



*Show the Value of What You Do:
Measuring and Achieving Success*

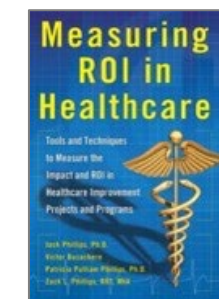
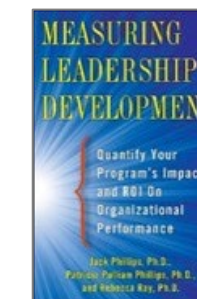
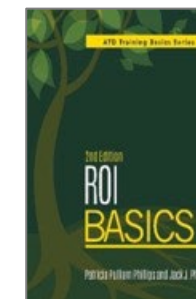
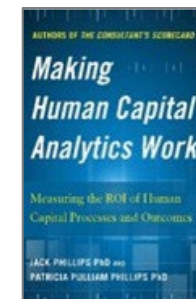
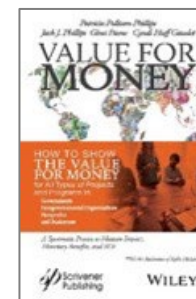
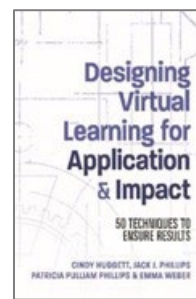
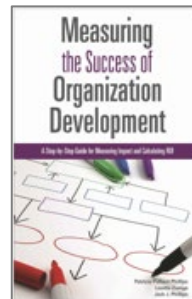
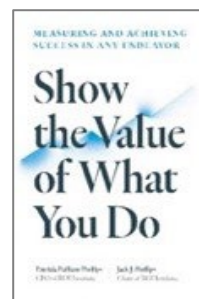
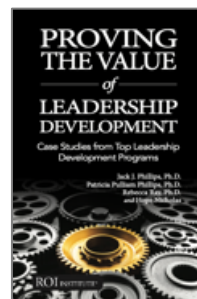
Patti P. Phillips, Ph.D., CEO, ROI Institute, Inc.

Patti P. Phillips, Ph.D.

- CEO, ROI Institute, Inc.
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- Member, International Federation of Training and Development Board
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Author of these books and more.



Post Session Resources



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MEASURING AND ACHIEVING
SUCCESS IN ANY ENDEAVOR

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Patricia Pulliam Phillips Jack J. Phillips
CEO of ROI Institute Chair of ROI Institute

ROI INSTITUTE®



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

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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.

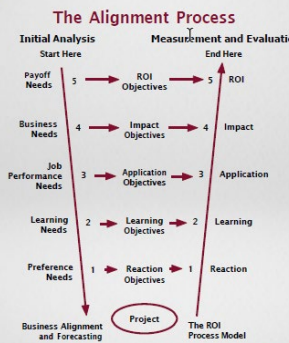
The documents below provide questions you can use with clients to help ensure alignment between the ultimate payoff opportunity for the organization and a solution. It is a tool to support implementation of the left side of the alignment model (below). In this document, you will find:

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.

The Alignment Process

Initial Analysis Measurement and Evaluation

Start Here End Here



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Measuring and Achieving Success

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

Objectives

After completing this session, you will be able to:

- Clarify why the work you do matters.
- Define success with specific, measurable objectives, including ROI.
- Create greater value by using what you learn through your measurement process.



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

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?

