



COGNOTA

ROI INSTITUTE®

Spectrum
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Welcome!

LearnOps: The ROI Advantage over Project Management Tools

Wednesday December 6, 2023 @ 1:00 pm EST



Ryan Austin
CEO, Cognota



Patti Phillips
CEO, ROI Institute



LaMont Boykins
VP Learning & Dev.
Spectrum



Introductions



Ryan Austin

Founder & CEO



Sarah Bain

Director of Product Strategy



Patti Phillips

CEO



LaMont Boykins

VP Learning & Development



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Agenda

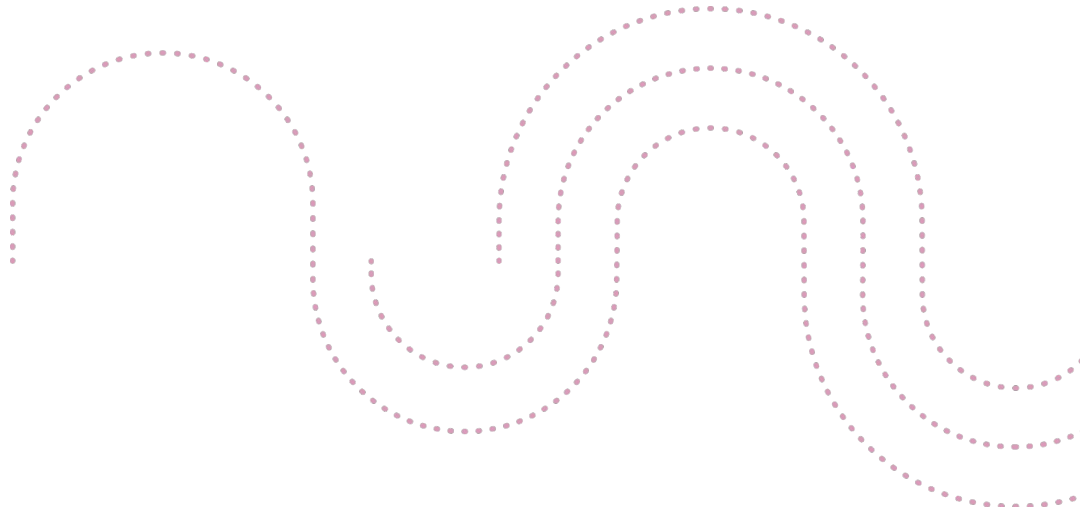
The ROI Advantage

1. **What** is ROI?
2. **Importance** of Learning Impact and ROI
3. **What** is LearnOps?
4. **Importance** of Learning Operations
5. **Partnership** between ROI Institute & Cognota
6. **Benefits** of Streamlining LearnOps and ROI





What is **ROI** in the Context of Learning & Dev?



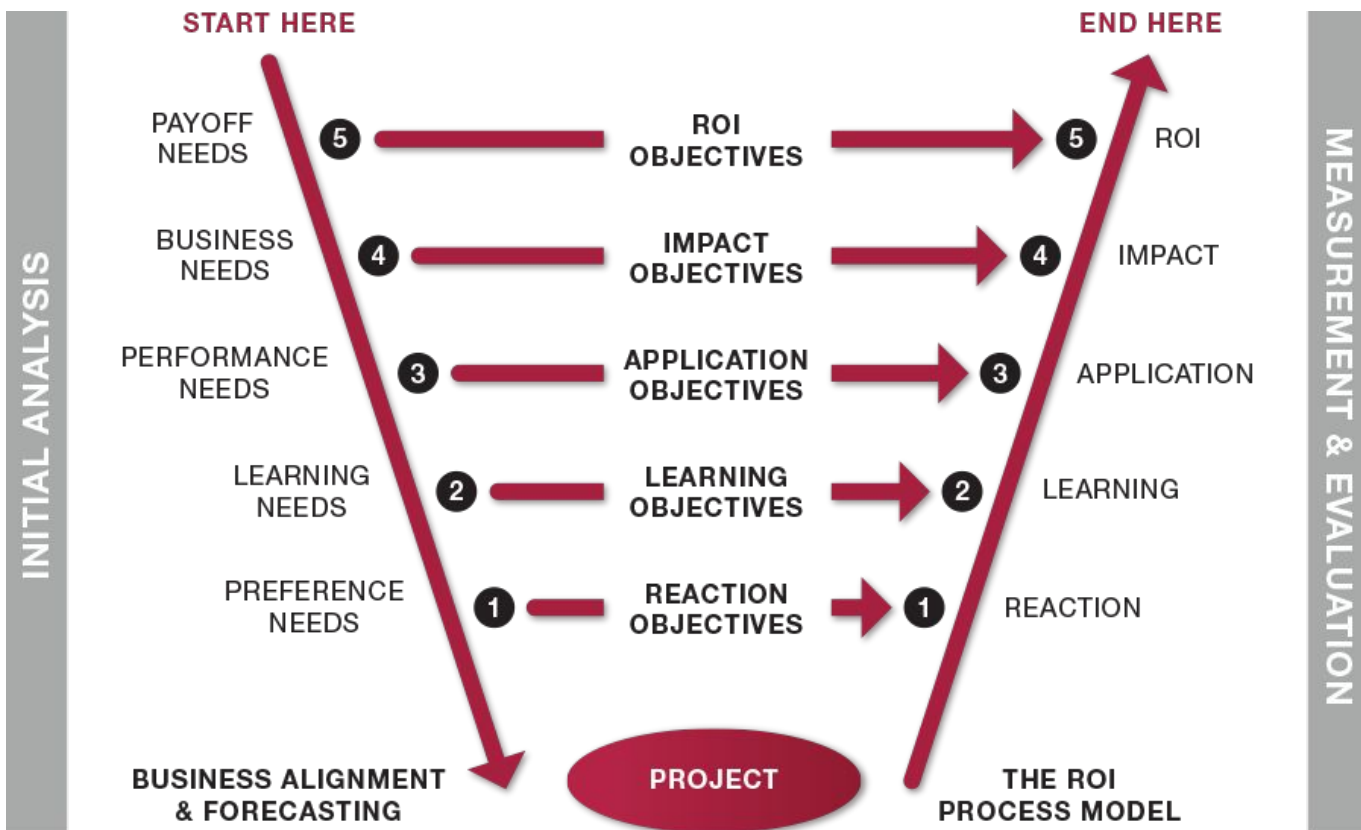
Framework to Measure ROI in L&D

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

@Copyright 1983-2023. The five-level evaluation framework is a copyright of ROI Institute, Inc. All rights reserved.

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.

