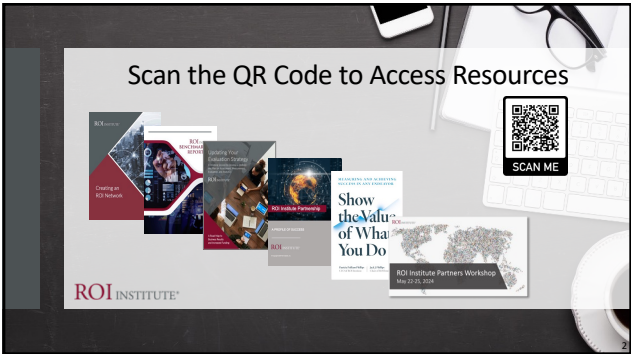
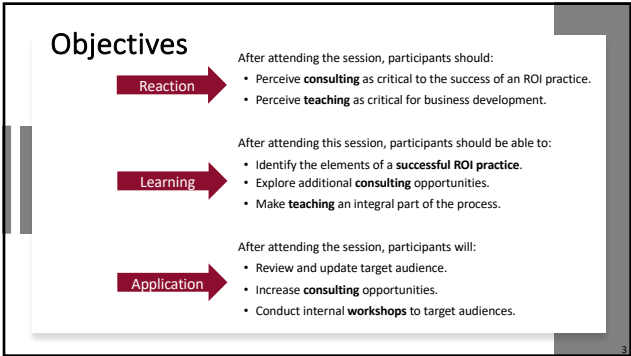




1



2



3

Objectives

Reaction

After attending the session, participants should:

- Perceive **writing** as important for business development.
- Perceive **speaking** as critical to obtaining new clients.
- See **research** as important to the success of the practice.

Learning

After attending this session, participants should be able to:

- Write **articles and blogs** to support the business.
- Book a **speaking engagement** with a proper audience.
- Conduct **important research** to drive the business.

Application

After attending the session, participants will:

- Write at least **two articles** in the next three months.
- Book at least **one speaking engagement** in the next month.
- Initiate a **research project** for your function, profession, or country.
- Will implement at least two new **marketing approaches**.

4

State of the Industry in USA and other Countries



5

State of ROI Institute and Your ROI Practice



6

New Partnerships



5 Moments
of Need[®]
APPLY • CHANGE • SOLVE • NEW • MORE



COGNOTA

7

New People



8

What is IFTDO

The International Federation of Training and Development Organizations is a non-profit, global organization that promotes HRD as a tool to increase personal and organizational effectiveness. IFTDO, founded in Geneva, Switzerland in 1972, has members including HR societies, universities, corporations, government organizations, and enterprises.

IFTDO's mission is to develop and maintain a worldwide network that works to identify, develop, and transfer knowledge, skills, and technology to enhance personal growth, human performance, productivity, and sustainable development



IFTDO
International Federation of
Training and Development
Organizations

9



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IFTDO Membership is Important! Now is Your Time to Join!

Patti Phillips
Chair-Elect,
IFTDO Board

Wafaa Haidamous
Executive Director,
IFTDO Board

Raed Khanfar
Honorary Treasurer,
IFTDO Board

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IFTDO Member Benefits

In addition to a discount to the IFTDO Annual Conferences, access to and use of the IFTDO logo and brand, members have access to:

- Webinars with practitioners and thought-leaders hosted by IFTDO.
- IFTDO LinkedIn Community
- A 50% discount to complete on-demand ROI Certification.

With more to come...

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51st IFTDO World Conference & Exhibition

May 13–15, 2025 | Jakarta, Indonesia
Theme: The Era of Learned Futurist





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What is CTMR

In December 2023, ROI Institute acquired the Center for Talent Reporting's intellectual property. Now called **Center for Talent Measurement and Reporting**, CTMR's vision is to ensure the Talent Development Reporting principles (TDRp) are broadly accepted and widely employed as the world-class reporting standard for all human capital processes.