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

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

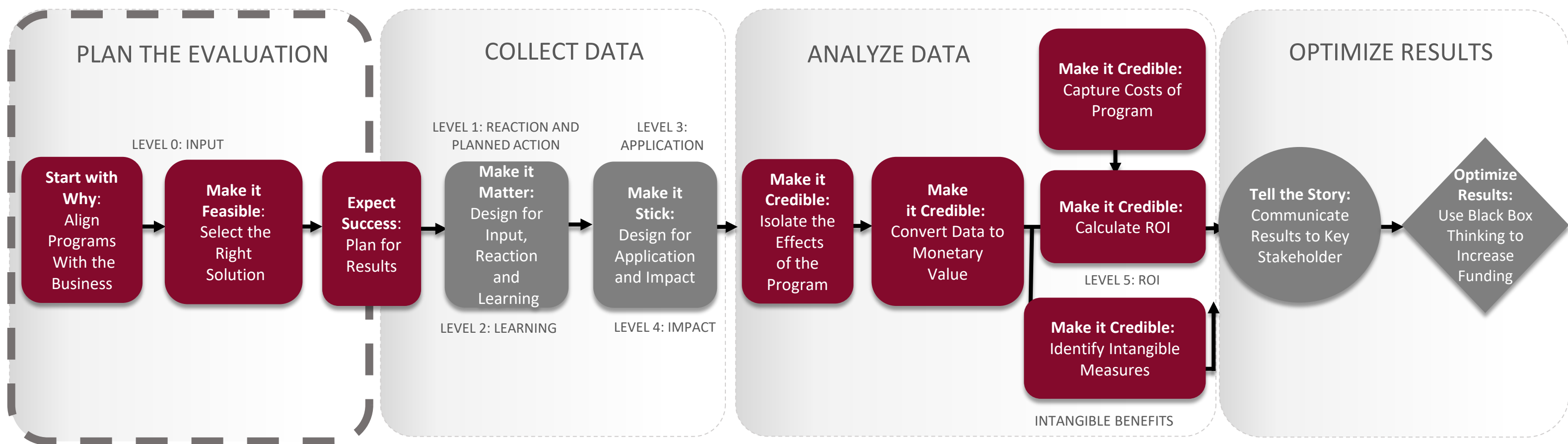


Five-Level Evaluation Framework

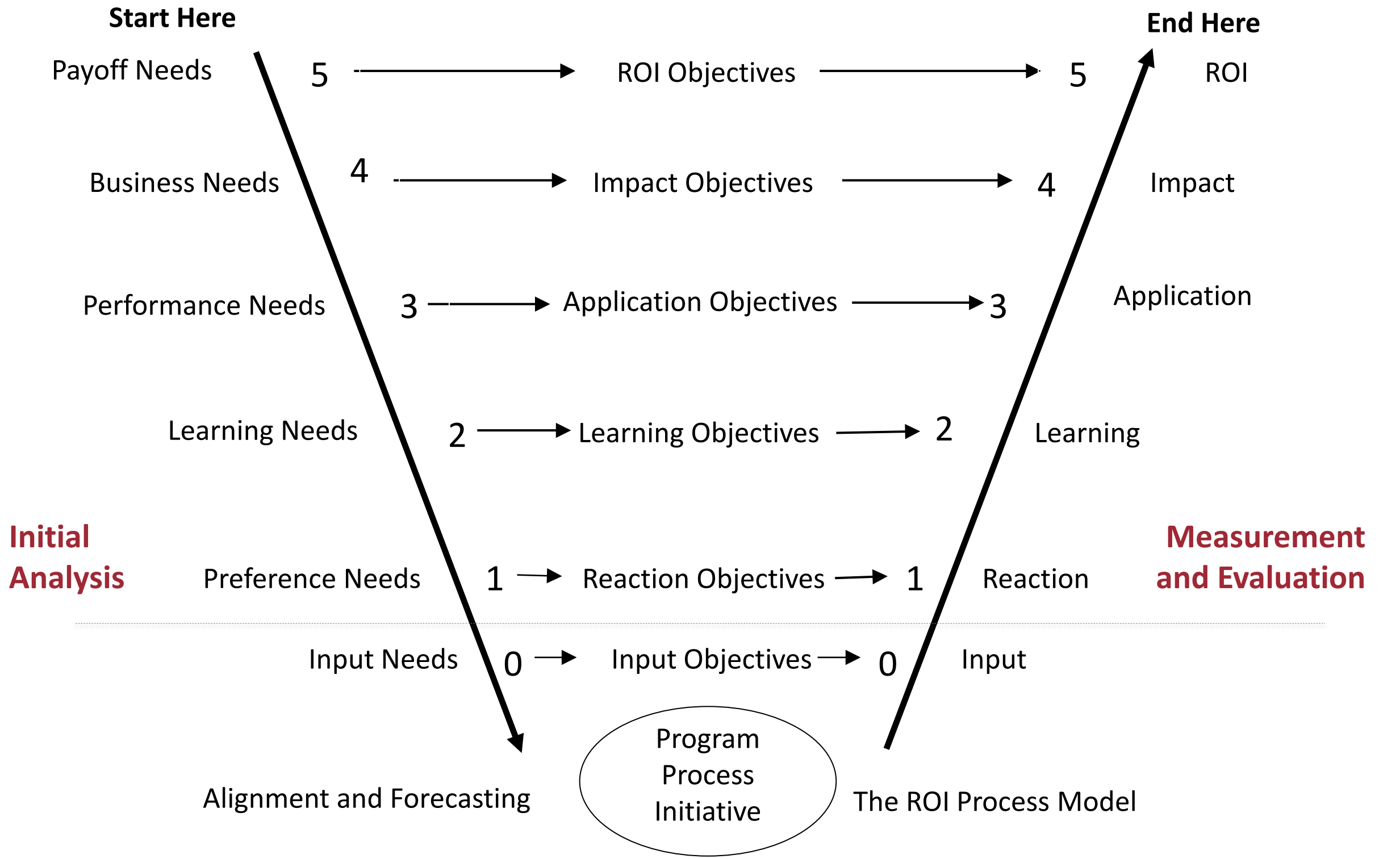
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The ROI Methodology Process Model

