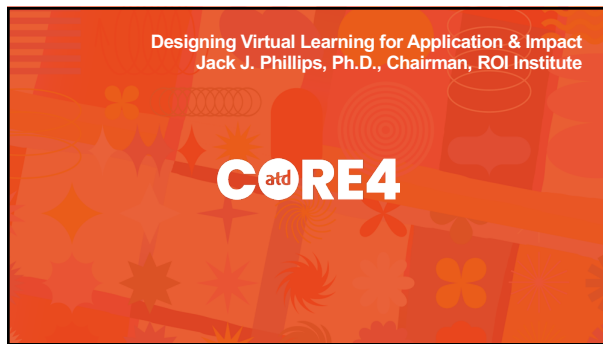
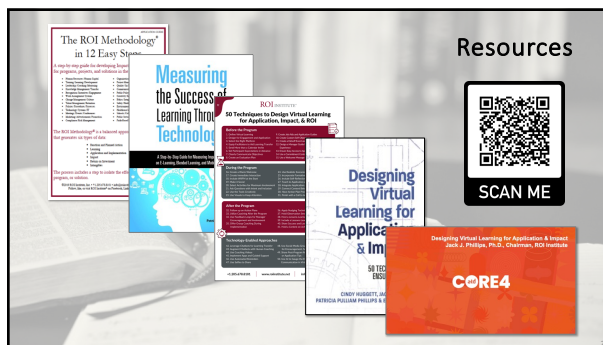


ATD Core4 Virtual conference

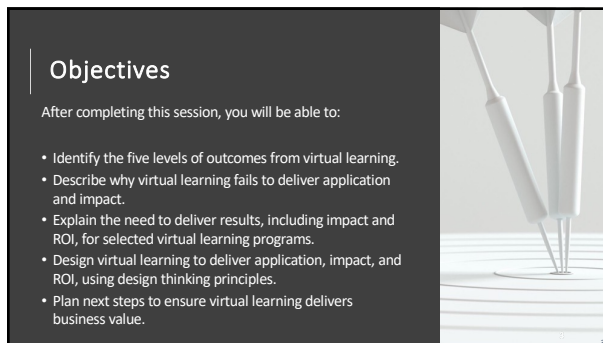
45-minute live presentation



1



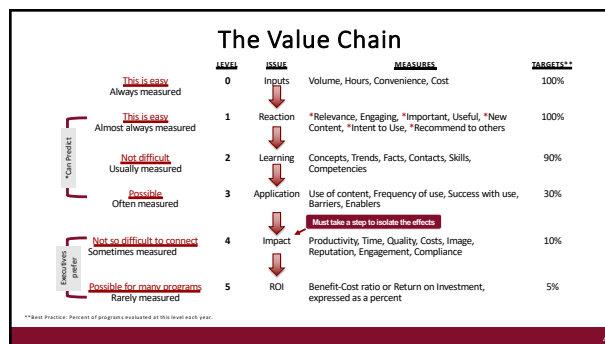
2



3

ATD Core4 Virtual conference

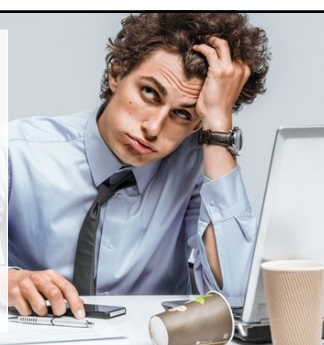
45-minute live presentation



4

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.



5

Senior leaders want impact and ROI.

Sixty-seven percent of CEOs say they get at least a basic set of human capital metrics—but **only 24% of survey respondents** said HR also provides analytics that connect their people metrics to business metrics.

Really, the question isn't about relevance of the (HR) function or a 'seat at the table;' rather, it is **what impact has HR made on the business.**

Seventy-four percent of CEOs report that they want ROI, but only 4% get it. Ninety-six percent of CEOs want impact; only 8% receive it now. **Business impact data and ROI are the most important metrics** in their decision making about the learning investment.



