

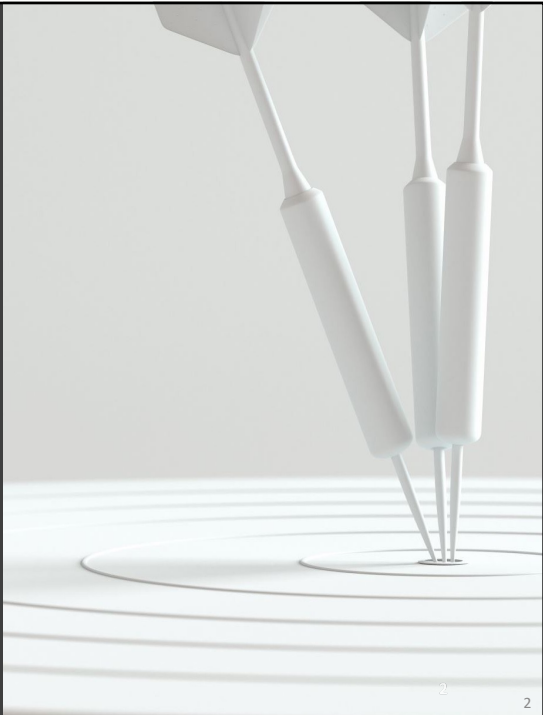


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Objectives

After completing this session, you will be able to:

- Change your approach to defining and achieving success while improving future results.
- Achieve success by delivering outcomes that matter.
- Add value to your work, your organization, and your community.

A photograph of three white pens pointing towards a target on a white surface. The target has concentric circles, and the pens are positioned to hit the center. The background is a light grey gradient.