ROI Institute has supported CTMR since its founding in 2012.
Patti Phillips, aboard member since 2015, board chair since 2016.
Jack Phillips, original executive council member, guided the creation of TDRp in 2010-2012.



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CTMR Benefits

Membership includes:

- Measures Library (more than 700 measures)
- Case Studies
- Sample Statements & Reports (more than 60 statements and reports)
- Workshop Discounts (Through CTMR and ROI Institute)
- Recordings and PowerPoints
- Member's Only Network
- ROI Boot Camp
- Consultation

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Selling ROI

- How to Find Opportunities
- How to Overcome Resistance
- How to Turn Clients Into Fearless Advocates



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Webinar: Elevating Clients to Fierce Advocates: The Power of Post-Sale Mastery

 A link to access this webinar link is in the workshop portal. You will need to register to become a member of SMM, but this is highly recommended to access all their great tools and resources.

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Purpose, Process, Payoff

Purpose

- Create winning strategies to support customer satisfaction and win new business.

Process

- The value of supporting customers after the sale
- 5 keys to supporting customers

Payoff

- Supporting current customers enhances your brand image and is the final step toward increasing your sales.

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5 Keys for Post-Sale Mastery

Assure Satisfaction

Validate Trusted Advisor Role

Gain a Champion

Expand Your Reach

Leverage Corporate Customer Engagement

Make sure everything goes right.
Secure an expression of satisfaction.

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Sales Professional Tips: Gaining a Champion

Track evidence of success for your client.

Co-create a success story to communicate results.

Help your partner share the success story within their organization.

Create opportunities for joint visibility within their industry.

Be specific about their Call to Action.

HELPFUL TIPS

20

Referral Strategy

When

What

How

• After implementation

• After an expression of satisfaction

• Name or introduction to a prospect

• Permission to use their name

• Asking if they know "X" at another company/division

• Connection on social media

• Fact-to-Face

• Phone

• Email, text

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Summary

What happens post-sale impacts your success as much as any other phase of the sales process.

Assure Satisfaction

Build Trust and Advisor Role

Gain a Champion

Expand Your Reach

Leverage Corporate Customer Engagement

Improve the customer's buying experience and your sales performance by doing the following:

Assuring Satisfaction

Becoming a Trusted Advisor

Gaining a Champion

Expanding Your Reach

Leveraging Customer Engagement systems

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Developing Your Expertise

Conduct studies.

Attend ROI Institute webinars.

Participate in ROI Institute training sessions.

Teach ROI.

Speak about ROI.

Write about ROI.

Conduct research about ROI.

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Assumptions

You need to narrowly define your target audience.

Teaching and consulting go together.

You need expertise.

Certification creates promoters.

Consulting is essential.

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Target Industry

The ROI Methodology is used to measure the success of projects, programs, initiatives, systems, procedures, events, and processes in these types of organizations:

- Publicly traded businesses
- Privately held businesses
- Governments (federal, state, and local)
- Nongovernment organizations
- Nonprofits
- Colleges and universities
- Technical institutes

- K-12 school systems
- Foundations
- Charities
- Healthcare organizations
- Networks and alliances
- Associations
- Religious organizations

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Key Questions About Target Audience

- Why do we need a target audience?
- What do you recommend?
- Can I have more than one target group?
- I have a potential client—not in my target group—what should I do?