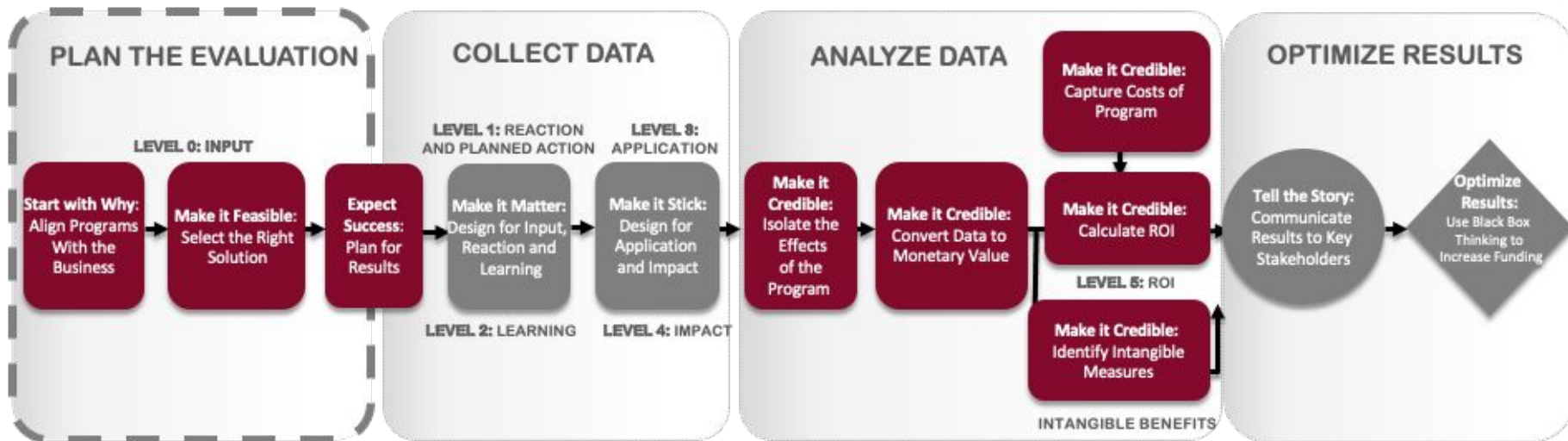
The Alignment Conversation





The ROI Methodology®

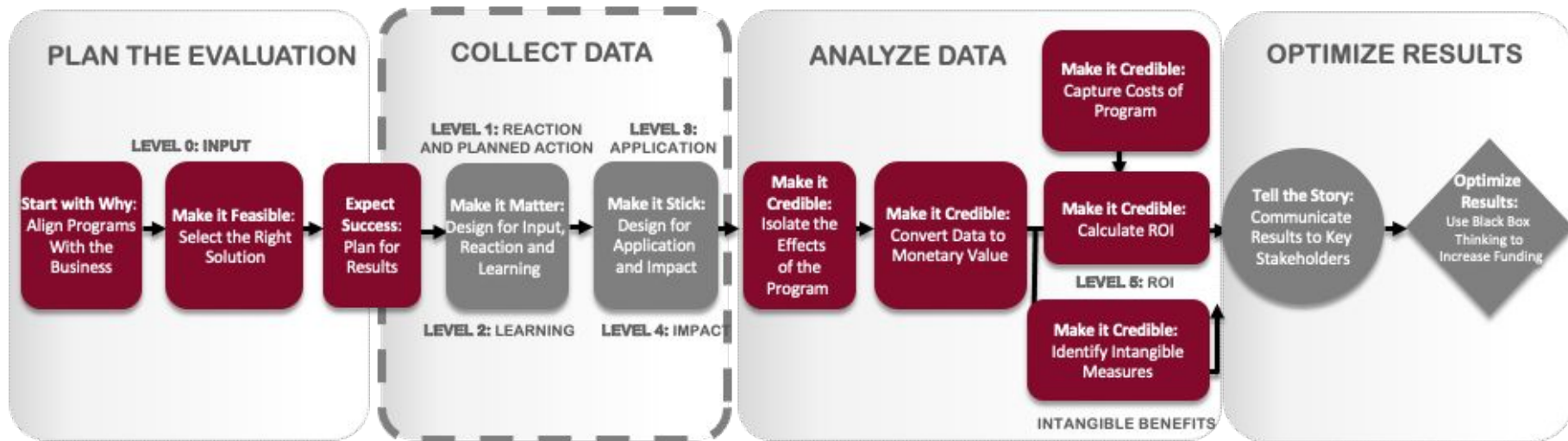
Designing for the Delivery of Business Results





The ROI Methodology[®]

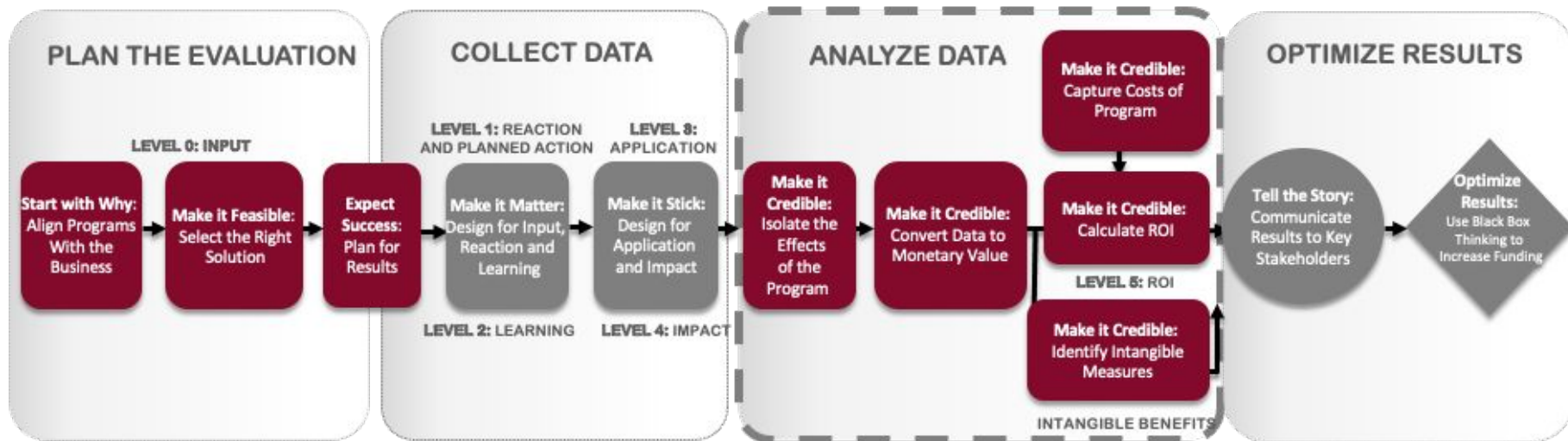
Designing for the Delivery of Business Results





The ROI Methodology®

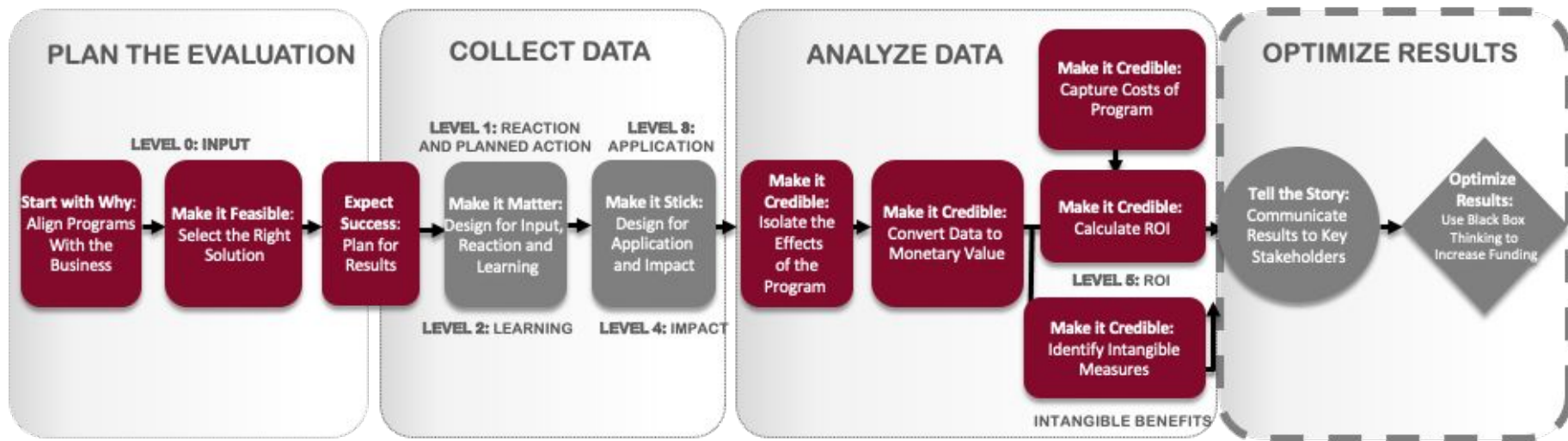
Designing for the Delivery of Business Results