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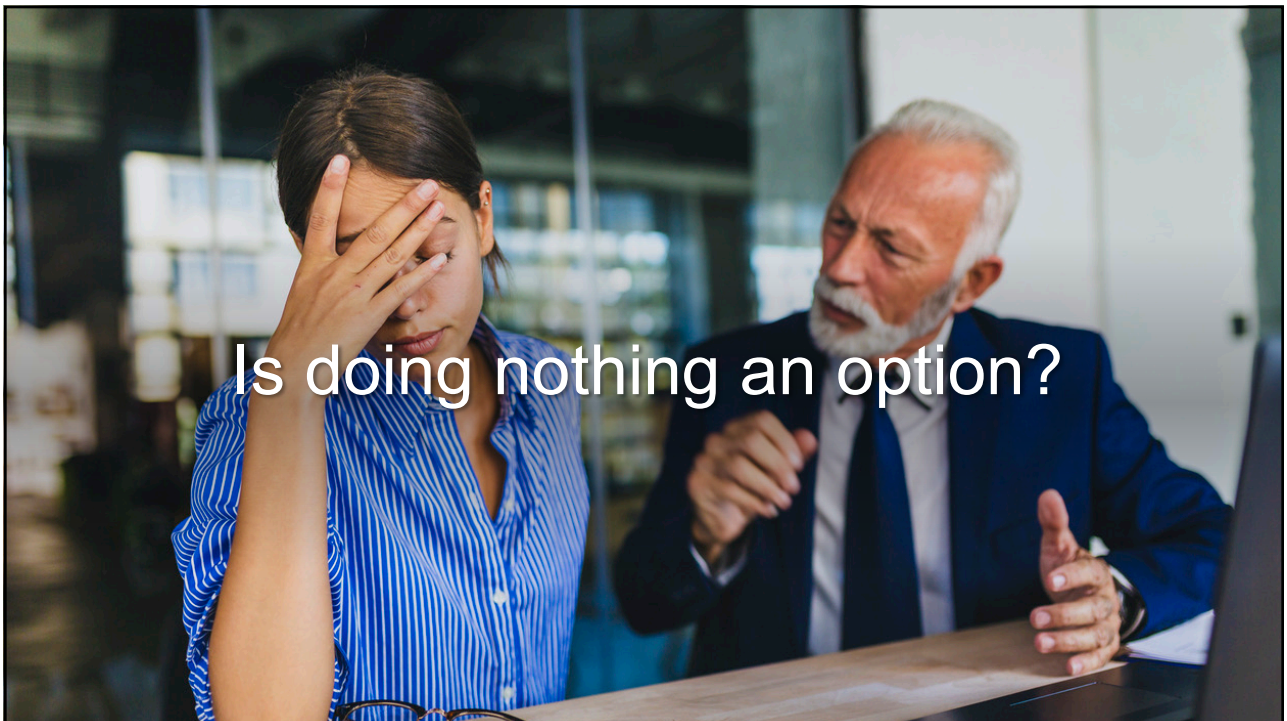
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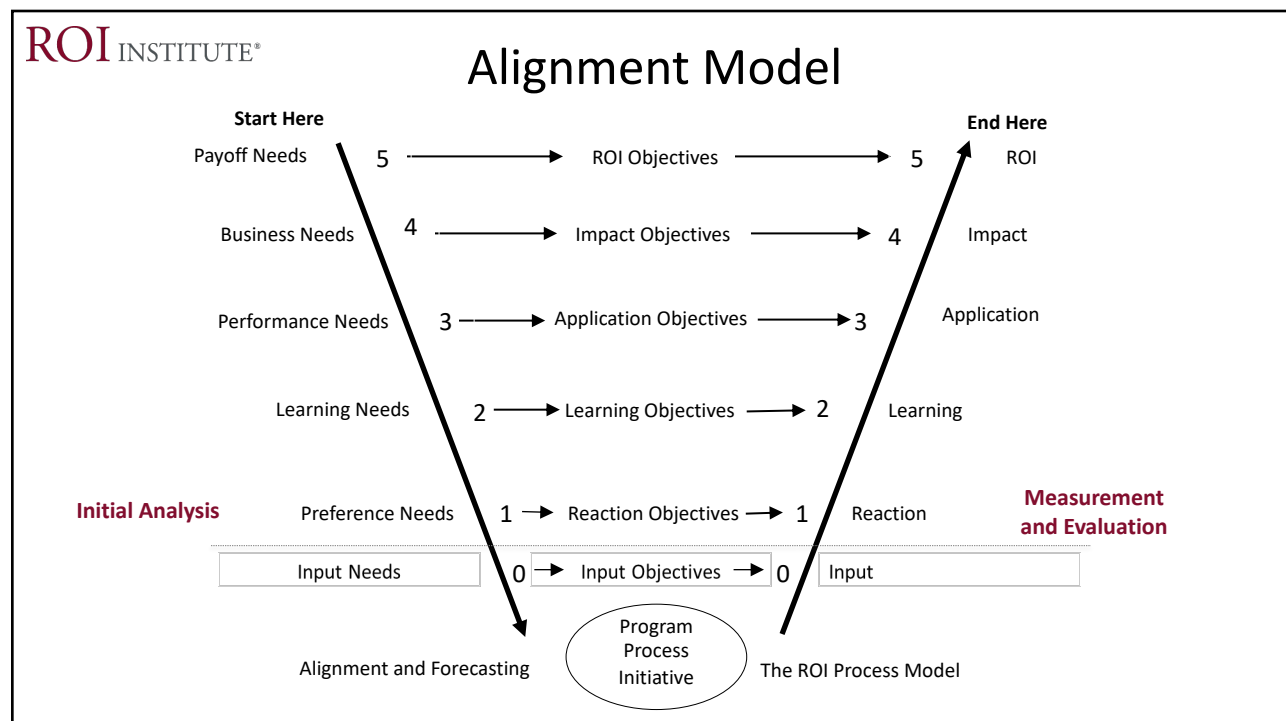
Five-Level Evaluation Framework