6

[illegible]

ATD Core4 Virtual conference

45-minute live presentation

Characteristics of Investments Suitable for Impact & ROI

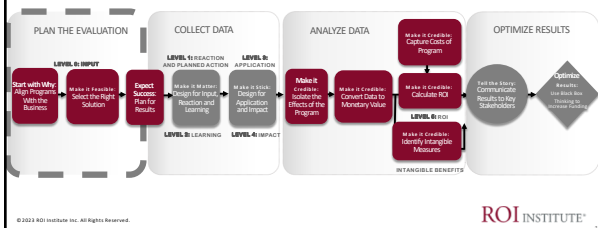
- Linkage of project to operational goals and issues
- Importance of project to strategic objectives
- Top executive interest in the evaluation
- Cost of the project
- Visibility of the project
- Size of target audience
- Investment of time required

10

10

The ROI Methodology Process Model

Designing for the Delivery of Business Results



11

Guiding Principles

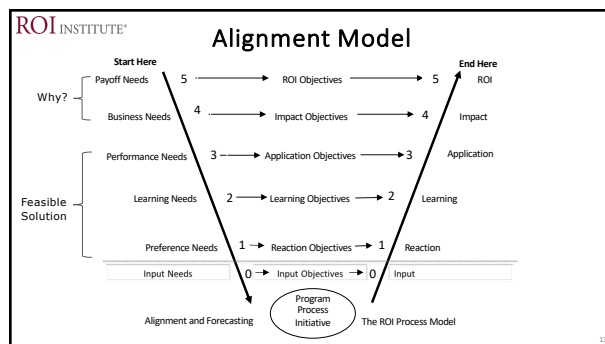
1. When conducting a higher-level evaluation, collect data at lower levels.
2. When planning a higher-level evaluation, the previous level of evaluation is not required to be comprehensive.
3. When collecting and analyzing data, use only the most credible sources.
4. When analyzing data, select the most 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.

12

12

ATD Core4 Virtual conference

45-minute live presentation

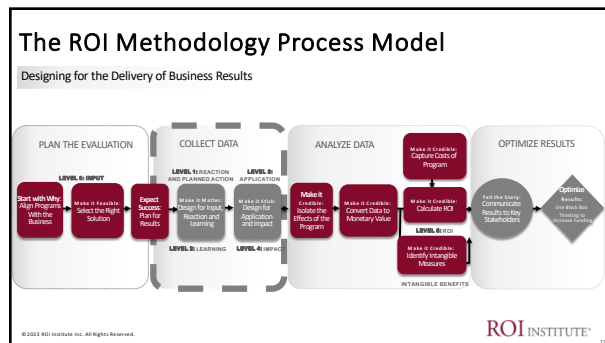


13

Developing Objectives for Each Level

Levels	Focus
Level 1, Reaction	Defines specific measures of expected reaction to the program as it is revealed and communicated to the stakeholders
Level 2, Learning	Defines specific measures of improvement in knowledge, information, contacts, and skills as the participants and other stakeholders learn how to make the program successful
Level 3, Application	Defines specific measures of actions taken that define success with application and implementation of program
Level 4, Impact	Defines the specific impact measures that will change or improve as a consequence of the program's implementation
Level 5, ROI	Defines the minimum return on investment from the program, comparing program costs with monetary benefits from the program

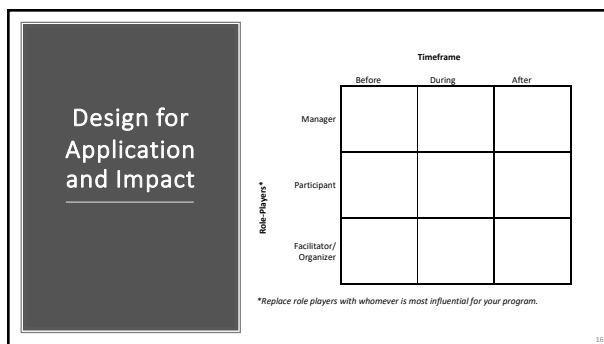
14



15

ATD Core4 Virtual conference

45-minute live presentation



16

Key Actions BEFORE the Program

- Develop application objectives for participants.
- Have participants develop customized impact objectives.
- Use performance contracts for application and impact.
- Create an application guide to enable and support the application.
- Create a job aid to use in the application.
- Have manager create expectations before the program.



17

Key Actions DURING the Program

- Use action plans to detail application steps.
- Have action plans presented to the group to increase commitment.
- Teach to application and impact.
- Review Level 3 and Level 4 follow-up questionnaire in the last learning module.