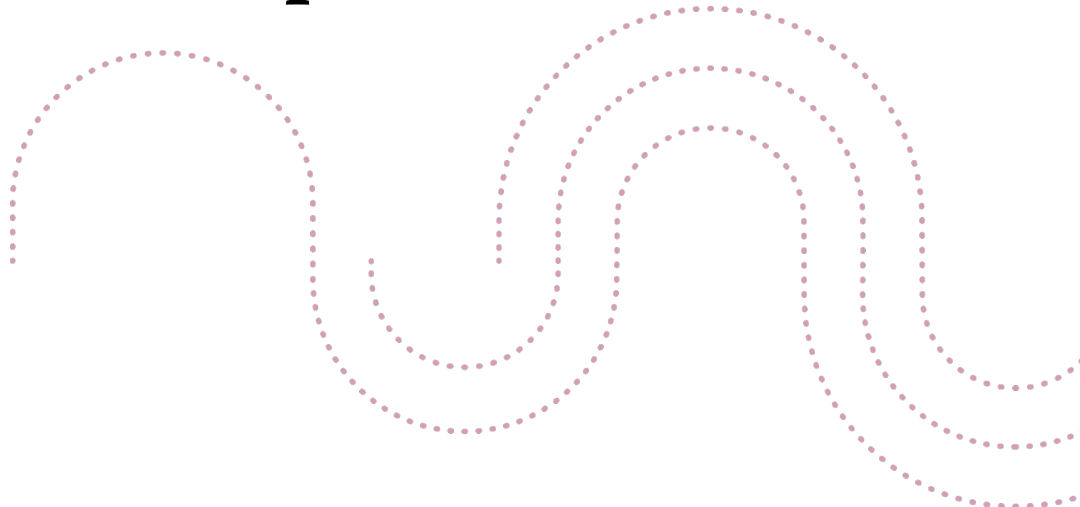
The ROI Methodology®

Designing for the Delivery of Business Results



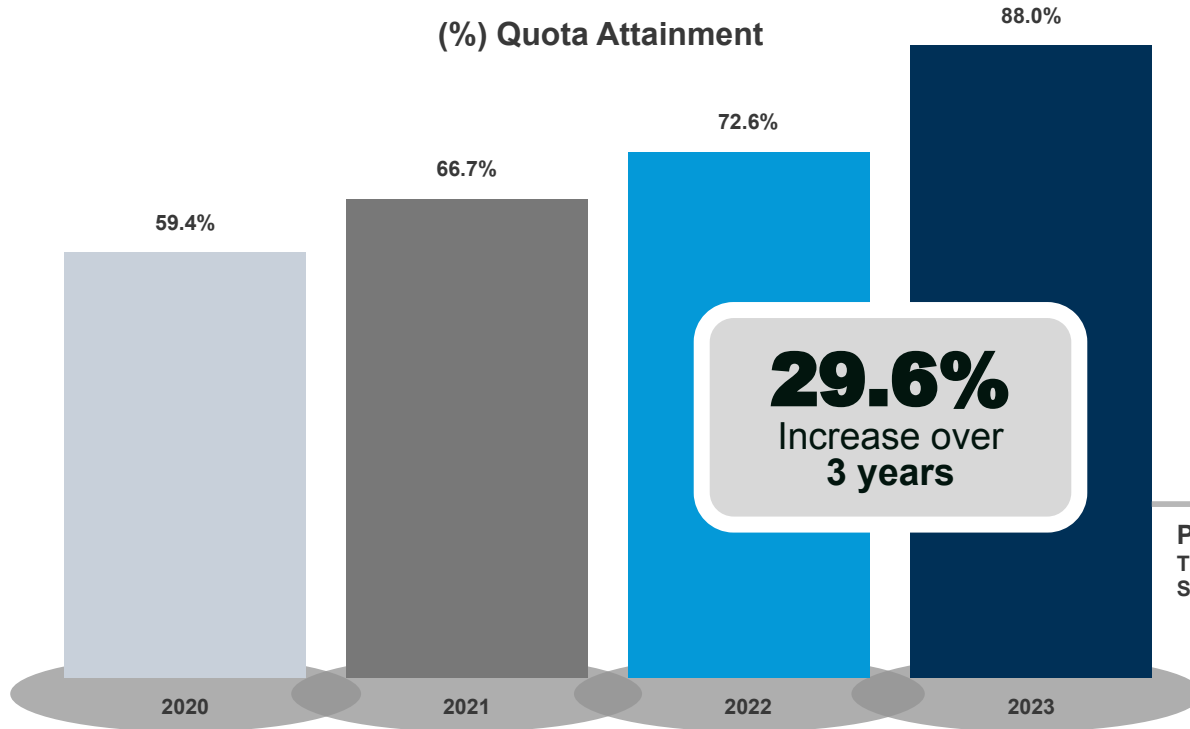


Why is **Learning Impact** and ROI Important at Spectrum?



Make An Impact

Objective: Improve seller quota attainment and productivity while reducing attrition.



Team awards



Brandon Hall - Gold

- 2022 Best Advancement in Sales Enablement Tools
- 2023 Best Sales Onboarding Program



2023 ONCON Icon Awards

- Top 50 Learning and Development Team Award



2023 Training APEX Top 100 Award

Parameters and Inclusions/Exclusions

Timeframe: 0-9 months after graduation

Sales Channels: Mid-Market, Strategic Sales, and Vertical Markets

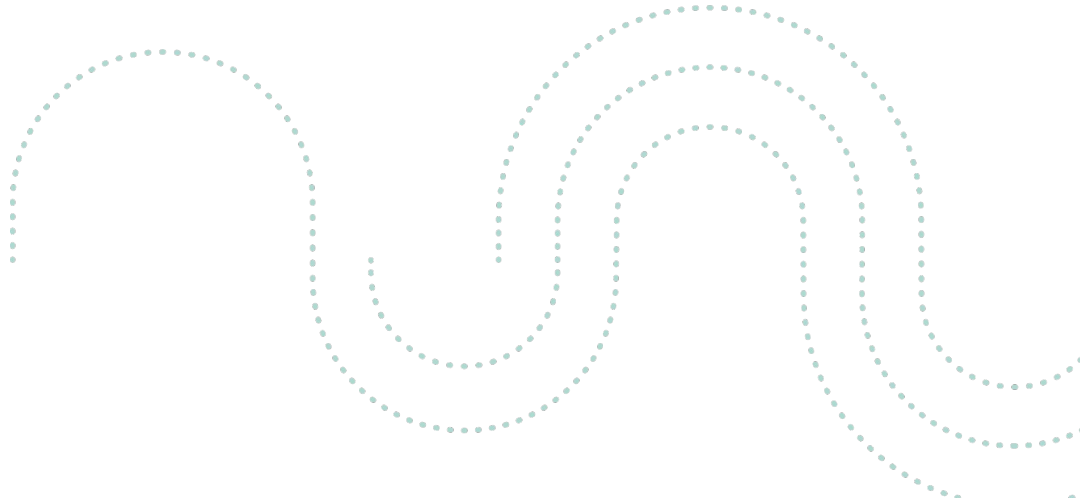
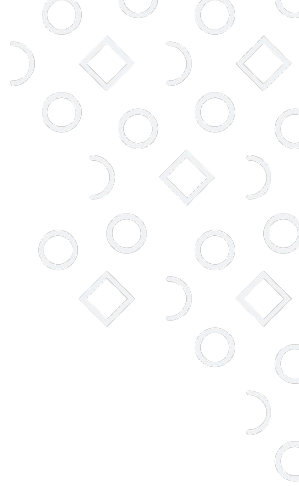
Sellers included in this report participated in each week and completed the entire curriculum. No transfers were included.