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Target Function — A Tough Choice

- Human Resources/Human Capital
- Training/Learning/Development
- Leadership/Coaching/Mentoring
- Knowledge Management/Transfer
- Recognition/Incentives/Engagement
- Work Arrangement Systems
- Change Management/Culture
- Talent Management/Retention
- Policies/Procedures/Processes
- Technology/Systems/IT
- Meetings/Events/Conferences
- Marketing/Advertisement/Promotion

- Compliance/Risk Management
- Organization Development/Consulting
- Project Management Solutions
- Quality/Six Sigma/Lean Engineering
- Communications/Public Relations
- Public Policy/Social Programs
- Creativity/Innovation
- Ethics/Integrity
- Safety/Health/Fitness Programs
- Environment/Sustainability
- Faith-Based Programs

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Irritating Questions

1. How many people are certified in your target market?
2. How many ROI studies have you conducted?
3. How much time are you devoting to ROI?
4. What's the profile of workshops you are teaching?
5. What was the last ROI article you wrote?
6. What's the last speech or presentation on ROI you gave?
7. What's your involvement in ROI Network?
8. Have you considered offering an ROI conference?

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Conducting Evaluation Studies

- Finding opportunities
- Who is the real client?
- Convincing the client
- Overcoming obstacles
- Pricing strategies
- Responsibilities: Your team, client
- Planning: process and documents

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Why Consult?

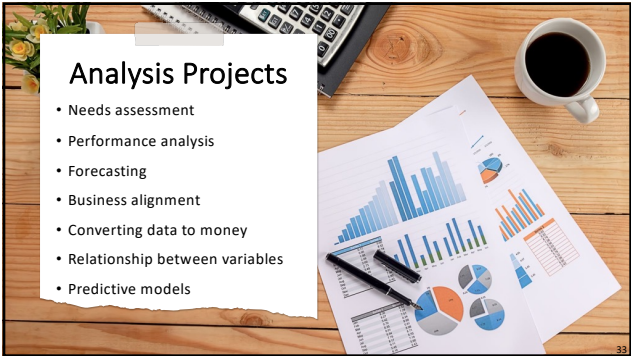
- More revenue
- Build expertise
- Stories for business development
- Stories for teaching
- Basis of writing/speaking
- Case studies



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Analysis Projects

- Needs assessment
- Performance analysis
- Forecasting
- Business alignment
- Converting data to money
- Relationship between variables
- Predictive models



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Finding Opportunities

- Let your audience know.
- Integrate consulting into conversations.
- Integrate consulting into teaching.
- Write about consulting.
- Create special promotions (emails, webinar).
- Create consulting brochure.
- Use case studies.

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Who Is the Real Client?

- Contact
- Interim client
- Ultimate client (wants ROI)

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Overcoming Obstacles

- It's not appropriate to measure at this level.
- It takes too long.
- It's too complicated.
- It's not credible.
- It costs too much.
- What will it look like?
- What will I have to do?
- What happens if it is negative?
- Can we learn with you?

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Planning Tools



Data collection plan



ROI analysis plan



ROI project plan

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Program/Project Objectives

In this column, list the specific objectives for each Level 1-5. Be as specific as possible using SMART objectives.

SMART objectives are:
Specific
Measurable
Achievable
Realistic
Time-based

Measures

In this column, list the measures connected to the objectives. Reaction may be just a 1 to 5 scale. Learning may be a score on a test. Business Impact may be a definition of the impact measure with a particular target to achieve.

Methods for Data Collection

In this column one or more of the following methods may be used for each level:

- Survey
 - Questionnaire
 - Test
 - Interviews
 - Focus groups
 - Observation
 - Action plan
 - Performance monitoring

Sources

Sources are the individuals who are providing the data. In most cases, it is the participants. In other cases, it is the manager of the participant. Still others may be an external source, colleagues, and the actual records of the organization.

Timing

This indicates when this particular data will be collected. For Levels 1 and 2 it is usually during the program or in the early part of the program. For Levels 3 and 4, it depends on when the lead time for application and ideal time for impact.

Responsibilities

This is the individual or individuals who will be collecting the data. For Levels 1 and 2 it is sometimes the facilitator or organizer. For Levels 3 and 4, it could be the evaluation staff or some other individual who is assigned that responsibility.