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

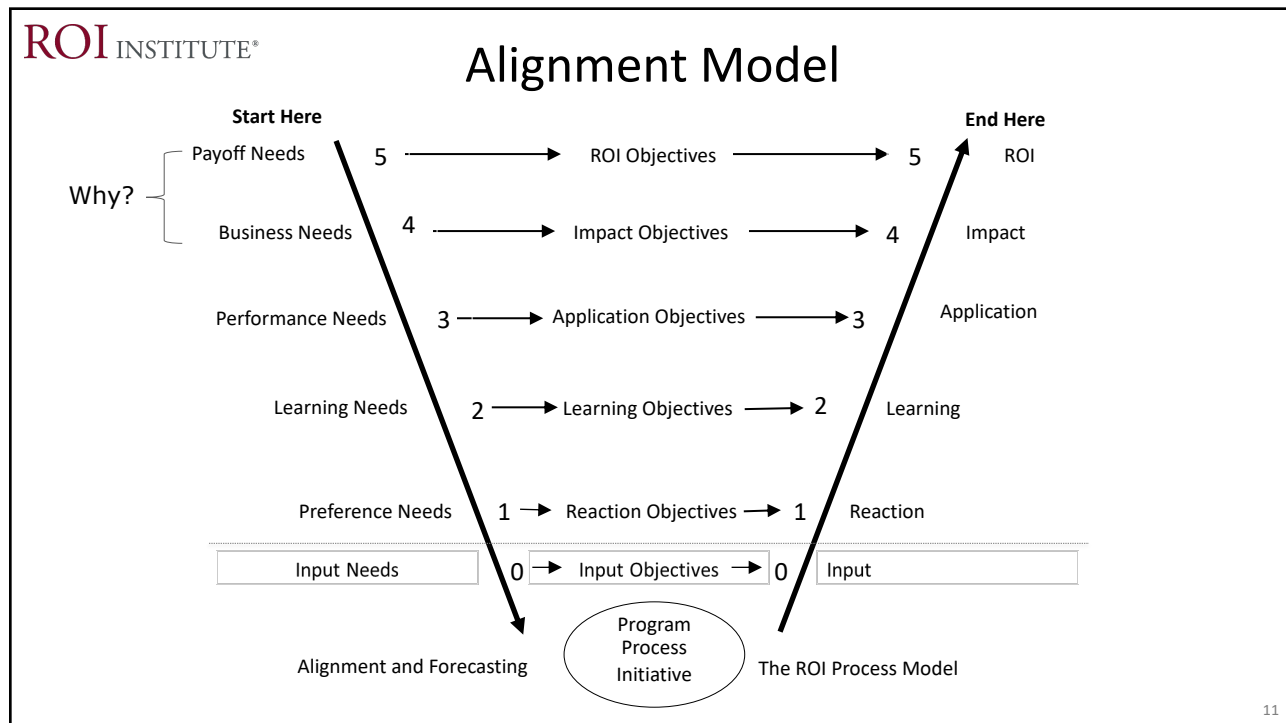
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Katzell developed four steps of training evaluation; Kirkpatrick wrote about four steps of training evaluation; Phillips added economic theory and operationalized the framework by adding process and standards and applying it in practice.

