

ROI Estimator

The ROI Estimator, a digital tool derived from ROI Institute research, will help program owners, designers, and developers in any organization plan for an improved ROI by making informed decisions. The ROI Estimator will allow users to:

- Estimate ROI based on planned actions and influential factors.
- Enable dynamic adjustments post-implementation for optimal ROI.
- Educate clients on achieving impact and positive ROI.
- Recommend follow-up evaluation, especially for major programs.

Access
ROI Estimator and
Other Resources



Direct Reports—Rating: *The Greater the Number of Direct Reports, the Higher the ROI*

Approximately how many direct reports do the participants of this planned program have, on average?

- | | |
|---------|--------------------------------|
| 1. Zero | 4. 16+ |
| 2. 1-5 | 5. Direct reports are leaders. |
| 3. 6-15 | |

Business Alignment—Rating: *Align the Program to Business Measures in the Beginning*

To what extent is the planned program connected to business measure(s)?

1. There is no presence of a business measure or connection.
2. The connection is vague.
3. Some communication has been made to create an understanding of the connection.
4. One or more business measures are identified at the beginning of the program.
5. The business measure will be the focus of the program.

Appropriate Solution—Rating: *Ensure that the Proposed Program (Solution) is the Right Solution to Improve the Business Measures*

What has been done to ensure that the planned program is the most appropriate solution to improve the business measures?

1. Nothing.
2. There has been little discussion about how this program can improve the organization and deliver an impact.
3. There are some logical connections between using the content from the program and the outcome expressed as a business measure.
4. There will be significant discussion with participants, including activities to help them reach the conclusion (before their participation) that this is the right content/skill set that they need.
5. There has been ample formal discussion with each participant which has led them to logically conclude that this is a solution that will at influence the business measure.

Focus on Success—Rating: *Design for Success at Each Outcome Level*

Have you set objectives for your program at each outcome level including impact?

1. There are no objectives for the program.
2. There are some efforts made to connect the program to impact success.
3. There is communication about how impact is the desired success from the program. Reaction and learning objectives are developed.
4. There is a significant amount of connection to the business with an impact measure along with objectives for reaction, learning, and application levels.
5. There is a very significant amount of connection to the business. Very specific objectives are developed for reaction, learning, application, and impact.

Appropriate Audience—Rating: *Involve the Right Audience for the Program*

Will the intended audience for the program have an opportunity to use the knowledge and skills?

1. Less than 70% of the participants in this program will have the opportunity to use the knowledge and skill from the program.
2. Between 70% and 80% of participants are in the right roles and will have an opportunity to use the knowledge and skills from the program.
3. Approximately 80% to 90% of participants are in the right role and will have an opportunity to use the knowledge and skills from the program.
4. Between 90% and 95% of participants are in the right role and will have an opportunity to use the knowledge and skills from the program.
5. A very significant number, more than 95% of participants, are in the right role and will have an opportunity to use the knowledge and skills from the program.

Perceived Value—Rating: *The Program Should be Valuable to Participants*

Will your participants perceive the program as valuable (relevant, important to their success, and with the intent to use the content)?

1. No.
2. Yes, at least 30% of participants will perceive this program as valuable.
3. Yes, at least 50% of participants will perceive this program as valuable.
4. Yes, at least 70% of participants will perceive this program as valuable.
5. Yes, at least 90% of participants will perceive this program as valuable.

Manager Support—Rating: *Establish Supportive Partnerships with Key Managers*

Does the participant's immediate manager support this program?

1. No.
2. There is some manager support in general, but no specific plan.
3. There is moderate manager support. Managers of participants have been informed about the program and their role in making the program successful.
4. There is a significant amount of manager support. Managers of participants have been asked to take a more active role in ensuring that participants are prepared for the program and the subsequent follow-through.
5. There is a very significant amount of manager support. Managers will meet with the participants before the program to set goals, and then after the program to confirm the learning. Then, managers set expectations for use and are available as a coach when necessary.

Delivery—Rating: *Minimize Distraction in a Facility Designed for Learning*

In what format do you intend to deliver your program?

1. Online course completed in the office.
2. Blended-learning program completed in a distraction-free environment.
3. Teacher-led program conducted in the office.
4. An off-site training course.
5. An off-site training course led by an expert teacher.