Data Collection Plan: Purpose of the Evaluation

Level	Assessment/Outcome	Measures	Methods for Data Collection	Sources	Timing	Responsibilities
1	Reaction					
2	Learning					
3	Behavior Change					
4	Business Impact					
5	ROI					

ROI Institute

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Data Items

This is normal Level 4 data items and would match the same data on the data collection plan for impact objectives and measures.

Methods for Isolating the Effects of the Program

One or more of the following methods will be used to isolate the effects of the program:

- Control Groups
- Pretest/Posttest
- Analysis
- Randomized Methods
- Participant Estimates of Impact
- Supervisor's estimate of impact
- Manager's estimate of impact
- Supervisor or manager estimation
- Use of experts' previous studies
- Calculate or estimate the impact of other factors
- Customer input

Converting Data to Money

One or more of the following methods will be used:

- Profit/lossings from output
- Cost of quality
- Employee compensation
- Historical cost savings
- Expert input
- External studies
- Looking with other measures
- Participants estimation
- Supervisor or manager estimation
- Staff estimation

Cost Categories

These costs are normally the same from one project to another but can vary depending on specific cost items. These cost categories are:

- Cost to research, design, and develop/purchase solution components (person)
- Costs of materials for the solution (object)
- Cost of facilitator, specialist, and/or coordinator
- Facilities costs for design and implementation staff (meetings and training)
- Traveling/boarding costs for design and training
- First cost (performer's salaries and benefits) (ongoing meetings for kick-off, implementation, training)
- Administrative/overhead costs related to the project (salaries)
- Evaluation costs

Intangible Benefits

In this column list the intangible benefits that may be linked to the program but will not be converted to money. These cannot be converted to money credits with a reasonable amount of resources, so they will be left as intangibles. For example: Engagement, Customer satisfaction, Reputation, Image, Brand.

Communication Targets for the Final Report

These are the individuals and groups who will receive the information when the study is completed. They will be typed for:

- Owner/leader
- Managers of participants
- Participants
- The colleagues in the functional area
- As well as many other possibilities

Other Influences

This is the place to indicate anything that might be going on at the same time that could affect the evaluation project. There are here for reviewers only.

Comments

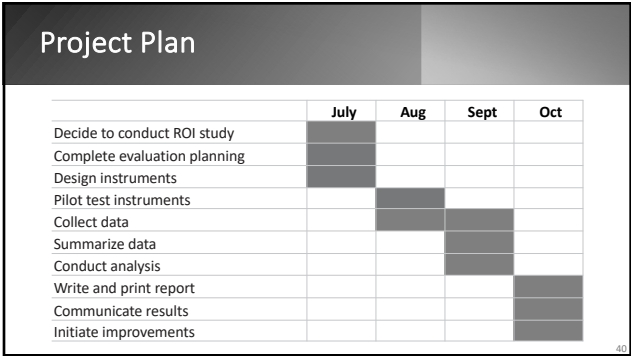
This place is for any comments and notes that might be helpful, or need to be taken specific action etc.

ROI Analysis Plan

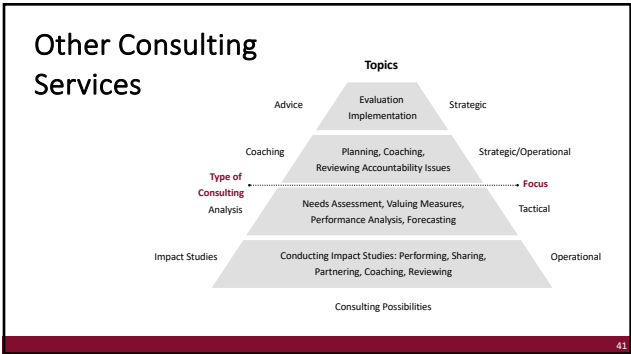
Level	Assessment/Outcome	Measures	Methods for Data Collection	Sources	Timing	Responsibilities	Cost Categories	Intangible Benefits	Communication Targets for the Final Report	Other Influences	Comments
1	Reaction										
2	Learning										
3	Behavior Change										
4	Business Impact										
5	ROI										