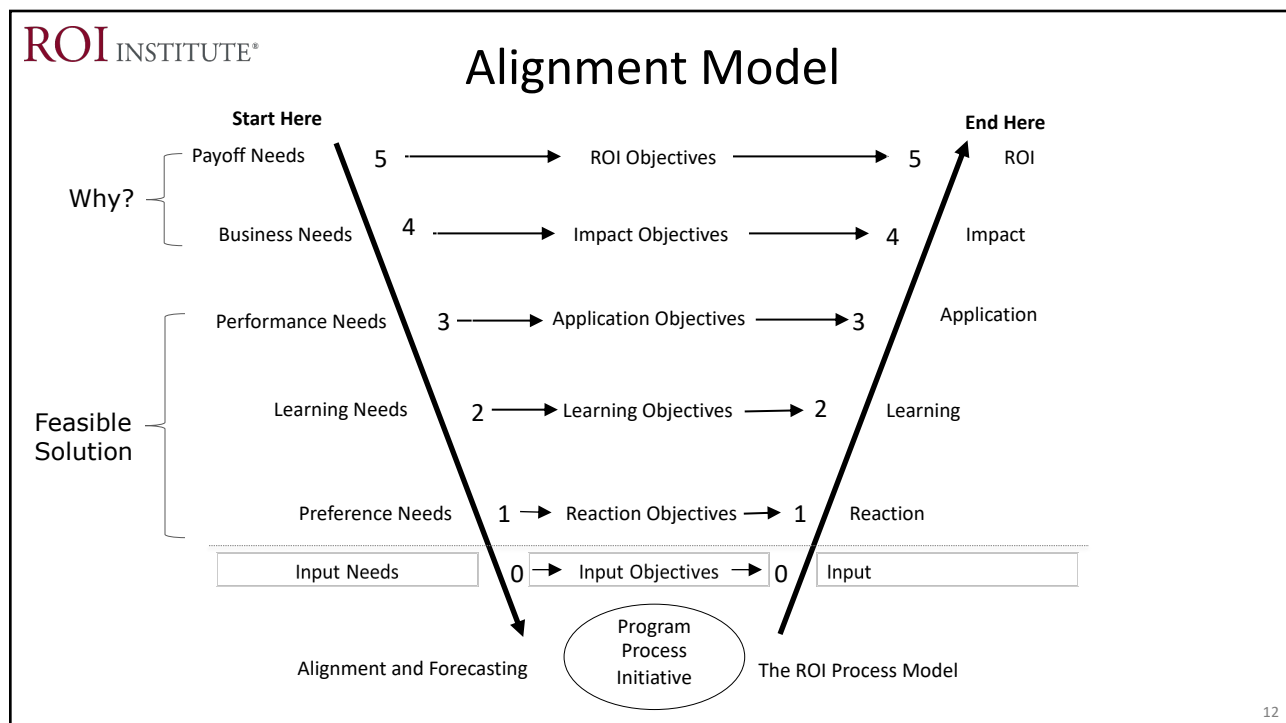
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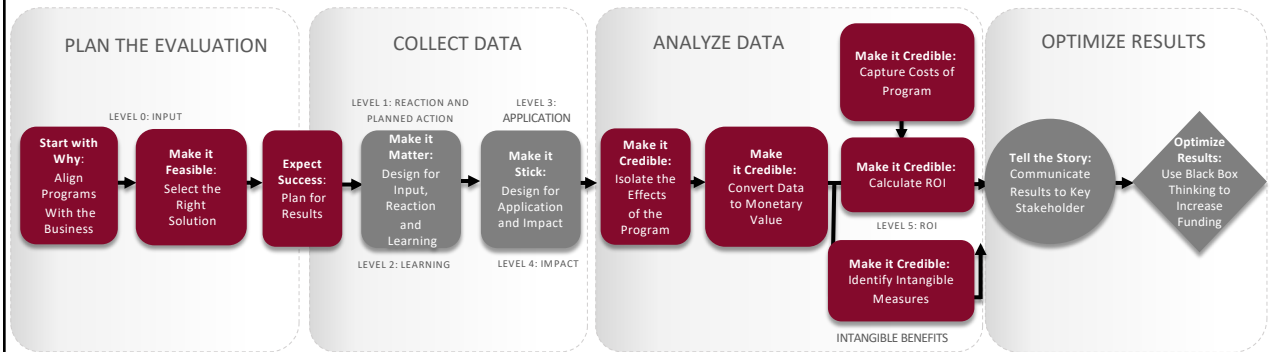
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The ROI Methodology Process Model

Designing for the Delivery of Business Results



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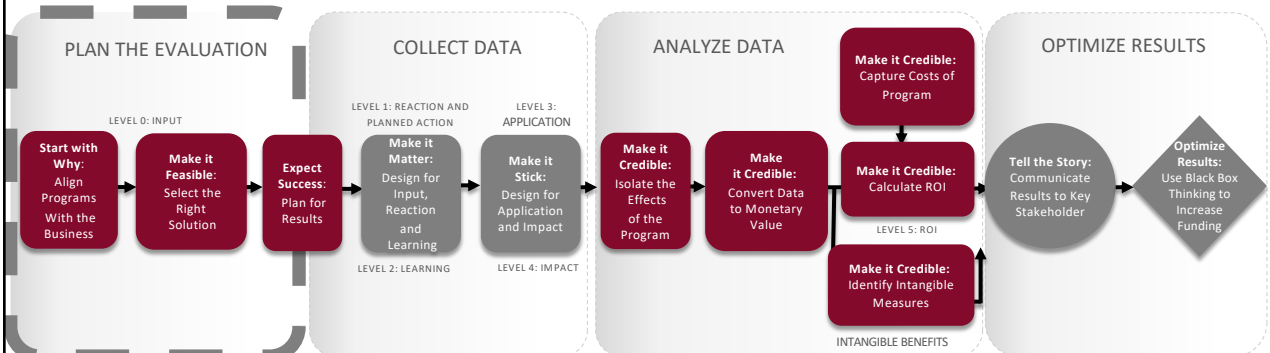
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The ROI Methodology Process Model