18

ATD Core4 Virtual conference

45-minute live presentation

Key Technology-Enabled Actions

- Create coaching videos to use at appropriate times.
- Use apps to encourage and enable the use of content.
- Use social media groups to network for encouragement, support, and enablement.
- Post-recorded content reviews.
- Use automated reminders for application and impact.



19

Actions AFTER the Program

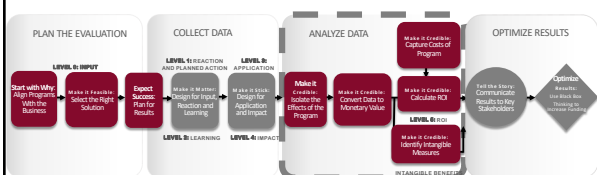
- Organize a group coaching session after the program.
- Collect action plans in a follow-up period.
- Organize follow-up sessions to share results.
- Use an on-the-job trainer to support the application.
- Provide encouragement from the manager after the program.
- Host a lessons-learned meeting after participants have used the content.
- Share successes with other participants.



20

The ROI Methodology Process Model

Designing for the Delivery of Business Results



© 2023 ROI Institute Inc. All Rights Reserved.

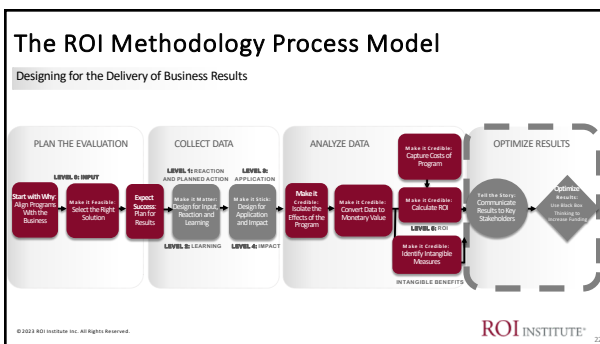
ROI INSTITUTE®

21

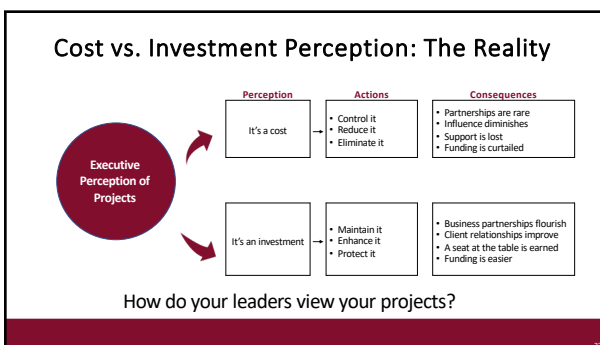
21

ATD Core4 Virtual conference

45-minute live presentation



22



23



24

ATD Core4 Virtual conference

45-minute live presentation



Be Proactive

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.**

25

25



SCAN ME

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

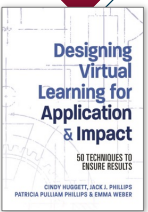
26

26

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.



Use code **ROICore4** to order your copy at special discounted price.

<https://roiinstitute.net/product/designing-virtual-learning-for-application-impact/>

27

27

ATD Core4 Virtual conference 45-minute live presentation



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.

<https://roiinstitute.net/roicertification/>

ATD Members Receive 20% Discount Use code ROIATD10

SCAN ME

CEA ACCREDITED PROVIDER

28



Questions?

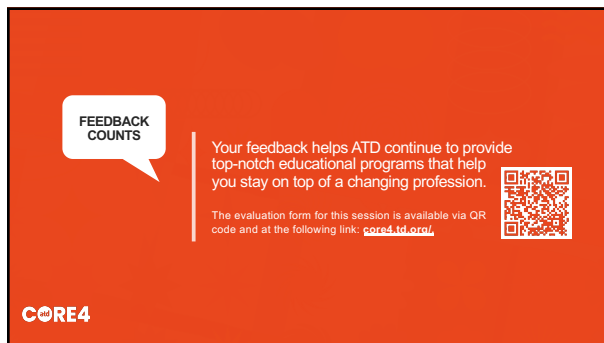
Visit us Online
www.roiinstitute.net

Email Us
Jack@roiinstitute.net

Connect with Us

[in](#) [f](#) [t](#)

29



FEEDBACK COUNTS

Your feedback helps ATD continue to provide top-notch educational programs that help you stay on top of a changing profession.