ROI Institute

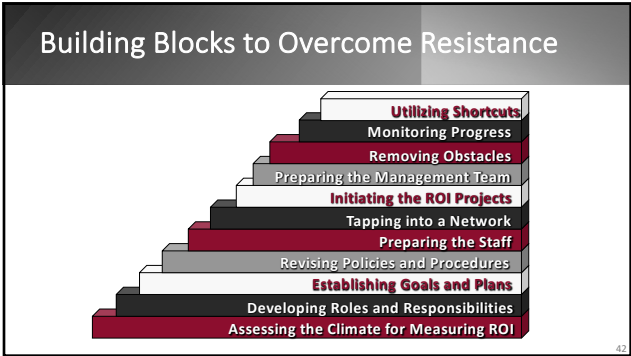
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Evaluation Strategy Planning

- Need now because of pandemic
- Share responsibilities
- Use Design Thinking principles
- Teaching and consulting (1-2 days)
- Evaluation strategy plan is an outcome



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Objectives
After participating in this session, participants will:

1. Recognize this session as important to the success of their role.
2. Describe the challenges facing the organization today and the need to connect to business value, desired by top executives.
3. Decide on specific actions needed for an evaluation strategy.
4. Create an evaluation strategy plan document.
5. Internalize the evaluation strategy plan and be prepared to make it successful.
6. Execute the strategy and monitor successes.

Deliverables
This session will deliver:

1. An engaged team development process
2. A reference library of books, resources, and tools
3. An evaluation strategy plan

Evaluation Strategy Planning Session

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Collaboration

Performing

The consultant develops the project independently of the client and presents the study results.

Sharing

There is a sharing of information along the way, so the consultant is routinely communicating, providing feedback, and explaining the methodology to the client.

Partnering

The consultant partners with the client to jointly conduct the study, each with respective duties and responsibilities.

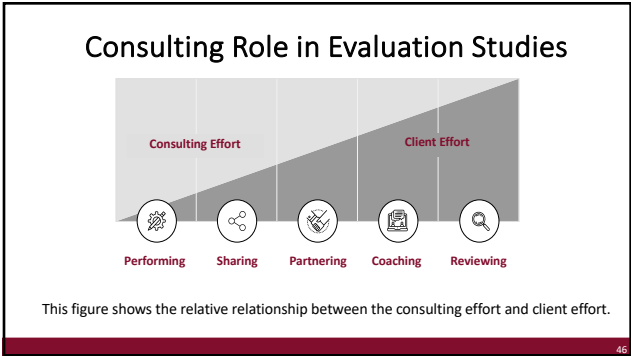
Coaching

The consultant coaches the client as they conduct the study through different steps of the process.

Reviewing

The consultant reviews the study after its completion by the client.

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Pricing Strategies

- Lump sum —fixed amount
- Hourly rate with a cap
- Coaching
- Collaboration with client
- Most yield about US \$25,000

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48



Why Teach ROI?

- Builds your expertise.
- Create awareness with clients.
- Secures new clients.
- Creates fans and supporters.
- Develops smart clients.
- Drives your consulting practice.

49

ROI Workshops

- Topic
- Audience (should be your target)
- Duration
- Price
- Format/medium
- Internal versus open enrollment
- Books and materials



50



Success Factors for Workshops

- Keep it relevant
- Relate to their issues
- Keep them involved and engaged
- Know your material
- Plan the next steps
- Plan to follow up

51



Hot Topics Now

- Proving the Value of Leadership Development
- Measuring the Success of Virtual Learning
- Proving the Value of Soft Skills
- Making the Business Case: Forecasting ROI
- ROI on a Shoestring
- Evaluation Strategy Planning

52



Ways To Become Certified

• In person	• Self-Study
• Live Virtual	• Coaching Approach
• On-Demand	

53



Certification Strategy

- Do you teach it now?
- Do you want to teach it? If not, what's your plan to get clients certified?