Designing for the Delivery of Business Results



Alignment Model



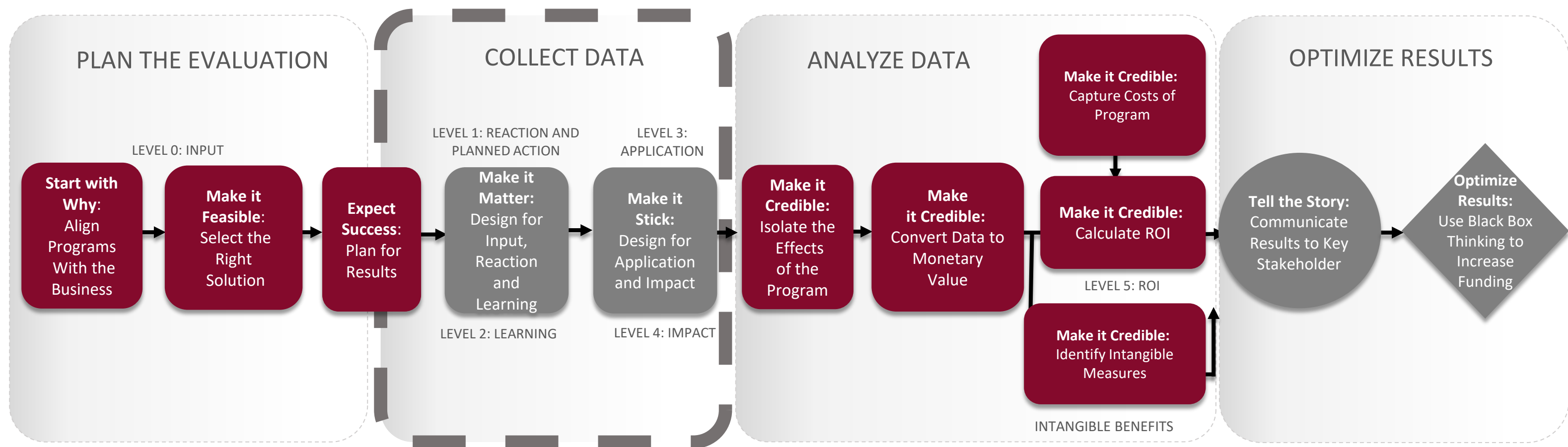
Matching Evaluation Levels with Objectives

