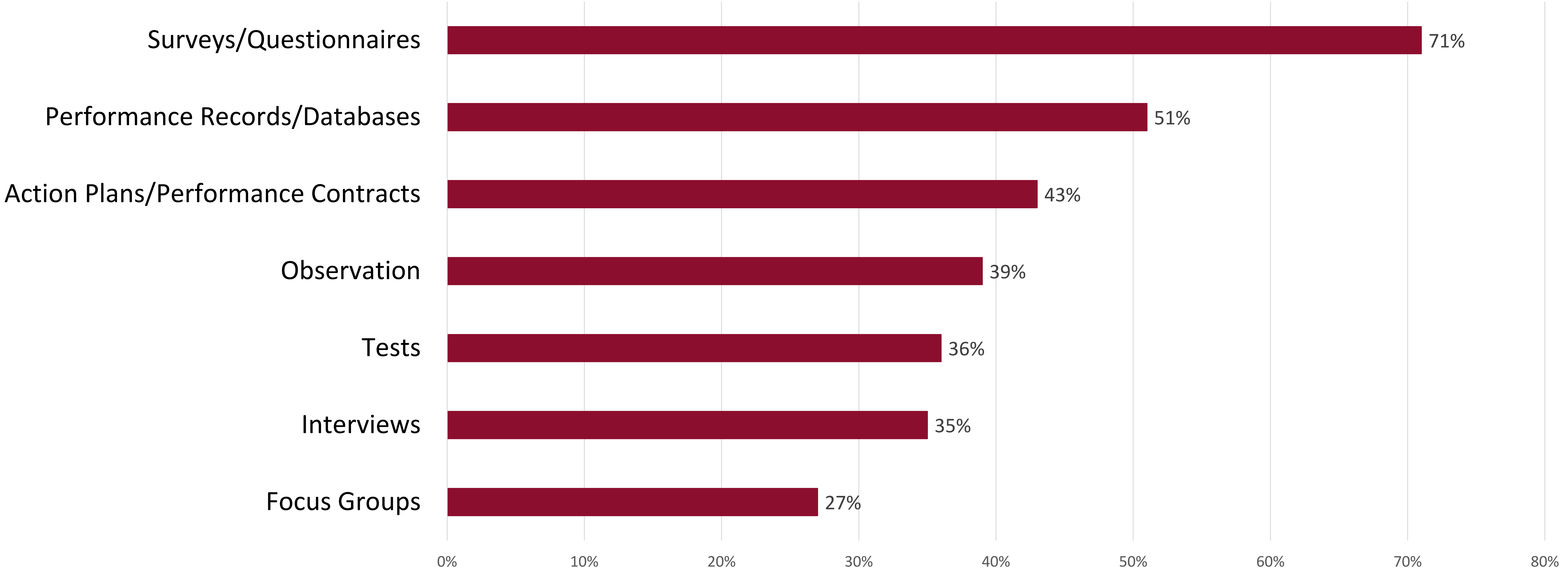
# Alignment Model



# Objectives define expectations.






*Survey of Users, N = 246

# Data Collection Methods

# 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 Live
2 Hours · 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 Live
2 Hours · 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 Live
2 Hours · 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