54

Peer Problem-Solving

- How to increase ROI Certification attendance
- How to get more people certified
- How to get in-person sessions back
- How to customize certification to your audience



55

Writing



56

Writing Possibilities

- Blogs
- Articles
- Case studies
- Briefing papers
- Books



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Why Write Blog and Articles

- Builds expertise
- Builds credibility
- Connects you to the ROI Methodology
- Connects you to ROI Institute
- Builds your brand
- Creates clients (end with an offer/call to action)
- Spreads your message about ROI
- Builds collateral material
- To win an award

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Article and Blog Topics

Fundamentals

- "How To Measure ROI"
- "The Key Steps to Create Value"

One Or Two Steps In The Model

- "Aligning Soft Skills to the Business"
- "How to Improve Data Collection"

A Challenge Area

- "Converting Happiness to Money"
- "Five Moments of Truth"

Case Study

- "Safety Training Delivers High ROI"
- "Unconscious Bias Program Has Big Impact"

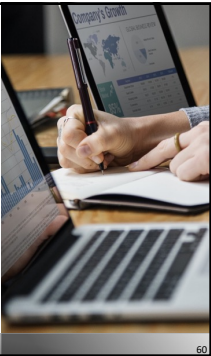
Application

- "Use Of ROI Increases Investment in Leadership Development"
- "ROI Study Saves Tuition Refund Program"
- "Negative ROI Case Brings Important Changes to Coaching Program"

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How to Select a Topic

- Clients are asking for it.
- It's discussed in the literature.
- It's a barrier to ROI use.
- It comes up in client conversations.
- Your research shows it.
- It's something the audience needs.
- It's a success story.



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How to Get Started

” Locate publisher.

Check guidelines for submission.

Use resources. (Check ROI partners website.

Use books and case studies.

Set aside time to do it.

Enjoy the outcome.

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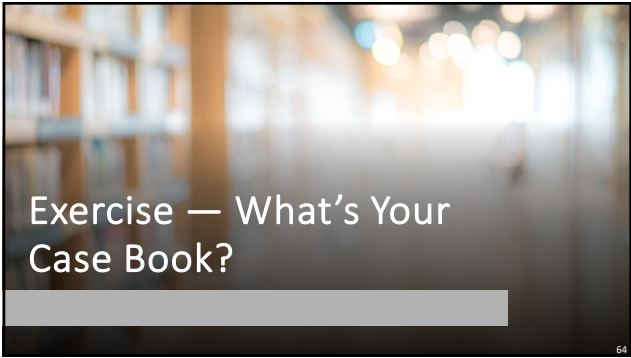
Exercise — What’s Your Next Article

62

You Need Case Studies to:

- Validate this methodology in a client organization.
- Create an awesome experience with the client.
- Recognize clients.
- Use in teaching ROI.
- Use in business development.
- Build a book of case studies.

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Exercise — What’s Your Case Book?

64

How About a Book?

- Builds credibility
- Builds expertise
- Creates clients
- Create speaking opportunities
- Is used as a reference in teaching ROI

Consider a co-author arrangement.



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A Book Should Connect to:

The ROI Methodology

Your target audience

Your clients

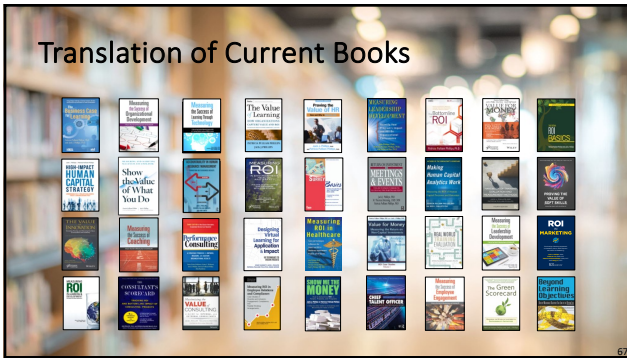
Your professional field

Your language

Your culture and country

66

Translation of Current Books



67

[illegible]