After completing this program, participants should:

1.	Decrease citizen complaints by 20% in one year.	
2.	Use problem-solving skills to uncover product defect causes.	
3.	Be able to demonstrate the five steps to calm an upset customer.	
4.	Rate the facilitator 4 out of 5 on presentation skills.	
5.	Decrease the amount of time required to develop a proposal.	
6.	Achieve a 20% ROI one year after program implementation of a sales incentive system.	
7.	Perceive the content to be relevant to their actual situations (4.5 out of 5).	
8.	Decrease security breaches by 25% in six months.	
9.	Conduct a proper investigation using the seven-step process in 95% of complaint situations.	
10.	Score an average of 75 or better on new strategy quiz.	

The ROI Methodology Process Model

Designing for the Delivery of Business Results



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.

Program Design



12-month open-enrollment virtual program

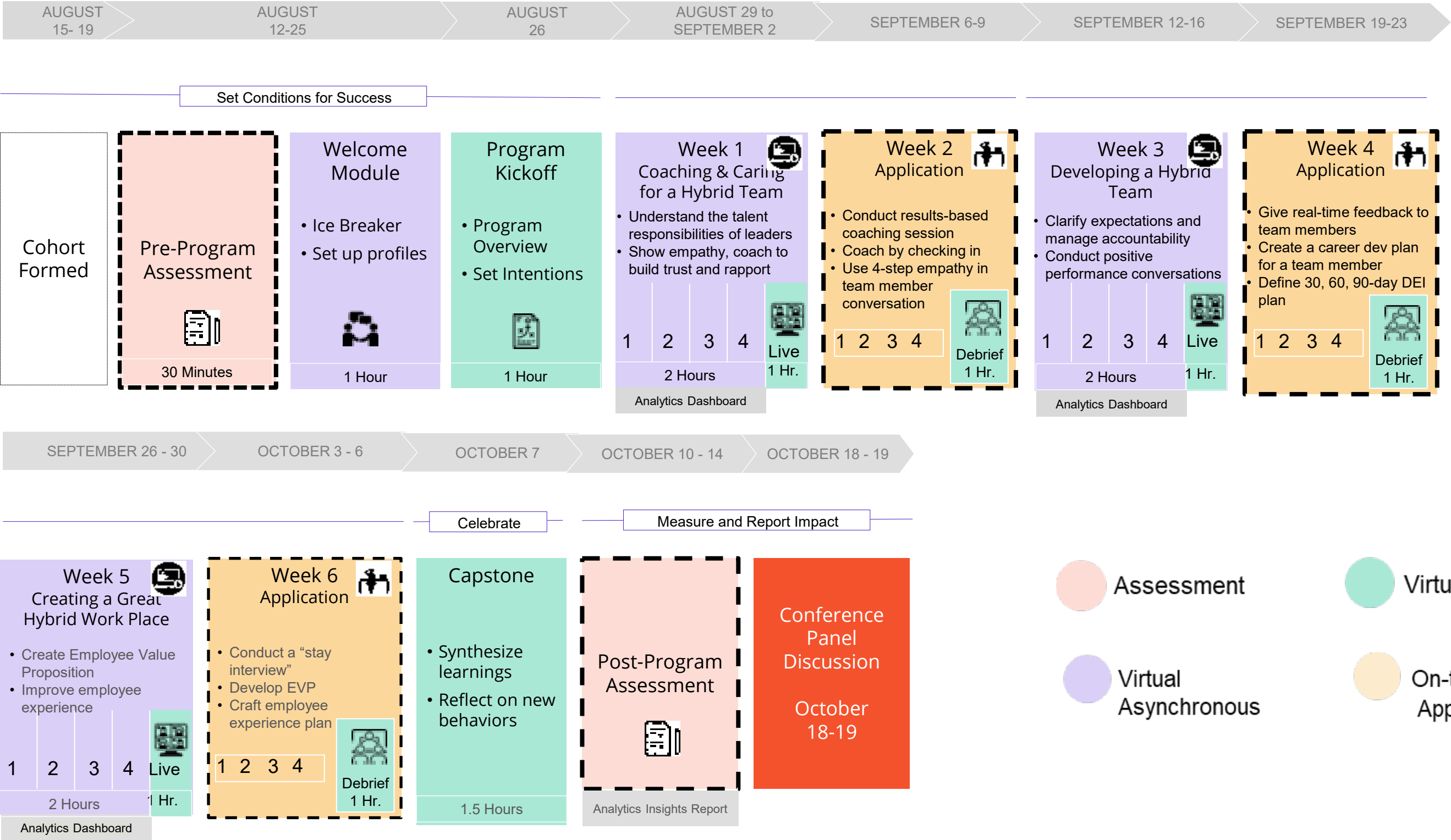
- 12 months online
- Monthly skill-building (first six months)
- Special guest speakers (second six months)