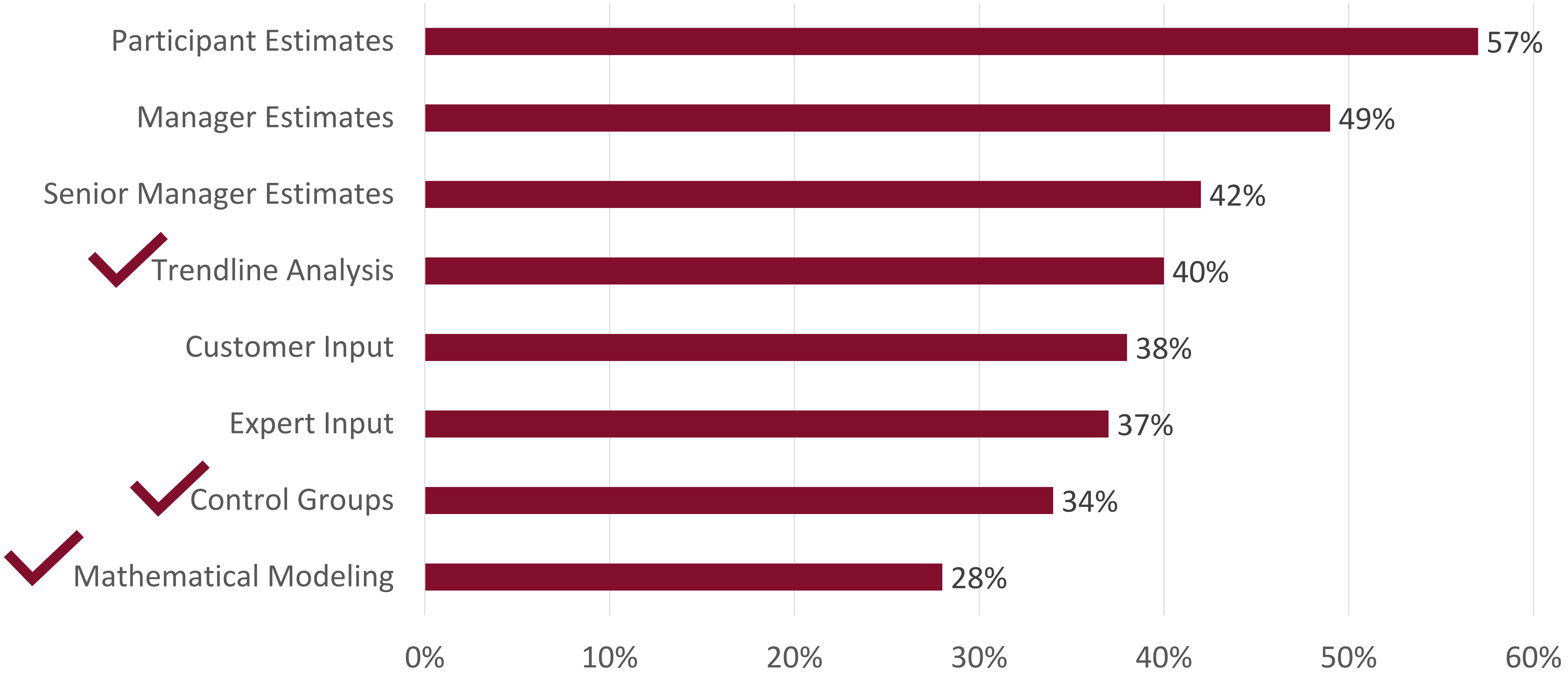
**Post-Program Assessment**
Analytics Insights Report