Publishing Formats

- Traditional
- Self-published
- Hybrid

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ROI – MEASURING THE ROI OF TRAINING, HR & TECHNOLOGY INVESTMENTS BOOK IN TR & ENG

• The first book in Turkish on ROI of getting the hard data from soft ones. We are now translating it into English with the stories in

• I am thankful and respectful to Jack & Patricia Phillips for the ROI knowledge I have learnt from them & to Melissa Brown for her support.

• If you write to Yeikta.Ozozen@SurekiliGelisim.com.tr or +90 532 584 14 01 Whatsapp, (after publ the book in Eng) I can help you to publish the book to publish it in your local language together with you, having your name among co-writers ie in Español, Italiano, en Français (French), Arabic, Nihongo (Japanese), Русский (Russky) etc & customize it to your local companies.

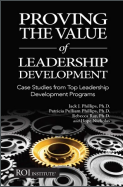


69



- Relatable**
It's full of stories and examples representing a broad range of settings.
- Methodical**
This book will show you how to measure and improve the success of your work in six easy steps.
- Accountable**
It's a process that will help you design for, deliver, and measure success.

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- Applicable**
Practical examples and insights into successful initiatives in different organizations.
- Focused**
Explore strategies for measuring success of leadership programs on organizational performance and bottom-line results.
- Actionable**
Gain actionable insights and best practices for designing, implementing, and evaluating your programs.

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- Proven**
This book presents a process based on over 40 years of development and refined to meet the demands facing training and performance improvement functions.
- User-Friendly**
This book will show you how to measure, prove and improve the success of your program at five levels of outcomes using 12 steps.
- Practical**
It's a guide for practitioners, managers, leaders, and students—perfect for use in the classroom to teach ROI and the value of projects and programs.

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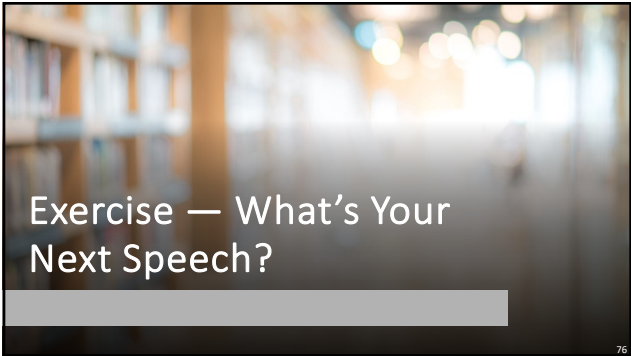
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Research Topics

- Status of measurement/evaluation in your field
- Status of measurement/evaluation in your industry
- Status of measurement/evaluation in your country
- Status of ROI users

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Exercise — What’s Your Next Research Project?

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Telling Your Story

- Defining Your Audience
- Having a Conversation
- Marketing Collateral
- ROI Network
- ROI Conference
- Referrals



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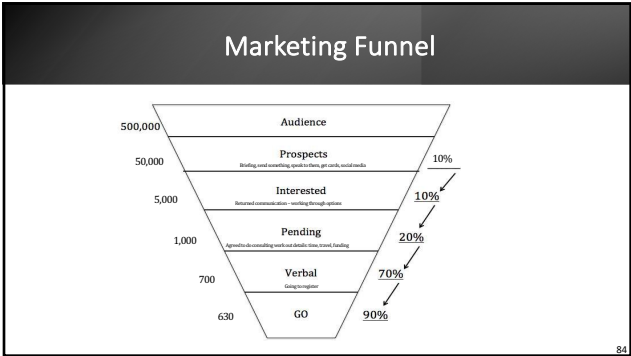