Data Collection

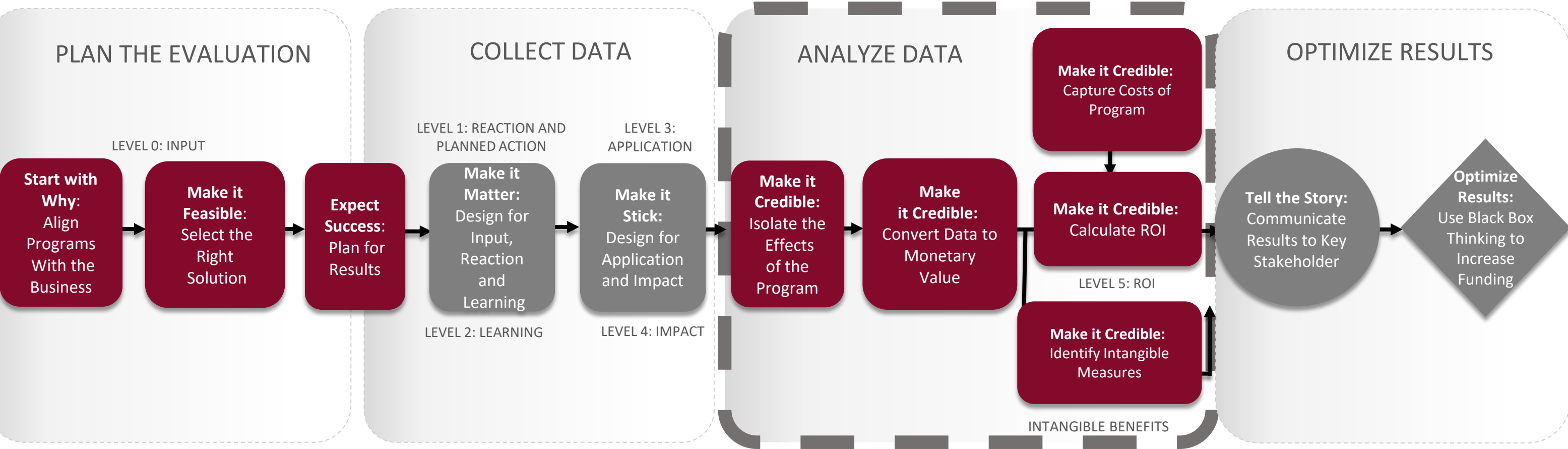
- Application Process (Business Alignment)
- Polling and chat each month during skill building
- Questionnaire
 - Three months into program
 - Six-month skill building completion
 - 12-month end of program
- Interviews