The evaluation form for this session is available via QR code and at the following link: core4.id.oral/

CORE4

30

ATD Core4 Virtual conference

45-minute live presentation

Transoft: Start with Why	
Payoff Opportunity	- Potential increase in revenue from ProfitPro \$1,000 to \$3,000 per upgrade for 12,000+ users - Maintain competitive advantage
Business Needs	Upgrade sales to existing customers
Performance Needs	- Demonstrate new features - Describe business case for upgrading - Demonstrate how upgrades will lead to greater profitability - Implementation and support
Learning Needs	- Rationale for upgrade - Key features - Upgrade contribution to client profitability
Preference Needs	- Flexible solution - Accessible to 200 sales reps across US - Avoid cost of travel and time off job

31

Virtual Learning Solution	- Five modules - Target first 25 Sales Representatives taking the program - Content was relevant - Five quiz questions per module - Immediate use of skills expected - Routine use of each major skill within one month - Sales should occur within three weeks - Associates should reach \$10,000 in sales per month - Objectives set for all five levels - Target ROI: 20%
---------------------------	--

32



33

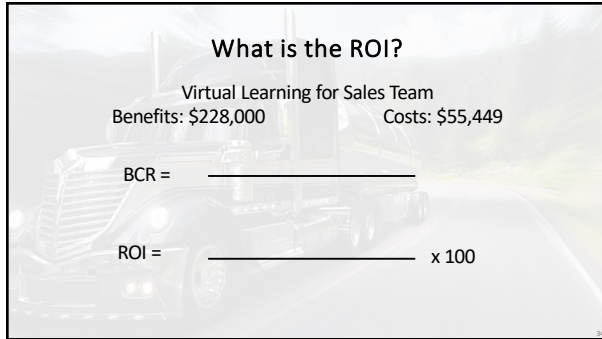
ATD Core4 Virtual conference
45-minute live presentation

What is the ROI?

Virtual Learning for Sales Team
Benefits: \$228,000 Costs: \$55,449

BCR = _____

ROI = _____ x 100

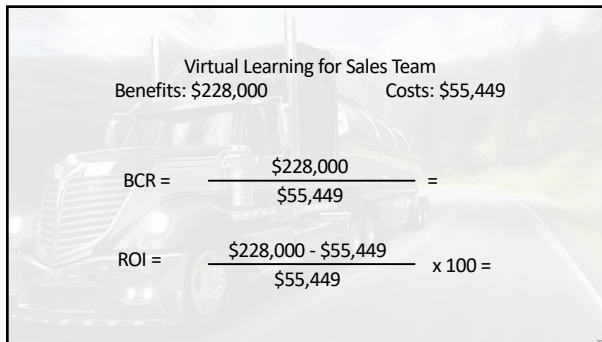


34

Virtual Learning for Sales Team
Benefits: \$228,000 Costs: \$55,449

BCR = $\frac{\$228,000}{\$55,449}$ = _____

ROI = $\frac{\$228,000 - \$55,449}{\$55,449}$ x 100 = _____

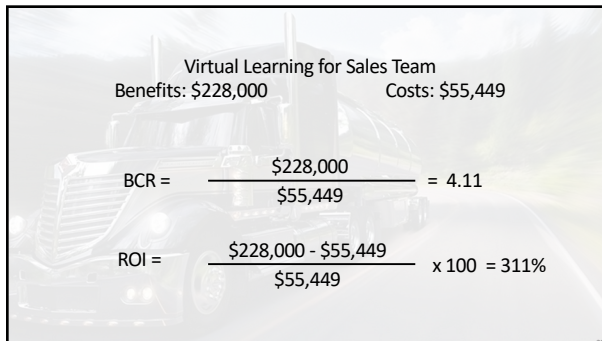


35

Virtual Learning for Sales Team
Benefits: \$228,000 Costs: \$55,449

BCR = $\frac{\$228,000}{\$55,449}$ = 4.11

ROI = $\frac{\$228,000 - \$55,449}{\$55,449}$ x 100 = 311%



36