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What is **LearnOps** and Why is it Important in the Context of ROI ?





LearnOps is derived from DevOps, RevOps, MarketingOps, etc.

- **People, processes, best practice, and technology** work together
- L&D can **respond to demand** faster and place resources in the right place at the right time
- **Better collaboration** between departments, **faster cycles** and **higher quality solutions**



“L&D teams should consider adopting a Learning Operations process to bring disparate tools together into a more natural workflow, making it easier to articulate to executives where L&D stand and where we’re going on projects.”

— Rob Lauber,
Former CLO at McDonalds



McKinsey
&Company

“Learning needs to be deeply integrated with an organization’s strategy and core talent processes. Yet many companies feel their functions are ill-equipped to play such a role.”

Nicolai Chen Nielsen, Faridun Dotiwala, and Matthew Murray

A transformation of the learning function: Why it should learn new way



What's holding **L&D** back?

Alignment with business objectives, collaboration with stakeholders, strategic planning, resource maximization, and actionable data remain out of your L&D organization's reach unless you address the fundamentals of operational efficiency.



**67% Limited
Resources**



**41% Scope
Creep**



**37% Lack of
Standardization**

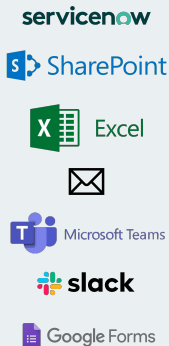


L&D Teams Need Speed + Scale but Learning Operations are Disparate

Status Quo

- 85% of L&D teams use 3-8 generic tools to manage learning operations
- 69% of L&D teams would like to consolidate

Intake



Strategy



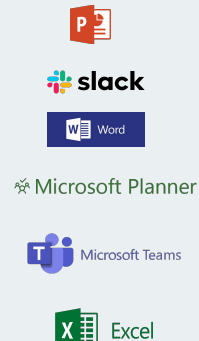
Planning



Capacity



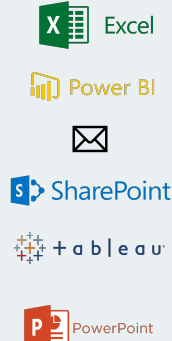
Design



Measure



Insights





Disparate IT & Generic PM Tools are Inefficient and Ineffective

Time

Generic tools take away ownership from L&D, forcing dependency on IT



Money

Inefficiencies cost L&D time, money, and cause negative ROI



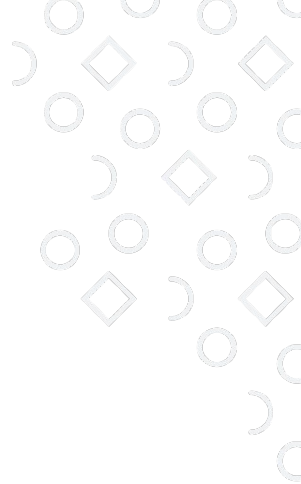
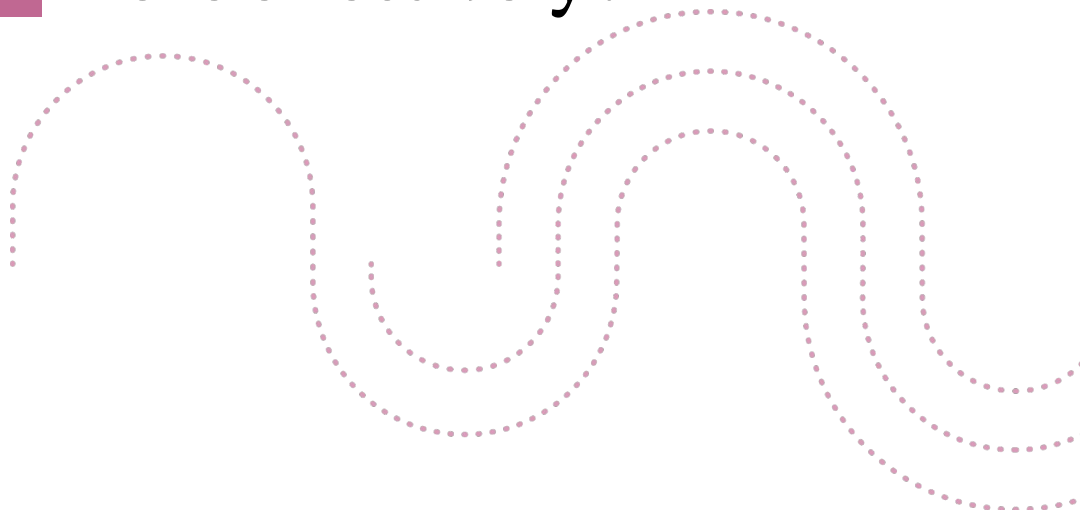
Data

Disjointed systems lead to data silos and hinder decision-making



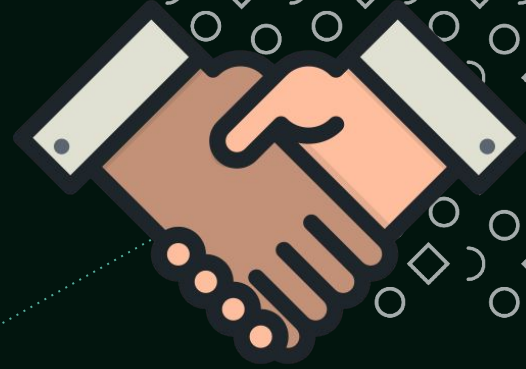


**What steps can be taken to
make L&D more efficient and
measure ROI more effectively?**



ROI INSTITUTE®

Founded in 1992, mission is to be the global authority on measurement and evaluation of all types of projects and programs, including measuring the financial ROI.

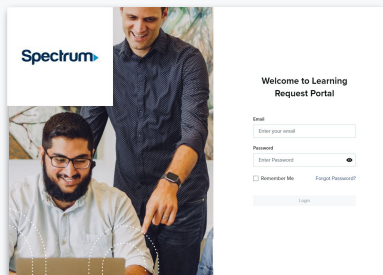


COGNOTA

*Founded in 2015, mission to power LearnOps for all enterprises globally.
Vision to help redefine L&D as a Strategic Business Catalyst.*

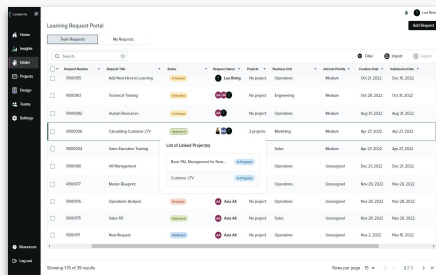


Power Learning Operations Across the Enterprise



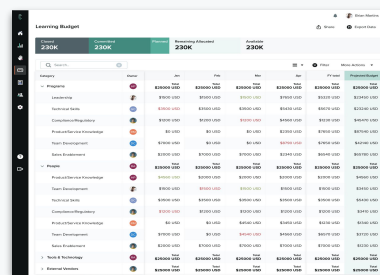
1. Training Intake

Business partners across the entire enterprise access a white-labeled portal to submit training needs.



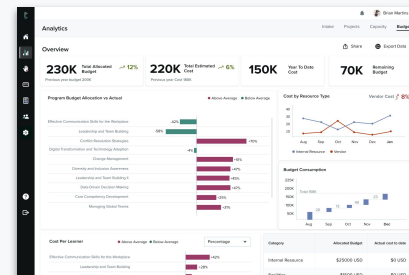
2. Prioritize Learning

Cognota auto-routes requests to the right L&D team where they respond and collaborate on learning projects.