Leading in a Hybrid Work Environment: Program at A Glance



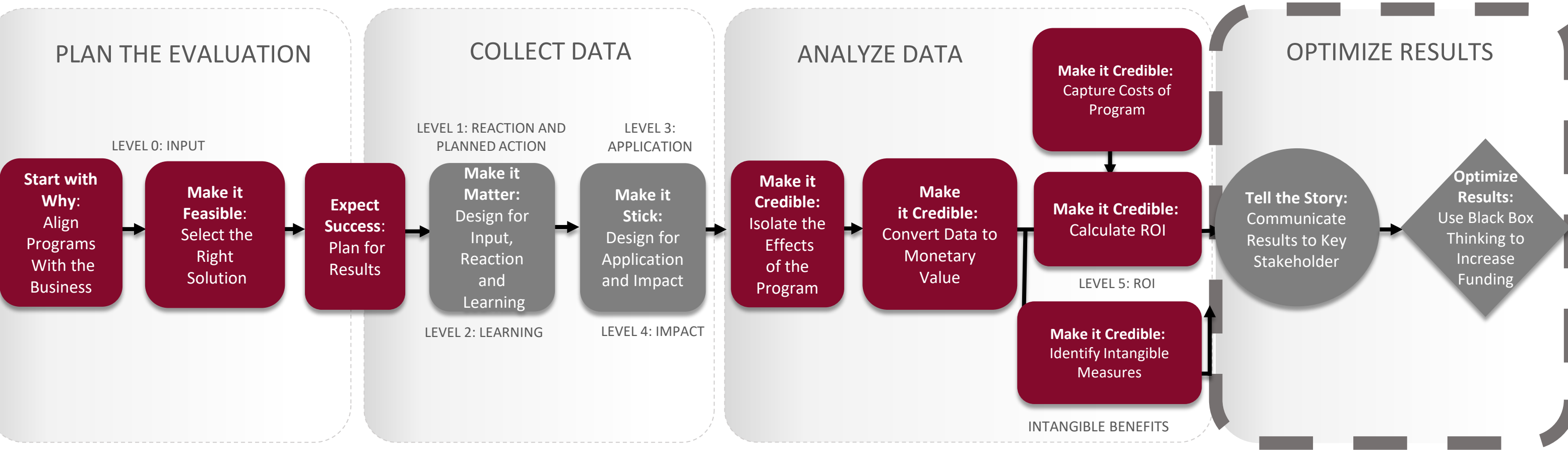
The ROI Methodology Process Model

Designing for the Delivery of Business Results



The ROI Methodology Process Model

Designing for the Delivery of Business Results



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) 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

Healthcare, Inc.