**Conference Panel Discussion**
October 18-19

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



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

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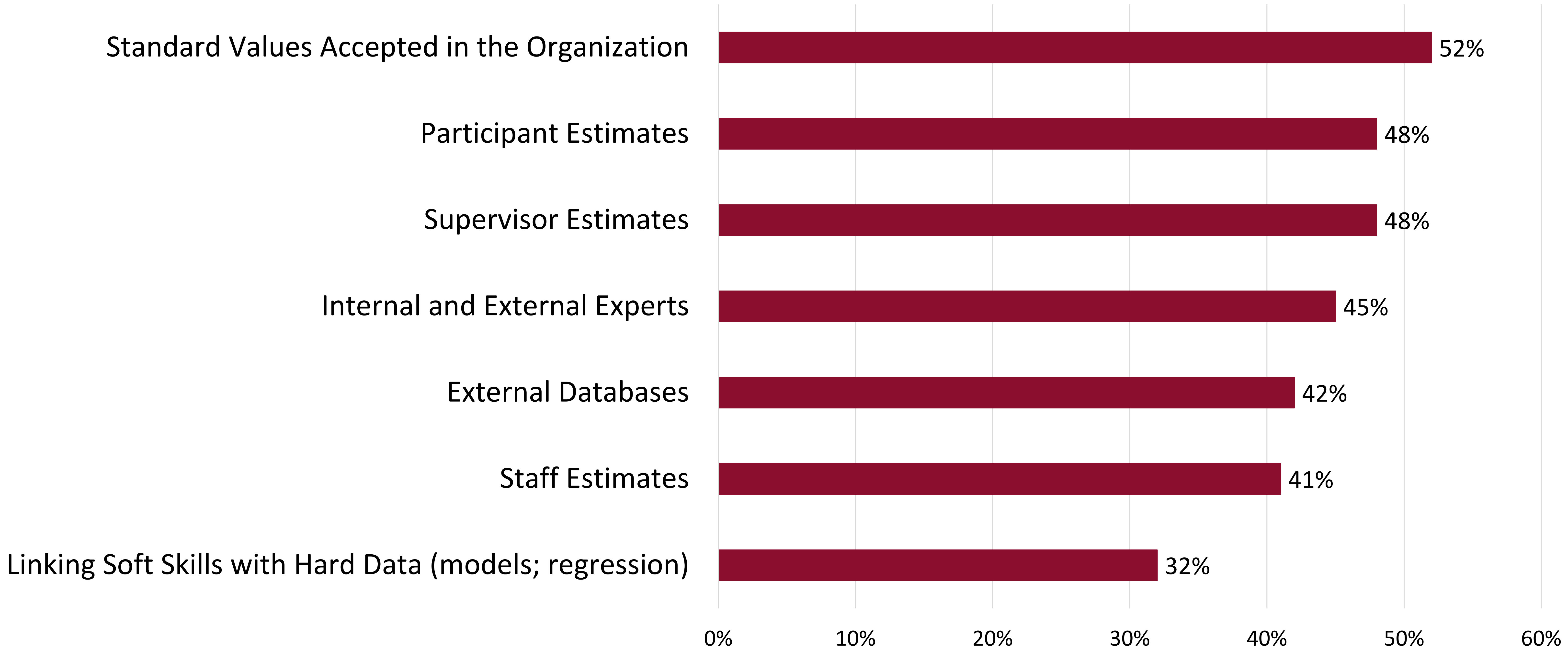
# Isolate Program Effects

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# Convert Impact Measures to Money

# Account for 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

# 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.

# Healthcare Inc.

**Data Collection Techniques**

- (L1) Questionnaire – end of program
- (L2) Knowledge Assessment; Skill Practice – during program
- (L3) Self Assessment Questionnaire – 6 months after program
- (L3) Employee Survey (25% Sample) – 6 months after program
- (L4) Complaint and Turnover Records – 12 months after program

**Isolation Techniques**

- Complaints – Trend Line Analysis
- Turnover – Forecasting

**Data Conversion Techniques**

- Complaints – Historical costs and input from experts (internal EEO/AA staff)
- Turnover – External studies within industry

**Program Costs**

- Fully loaded including needs assessment, development, coordination, salaries and benefits of initial meeting, and evaluation
- Total Costs: $277,987

**Benefits (Isolated)**

- **Complaints**
  - Value of one complaint: $24,343
  - Prevented over one year: 14.8
- **Turnover**
  - Value of one turnover statistic: $20,887
  - Prevented over one year: 136

# What is ROI?

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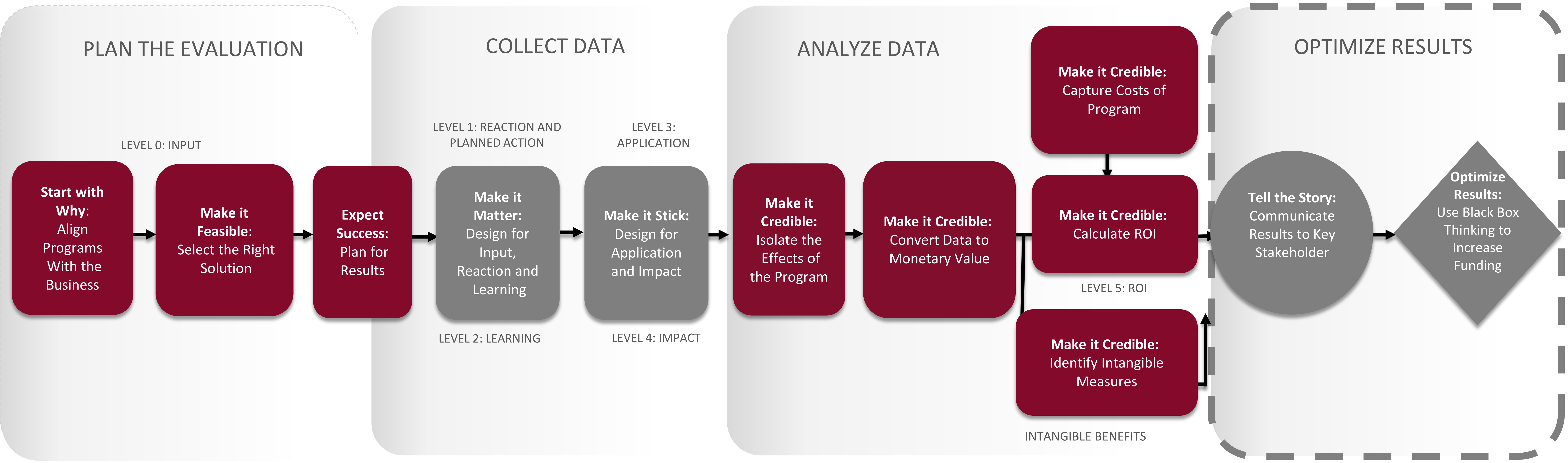