3. Manage Resources

Cognota helps L&D teams manage budgets and capacity to make quick decisions around operations.



4. Measure Outcomes

Access to operational data to measure ROI and business impact of learning investments.



Manage Consultations & Training Requests with Business Partners

The screenshot displays the 'Learning Request Portal' interface. On the left is a dark sidebar with navigation links: Home, Insights, Intake (active), Programs, Projects, Tasks, Design, Teams, Settings, Resources, and Log out. The main content area has a header with 'COGNOTA' and a user profile for 'Lea Rning' with an 'Add Request' button. Below the header are tabs for 'Team Requests' and 'My Requests'. A search bar and a table of requests are visible. The table has columns for Request Number, Request Title, Status, Requester Name, Request Owner, Projects, Business Unit, Internal Priority, Form Used, and Cre. The table lists 15 requests, with the first one being 'Update Chang' (R000198). A modal form is open for the 'Customer Success & Support Requests' form. The form has a 'Form' tab and a 'Make draft public' toggle. It is divided into 'Basic Information' and 'Request Details' sections. The 'Basic Information' section includes a 'Request Title*' field with the value 'Agile Planning Training' and a 'Business Unit*' dropdown menu with the value 'Product, Design & Engineering Department'. The 'Request Details' section includes a 'Form Used' dropdown menu with the value 'Customer Success & Support Requests'. Below these are two text areas: 'What is prompting the need for this training request? Describe the problem you are having.' and 'What type of training solution do you think helps to solve the problem? E.g. learning material, coaching, mentoring, attending a class/virtual session, accessing off-the-shelf content, etc.'. At the bottom, there are two more text areas: 'What does success look like? If Cognota makes an investment to help support this training request, what does the ideal outcome look like for you? Please describe what you or the business may be able to achieve by receiving this training.' and 'Other Information'.

Request Number	Request Title	Status	Requester Name	Request Owner	Projects	Business Unit	Internal Priority	Form Used	Cre
R000198	Update Chang								
R000202	test								
R000201	Dan's test								
R000200	test								
R000178	Online Training								
R000199	Assessment R								
R000179	New Employe								
R000197	New Product R								
R000194	New Marketing								
R000196	New Request								

Centralized intake across your business

- Empower business partners to submit learning needs from across the business
- Consult with requesters to clarify goals
- Quickly review and prioritize requests around objectives
- Keep business partners informed



Prioritize Needs into Learning Programs, Projects, and Tasks

Align programs with business needs

Overview

Program: Customer S...

Description

This program is for a series of modules related to customer training.

Owners*

Andrew Grocholski

Status*

Not Started

Delivery Type

Online

ID: PM000008

Projects By Status

10 Projects

1/10

Now
In Queue
On Hold
In Progress
Completed

Projects Completed 2/10

Average Task Completion 20%

Projects at Risk 0

Projects Overdue 4

Projects

This Section shows details of program

Link Projects

Title	Status	Priority	Progress	Start Date	Target Completion Date	Actual Completion Date
Employee Onboarding - Jan 2023 Cohort	Blue bar	High	25%	Jan 9, 2023	Mar 15, 2023	-
Update Work from Home Policy	Green bar	High	100%	Jul 1, 2022	Jul 8, 2022	Jul 8, 2022
Time Management	Green bar	High	0%	Jan 2, 2023	Dec 29, 2023	-
Accounting for Non Accountants	Blue bar	Medium	0%	Oct 5, 2022	Dec 30, 2022	-
Customer LTV	Blue bar	High	100%	Jan 3, 2023	Dec 29, 2023	-
Remote Work Policies	Green bar	Medium	0%	Jul 1, 2022	Jul 15, 2022	Jul 11, 2022
Needs Assessment	Blue bar	Medium	0%	May 12, 2023	Jun 21, 2023	-
Customer Support Training [CS Refresh]	Blue bar	Medium	0%	Jan 3, 2023	Dec 29, 2023	-

- Align around a measurable investment strategy keeping L&D focused
- Create programs and projects that directly align with business needs
- Track investment and time spent on each business request



Enable L&D to **Operate More Efficiently:** Measure Program Impact & ROI Using One Platform

The screenshot displays the 'Leadership Training' interface. At the top, there's a navigation bar with a back arrow, 'All Programs', a user profile for 'Stella Jacobs', and tabs for 'Overview' and 'Strategy'. The main content area is titled 'Program Strategy' with a 'Beta' badge. Below this, a subtitle reads 'Plan for success by setting the objectives in the following categories'. There are six strategy cards arranged in a 3x2 grid:

- Reaction**: How participants should feel about the program. Includes a link 'Go to Reaction Strategy'.
- Learning**: Skills and knowledge participants should gain. Includes a link 'Go to Learning Strategy'.
- Application**: Behavior changes created by the program. Includes a link 'Go to Application Strategy'.
- Impact**: Business improvement resulting from the program. Includes a link 'Go to Impact Strategy'.
- ROI**: Financial gains required for success. Includes a link 'Go to ROI Strategy'.
- Intangible Benefits**: Business improvement resulting from the program. Includes a link 'Go to Intangibles'.

On the right side, there's a sidebar titled 'ROI Methodology' with a right arrow. It contains a section 'Tips and Examples' with text: 'Cognota has partnered with The ROI institute on Program Strategy and Measurement. The following tips and examples were developed with us as a part of this collaboration.' Below this are three links: 'Learning Objectives 101', 'Tips To Setting Objectives', and 'The ROI Institute's 12 Principles', each with an external link icon. At the bottom of the sidebar is a graphic of a lightbulb on a green field.

Create program strategies using the ROI Methodology®

- Align around a measurable learning strategy keeping L&D focused on outcomes
- Set objectives for each evaluation level that applies to your program
- Helpful tips and hints throughout the flow via ROI Methodology®



Create smart objectives using a framework that follows best practices in ROI Methodology®

[← Program Strategy](#)

Leadership Training / Reaction Strategy

<

>

Reaction Strategy

Export PDF

Objective Setting

Your learners' experience is important. Engaged and satisfied learners are the foundation for a successful program. What reactions does this program need to elicit?

Add Objective

Objective 1

Learners should find this program relevant to their role and job duties.

No Results Added

Manage Objective

Objective 2

Learners should find the content of this program useful in their work.

🏆 Objective Met

Manage Objective

Objective 3

Satisfaction from completing the program

🙄 Objective Not Met

Manage Objective

ROI Methodology®

Tips and Examples

The following tips and examples were developed as a part of the collaboration between Cognota and The ROI Institute.