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

ROI Calculation

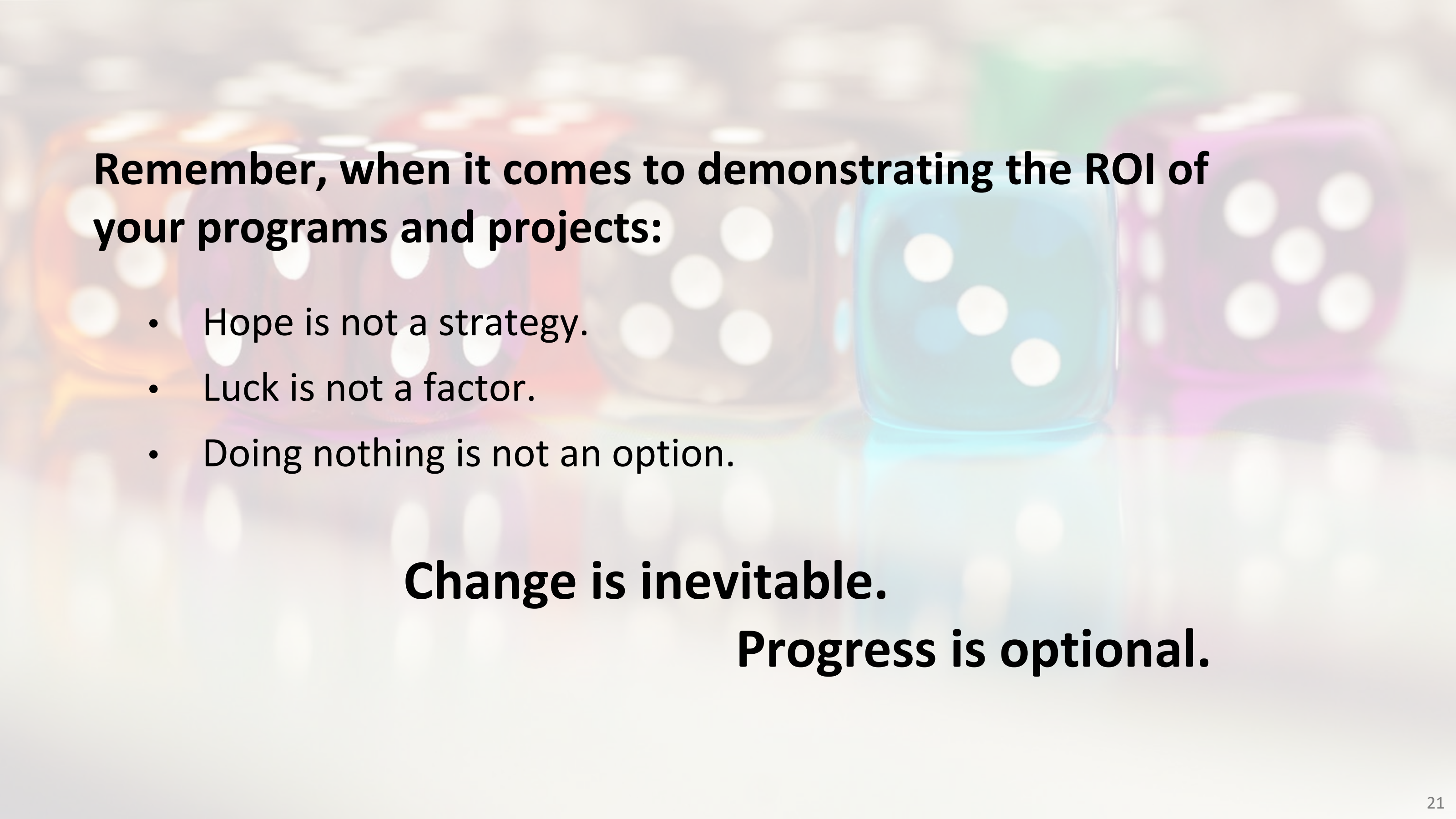
$$\text{BCR} = \frac{\text{Program Benefits}}{\text{Program Costs}} =$$

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

To show the value of what you do

- ✓ Align programs with the business
- ✓ Select the right solution
- ✓ Plan and design for results
- ✓ Collect data throughout the program
- ✓ Analyze data appropriately
- ✓ Communicate results
- ✓ Learn from what works and what doesn't and improve your program





Remember, when it comes to demonstrating the ROI of your programs and projects:

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

Change is inevitable.

Progress is optional.



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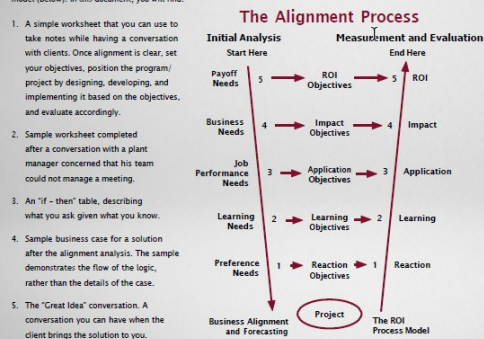
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Scan the QR code to access
resources from today's session.



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