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With more than 20 years of experience in the learning & development industry, **Kaycee Buckley is Director for Global Commerical Talent.** She works with organizational leaders to define talent development, strategies, develop and deploy learning events, and measure the business impact for these training initiatives.

*Just wanted to let you know that I presented the Coaching ROI results to my DVP and the Area Commercial Directors last Thursday. It was AMAZING! They were surprised and not surprised by the results. That is,* ***they were not surprised that the ROI was negative*** *because they are all aware that the Sales Managers are not coaching and agreed with the barriers as I had outlined in the study.* ***They were surprised at what a negative impact "not applying Coaching" was making to the business, which sparked a very productive conversation as to what to do to fix it.***

***Wow...such positive outcomes from my stakeholders...and with a negative ROI!***

# Tell your story. Optimize results.

# 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.

- **Inexpensive solutions can lead to high ROIs. Negative ROIs can lead to positive outcomes.**
  Tell your story, use the results.

**Remember, when it comes to showing value:**

- Hope is not a strategy.
- Luck is not a factor.
- Doing nothing is not an option.

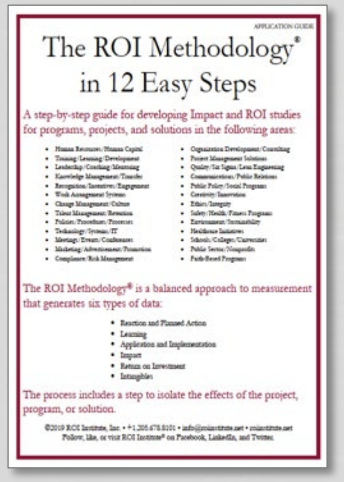
**Change is inevitable.**

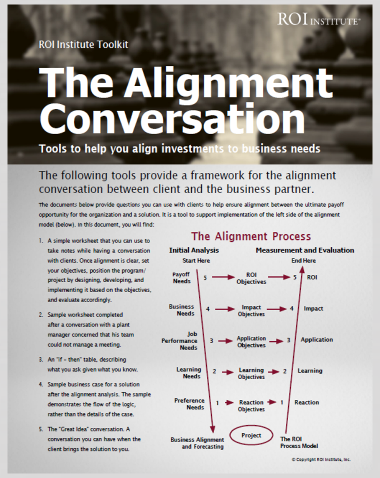
**Progress is optional.**

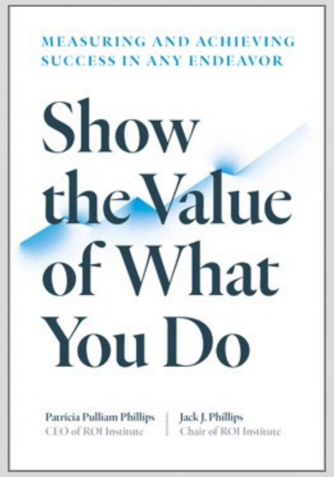
# Resources

Scan the QR Code to Access Today's Session Resources

SCAN ME





# Questions?

patti@roiinstitute.net

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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.

SCAN ME

**https://roiinstitute.net/roicertification/**

# Patti P. Phillips, Ph.D.

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

**Author of these books and more.**