Measuring Reaction

Tips To Setting Objectives

Reaction Evaluation Planning

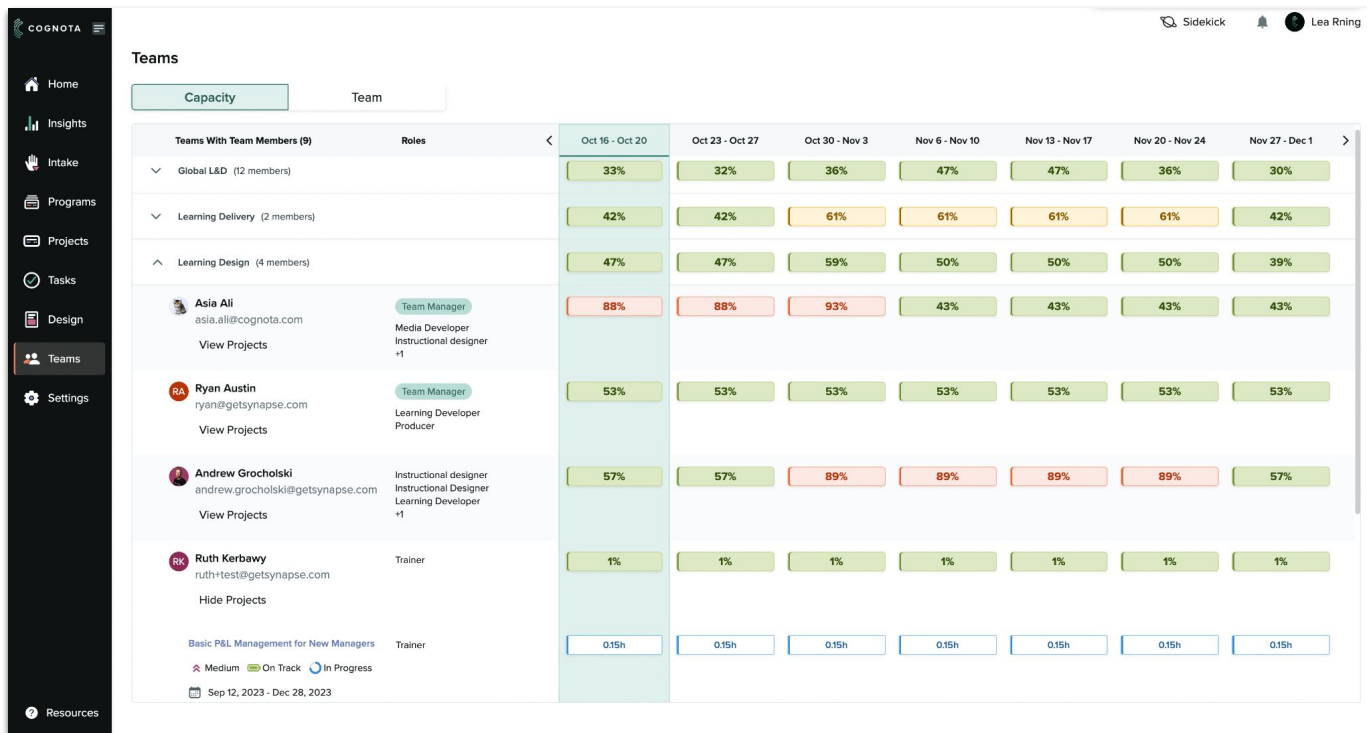
Evaluation Plan & Results



Manage Resources like Capacity and Budgets

Insights into Capacity and Budget

- Understand team capacity and plan the cost, scope, schedule and resources required for learning programs and projects
- Gain visibility into planned budget and time vs actual investments and sort by dimensions such as strategic objective, business partners, etc.





Design Effective Learning Solutions

Collaborate with business partners and SMEs

- Incorporate design thinking and align learning solutions with program objectives
- Cut design time down up to 70% while better managing learning content and project assets

The screenshot displays the Cognota software interface, which is used for designing learning solutions. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: Home, Insights, Intake, Programs, Projects, Design (selected), Teams, Settings, and Resources.
- Top Bar:** Shows the current design title 'Revenue Playbook' and a 'Lock Content' toggle.
- Main Content Area:** Displays a hierarchical structure of topics and lessons. The 'Design' tab is active, showing a list of topics under 'Lesson 4: SDR Process & Resources'. The selected topic is 'Topic 4: SDR - AE Handoff'.
- Content Table:** A table listing various assets and content items. The table has columns for Thumbnail, Name, Content Type, Added by, Added On, and Tasks Linked.

Thumbnail	Name	Content Type	Added by	Added On	Tasks Linked
	Solar System	Design	LR Lea Rning	Sep 28, 2022	2 tasks linked
	SCORM File	Weblink	LR Lea Rning	May 12, 2022	No task linked
	Cognata-Icon-Green copy.jpg	File	LR Lea Rning	Sep 28, 2022	No task linked
	Storyboard	Weblink	LR Lea Rning	Oct 17, 2022	1 task linked
	DCRSP-21-641 (TWI)	Weblink	LR Lea Rning	Nov 14, 2022	No task linked
	Workstation Set-Up	Design	LR Lea Rning	Dec 1, 2022	No task linked
	WFH Policy	Design	LR Lea Rning	Dec 1, 2022	No task linked
	Add Field Screen.png	File	LR Lea Rning	Sep 11, 2023	No task linked

Evaluation Plan & Results

Recommended methods for evaluating reaction include post-program questionnaire, test and/or interview.

Data Collection Method

Survey 

Focus Group 



Survey

Data Source

Participants 



No. of Respondents

24

Collection Timing

3 weeks



Questions

2 questions added

[View questions](#) →

Focus Group

Data Source

Participants 



Objective Measurement

Reaction Objectives

Relevance



Useful



Completion satisfaction



Evaluation Evidence

Keep related documents together by uploading them here.



leadership training fee...xls



leadership training fee...xls



Drag file here or [Choose file](#)

Supported file types: JPG, PNG, mp4, mpeg, mp3, pdf, txt, .ppt, .pptx, .xls, .xlsx, .doc, .docx, .odt, .odp, .ai, .psd, ods, .csv



Measure the Impact of Learning Investments

LearnOps[®]
+
ROI
Methodology[®]

Learning Strategy

Objectives Plan Budget

Class	230K	Committed 230K	Released	Remaining Allocated 230K	Available 230K
Category	Search...				
Programs					
Leadership	Total \$25000 USD	\$15000 USD	\$10000 USD	\$10000 USD	\$10000 USD
Technical Skills	Total \$35000 USD	\$35000 USD	\$35000 USD	\$0 USD	\$0 USD
Compliance/Regulatory	Total \$10000 USD	\$10000 USD	\$10000 USD	\$0 USD	\$0 USD
Product/Service Knowledge	Total \$0 USD	\$0 USD	\$0 USD	\$0 USD	\$0 USD
Team Development	Total \$70000 USD	\$0 USD	\$0 USD	\$0 USD	\$0 USD
Sales Enablement	Total \$20000 USD	\$70000 USD	\$70000 USD	\$0 USD	\$0 USD
People	Total \$25000 USD	\$250000 USD	\$250000 USD	\$250000 USD	\$250000 USD

Leadership Training

Program Strategy

Plan for success by setting the objectives in the following categories

Reaction

How participants should feel about the program.

[Go to Reaction Strategy](#)

Application

Behavior changes created by the program.

[Go to Application Strategy](#)

ROI

Financial gains required for success.

[Go to ROI Strategy](#)

Learning

Skills and knowledge participants should gain.

[Go to Learning Strategy](#)

Impact

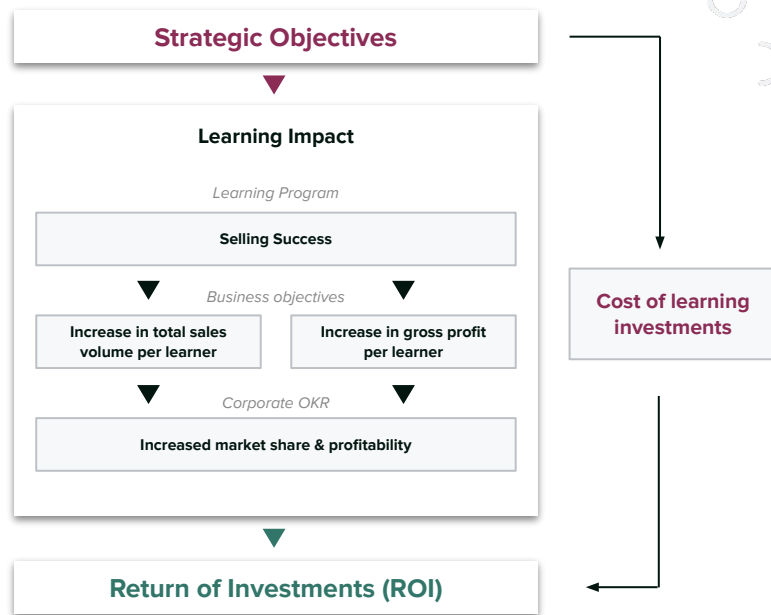
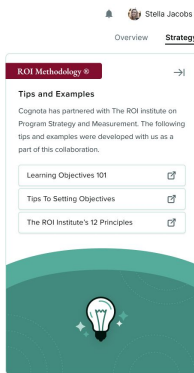
Business improvement resulting from the program.