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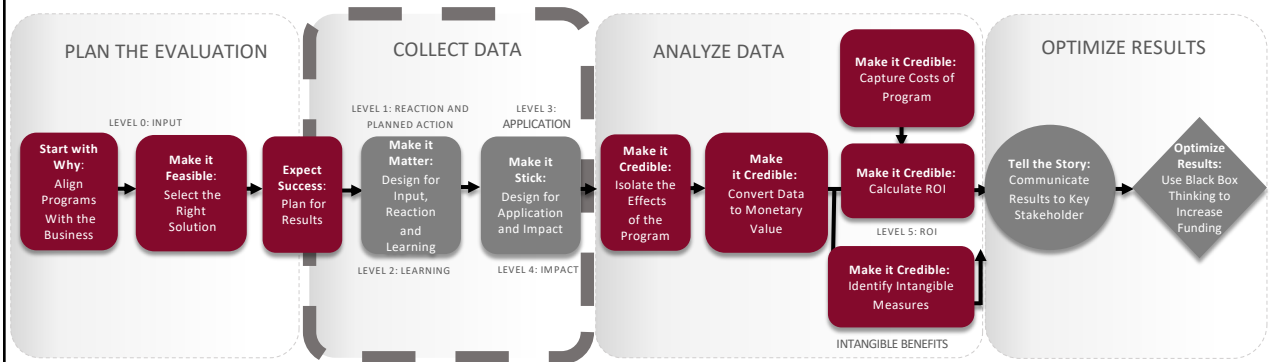
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The ROI Methodology Process Model

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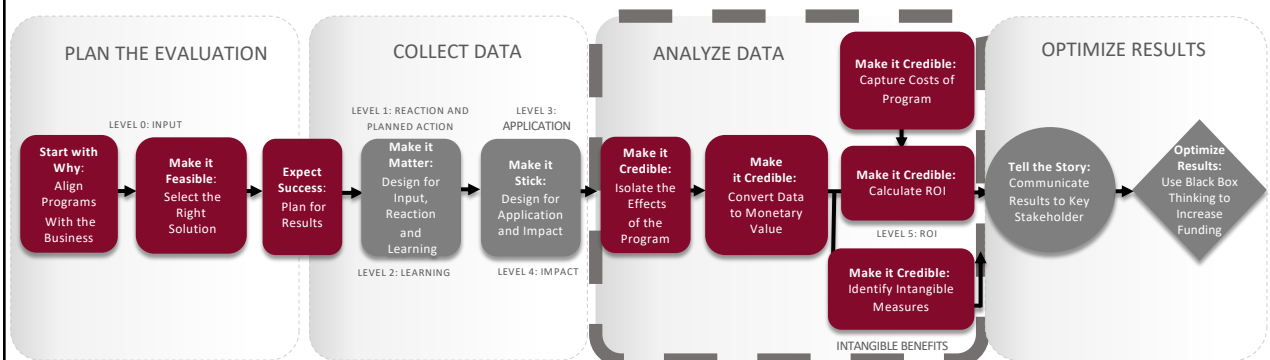
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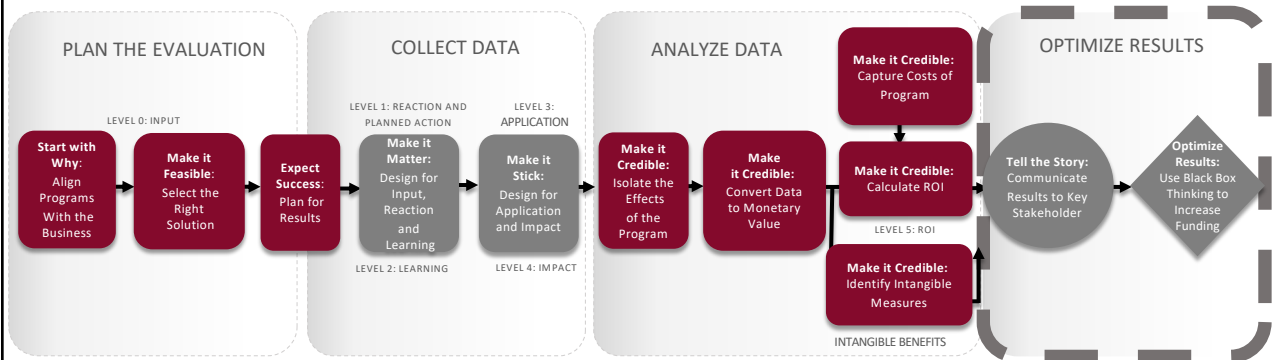
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The ROI Methodology Process Model

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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

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Healthcare Inc.