Creating Engagement/Interest

- Digital marketing
- Print ads
- Promotions
- Customer events
- Brochures
- Specialty advertising
- Mobile apps
- Direct mail
- Newsletters

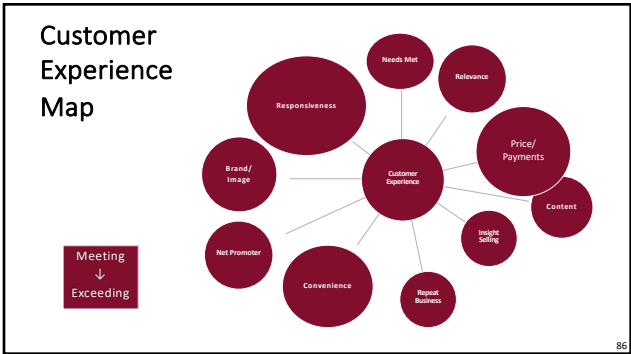
- Exhibits
- Product briefings
- Webinars
- Customer incentives
- Social media
- Email marketing
- Referrals
- Sponsorships
- Campaigns

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ROI Institute Awards

- Best ROI/Impact Study
- Best ROI Forecast
- Best Research
- Best Published Case Study
- Best Practice Implementation
- Most Innovative Approach to ROI
- Best Published ROI Article
- ROI Practitioner of the Year
- Best International Implementation
- Best Supply Partner
- Best Social Impact
- Best ROI Certification Host



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ROI Measurement: Fact, Fad, or Fantasy

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About the ROI Estimator

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Peer Problem-Solving

- How to increase your expertise
- How to grow ROI business
- How to generate projects and/or teaching engagements



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Train the Trainer



92

Teaching Tips

- Teaching Tips
- Use of Cases
- Lecture vs Discussion
- Storytelling



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Certification Issues

✓ Pricing

👤 Getting people certified

👥 If you don't have many people certified, you won't be successful.

📄 Most of your clients will be from those who attend certification.

🖥️ Virtual presentations

🌐 Who conducts it?

94

Prework

- Identify a project or program for ROI evaluation
- Prepare for the basics

Comprehensive Learning Course

- Multiple days of content-rich, interactive sessions
- The focus is on your project evaluation

Workbook and Materials

- A valuable 300-page, action-oriented workbook
- Several books to use as references
- Job aids, tools, templates

Resources

- Lifetime membership to ROI Network
- One-year membership to Center for Talent Measurement and Reporting

- Access to tools, templates, case studies, job aids, reports, and other resources

Virtual Assistance

- Weekly group coaching sessions
- Receive support and feedback for your ROI evaluation
- Review and approval of your ROI study

Right to Use Materials Internally

- You have the right to reproduce our materials and use internally with your clients and colleagues

Certified ROI Professional (CRP) Designation

- A unique, sought-after credential
- Digital badge

Certification Components

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Delivery Options for ROI Certification

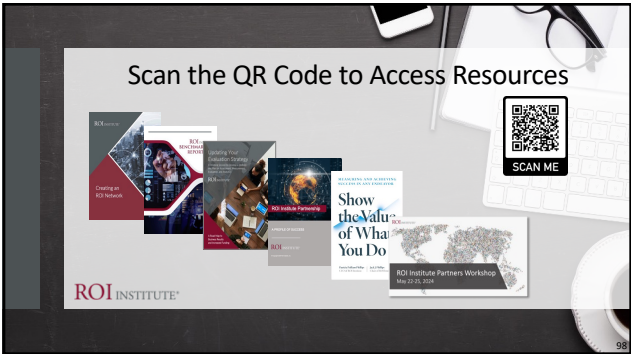
- In person
- Virtual-asynchronous
- Virtual-live
- Blended
- Self-study
- Coaching
- Internal
- Open enrollment
- Partner with us
- Specialized versions
- Different language versions

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