[Go to Impact Strategy](#)

Intangible Benefits

Business improvement resulting from the program.

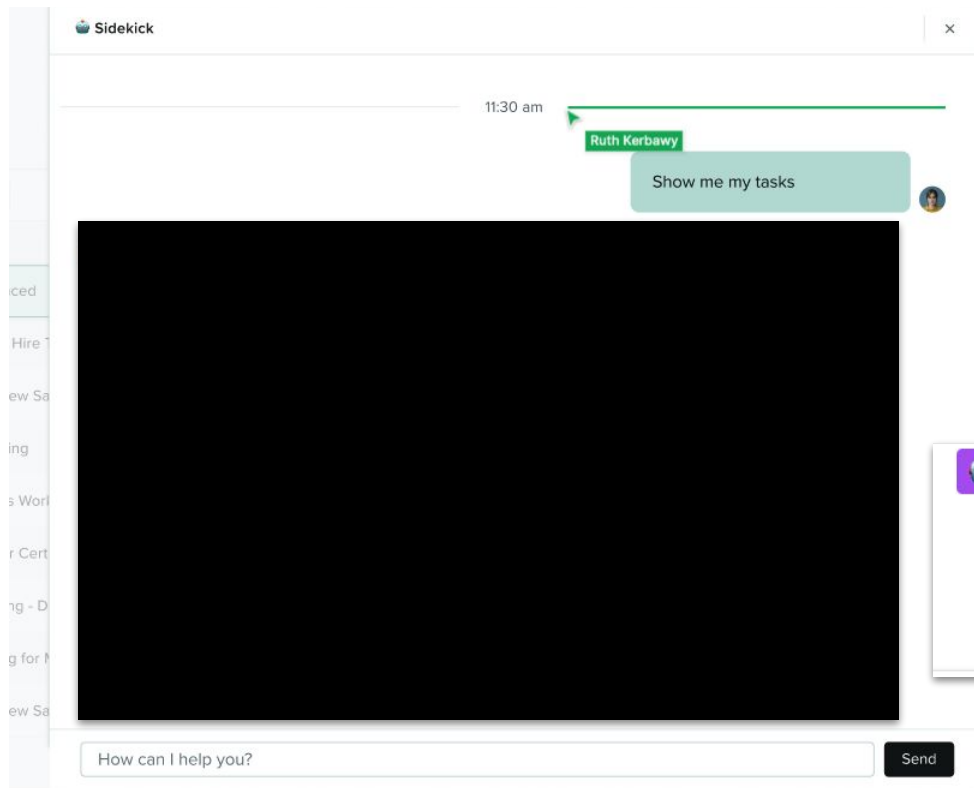
[Go to Intangibles](#)



e.g.- Sales Team Achieves Measurable Objectives



AI in Learning Ops

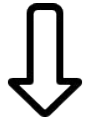


AI Assistant called Sidekick

- Sidekick is an AI-powered assistant that helps L&D manage and automate learning operations



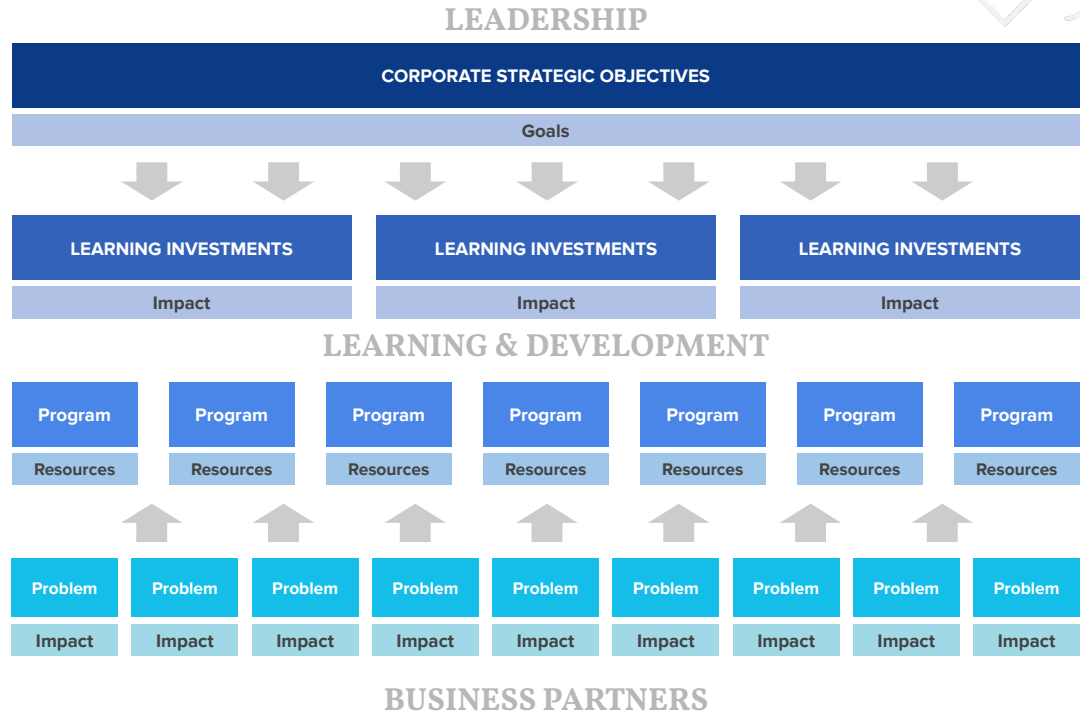
L&D as a Catalyst for Performance & Growth

