

Partners Workshop Agenda

Thursday, May 23, 2024

8:30 am — Welcome & Introduction

- Agenda and Expectations
- State of the Industry in USA and other Countries
- State of ROI Institute and Your ROI Practice

SELLING ROI

- How to Find Opportunities
- How to Overcome Resistance
- Elevating Clients to Fierce Advocates
- Developing Your Expertise
- Defining Target Market

Why ROI and Why ROI Institute: Executive Briefing on ROI

Irritating Questions

CONSULTING: The No. 1 Revenue Generator

- Conducting ROI Studies
- Evaluation Strategy Plan
- Ethics/Guidelines
- Proposals and Pricing

LUNCH

TEACHING ROI: The No. 2 Revenue Generator

- ROI Workshops
- Teaching Tips
- Ways to Become Certified
- Certification Strategy

Klaas Toes Presentation

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

Friday, May 24, 2024

8:30 am — WRITING: Your Credibility Builder

- Blogs, Articles, Briefing Papers
- Exercise — What's Your Next Article
- Case Studies
- Exercise — What's Your Case Book?
- Books: Developing a Book Proposal/Publishing Options
- Translation of Current Book

SPEAKING: Business Development Opportunity

- Purpose, Duration, Audience
- Where to Speak?
- Exercise — What's Your Next Speech?

RESEARCH: Projects, Process, and Plans

- Benchmark Studies
- Status of Evaluation
- Customized Projects
- Research Tools, Qualtrics
- Exercise — What's your Next Research Project?

LUNCH

MARKETING: Telling Your Story

- Defining Your Audience
- Having a Conversation
- Creating Engagement/Interest
 - Webinars & Briefings
 - Social Media Marketing
 - Email Campaigns
- Marketing Collateral
- ROI Network/ROI Conference
- Referrals
- Sharing Ideas: Your Best Marketing Success

ROI Institute Awards

- Need More Partner Submissions
- Great for Establishing Credibility
- Ideal for Marketing
- Help Your Clients Submit

FACT, FAD, FANTASY PRESENTATION

ROI ESTIMATOR EXERCISE

- Bring a program that you would like to estimate the ROI and see how the tool is used.
- Learn how to use this tool with clients.

PEER PROBLEM-SOLVING (mixed group of new & old)/Hackathon

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

Saturday, May 25, 2024

8:30 am-5:00 pm — TRAIN THE TRAINER

For those already teaching, or who want to teach ROI Certification, we will look at the new materials, review new case studies, discuss potential questions and issues.

Topics Covered

- Use of Cases
- Storytelling
- Lecture vs Discussion
- How to Get More People Certified

Using the most recent ROI Certification materials, this session will involve a careful review of each module with these issues in mind:

1. What are the must-teach exercises to use
2. What are the takeaways from each module
3. When/How to use other exercises in each module (assuming you don't have time for all)

The purpose of this session is to ensure we are all using the same updated materials, are consistent in our teaching methods (although we have different styles and approaches) and are guiding people into completing their ROI Certification project.