Program Costs

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- Total Costs: \$277,987

Benefits (Isolated)

- **Complaints**
 - Value of one complaint: \$24,343
 - Prevented over one year: 14.8
 - $14.8 \times \$24,343 = \$360,276.40$
- **Turnover**
 - Value of one turnover statistic: \$20,887
 - Prevented over one year: 136
 - $136 \times \$20,887 = \$2,840,632$

(Complaints + Turnover)

$$\text{ROI} = \frac{(\$360,276.40 + \$2,840,632) - \$277,987}{\$277,987} \times 100 = 1,051\%$$

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With more than 20 years of experience in the learning & development industry, **Kaycee Buckley is Director for Global Commercial 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!

There is value in a negative ROI.

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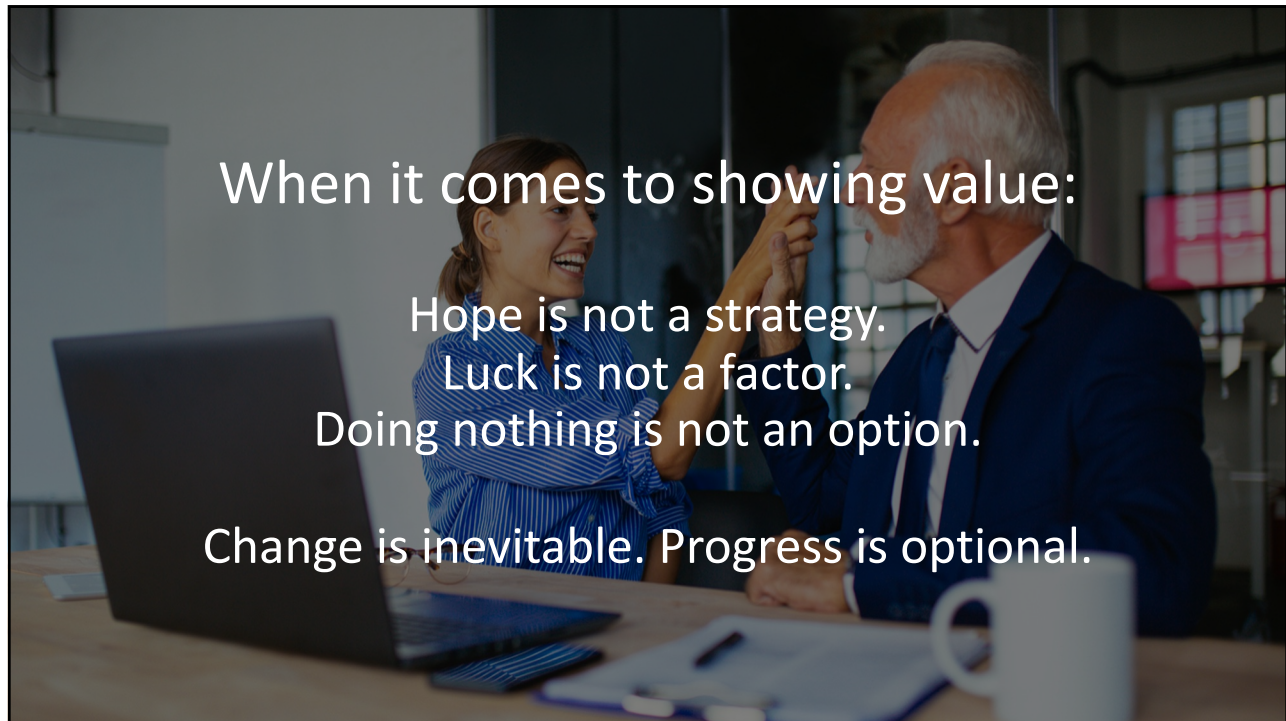
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To Show the Value of What You Do...

- ✓ 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 programs



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Resources

Scan the QR Code to Access Resources from Today's Session

SCAN ME

- The ROI Methodology[®] in 12 Easy Steps
- Effective Leadership in a Hybrid World of Work
- The Alignment Conversation
- Value for Money: Measuring the Return on Non-Capital Investments
- Show the Value of What You Do
- PROVING THE VALUE of LEADERSHIP DEVELOPMENT
- Show the Value of What You Do: Measuring and Achieving Success

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Questions?

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Author of these books and more.