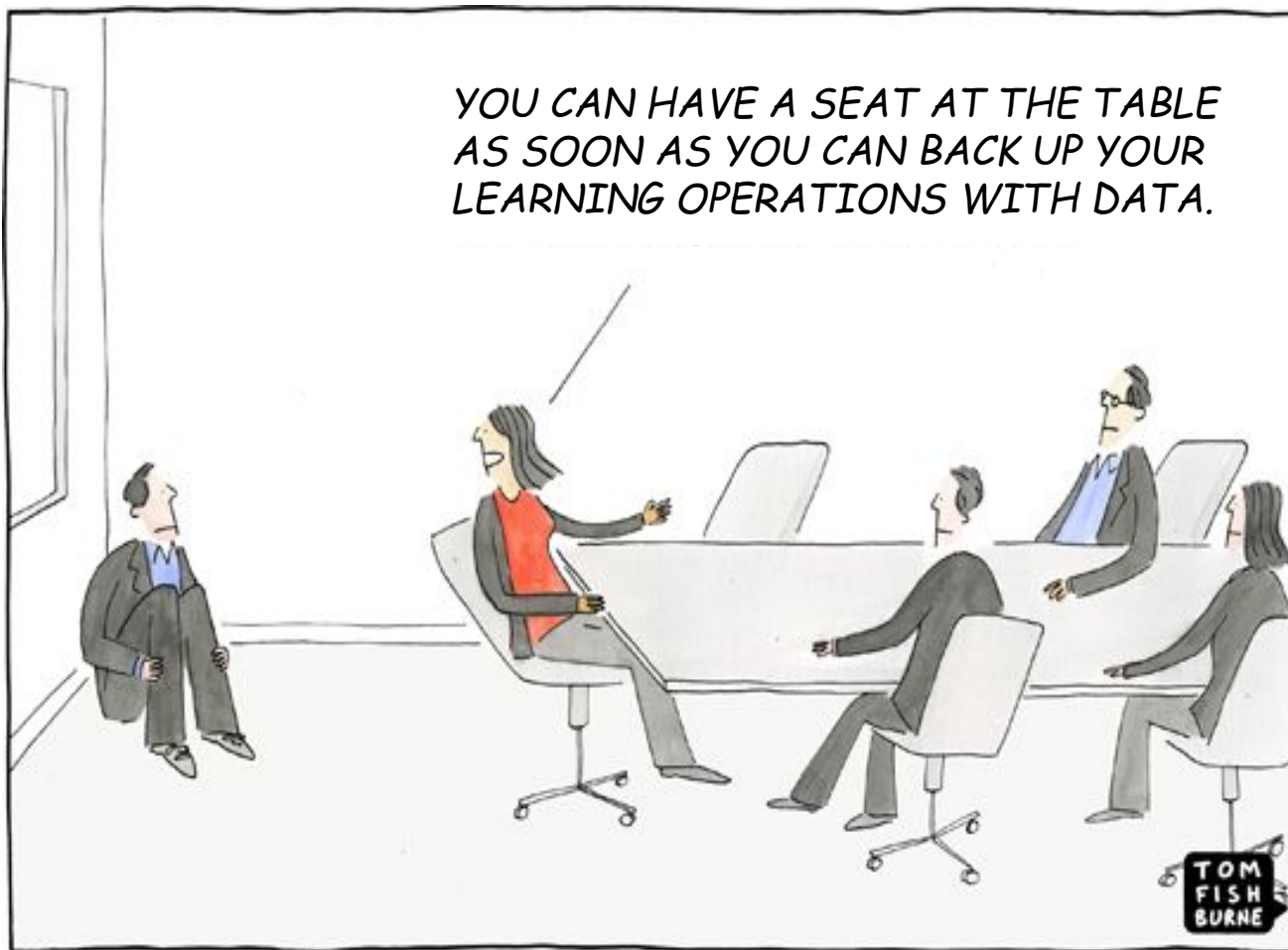


Top down strategy to meet business objectives



Bottom up partner model to improve business performance





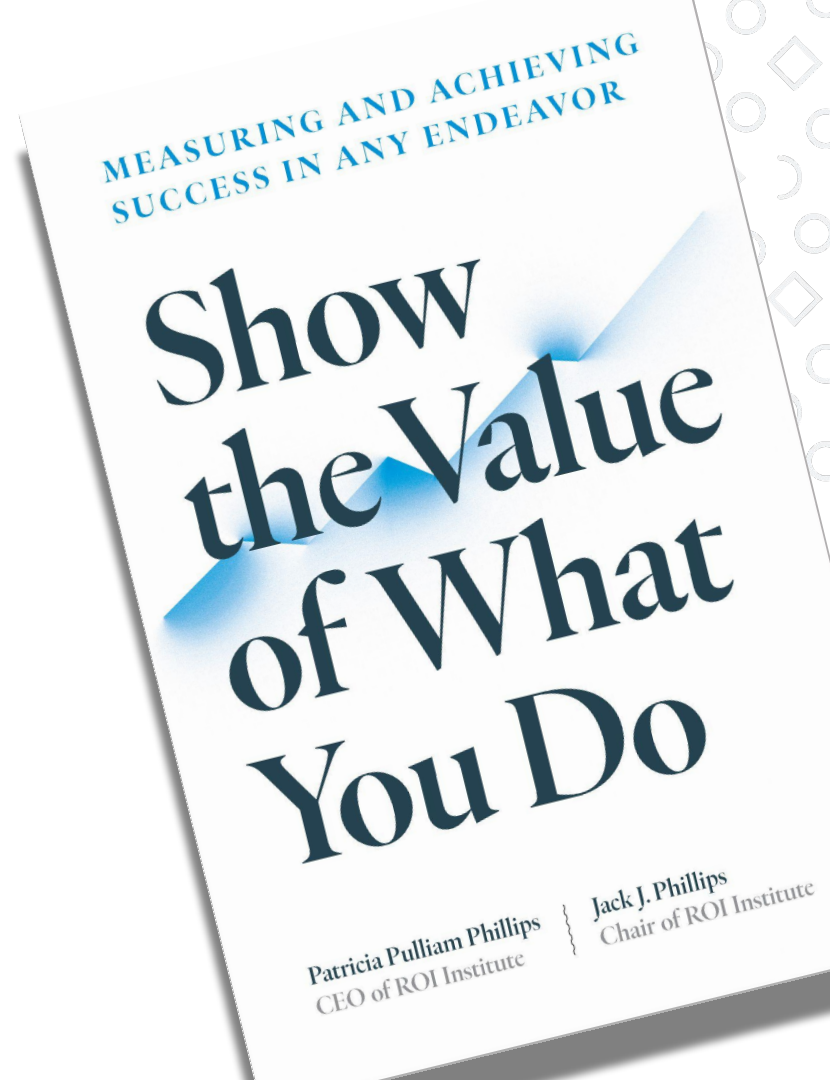


Book a Consultation with Cognota

Get the eBook for Free

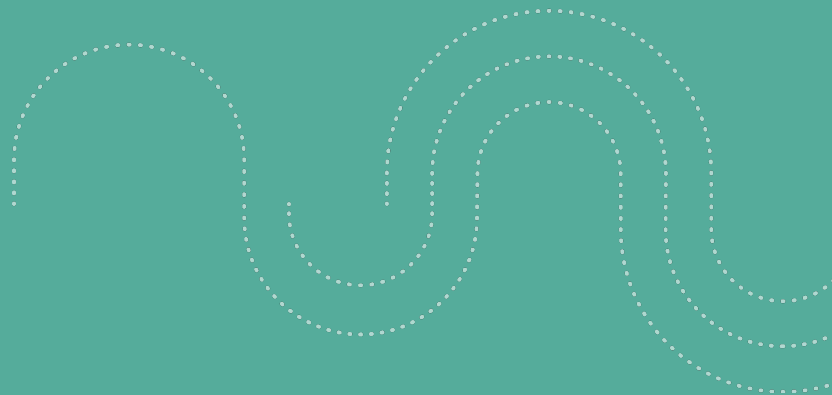


Book a Consultation with
Cognota and receive a free
e-copy of *Show the Value
of What You Do* by Patti
and Jack Phillips!





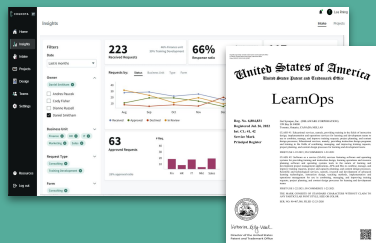
Questions





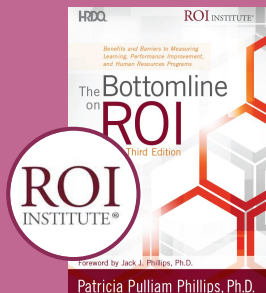
Recommended Resources for LearnOps and ROI

Software



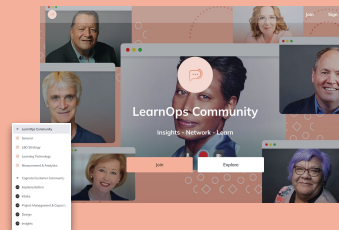
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Partnerships



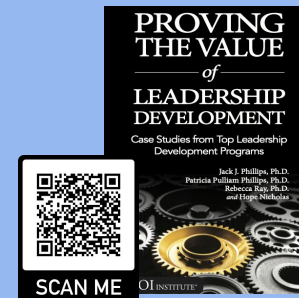
ROIInstitute.net

Community



LearnOps.com

Book



On Sale for \$25 to Registrants!



Thank You

