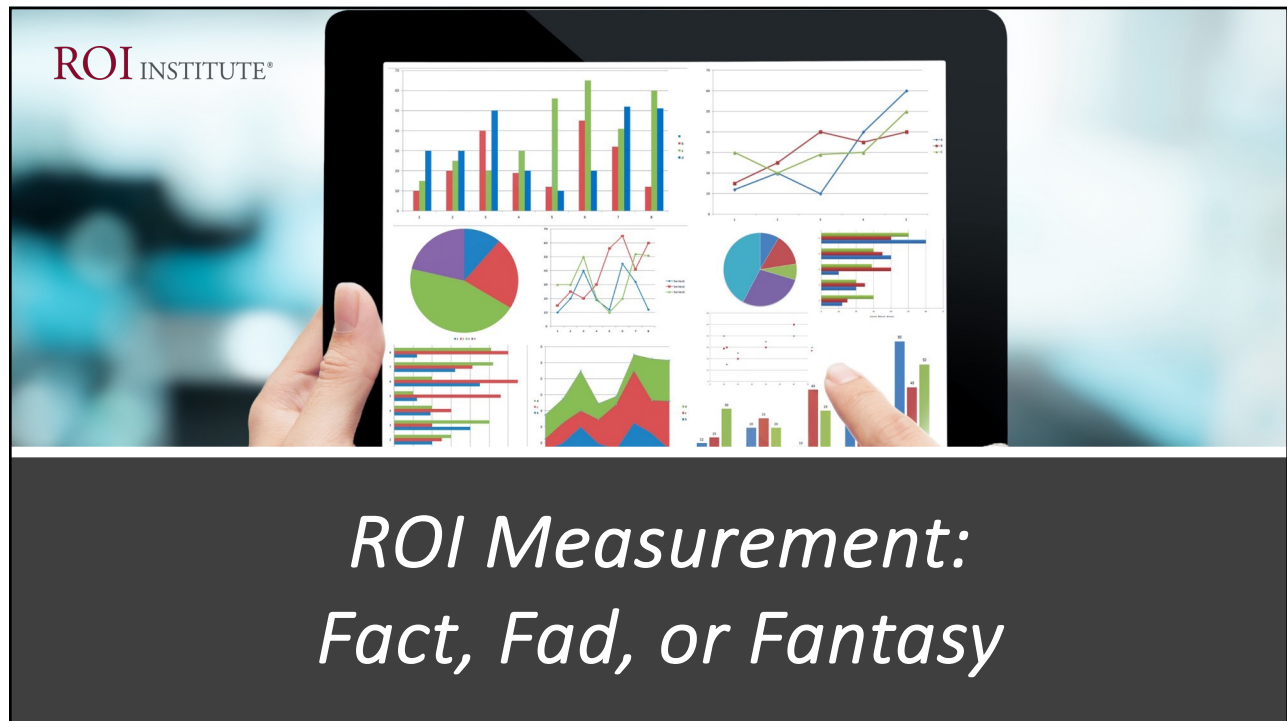
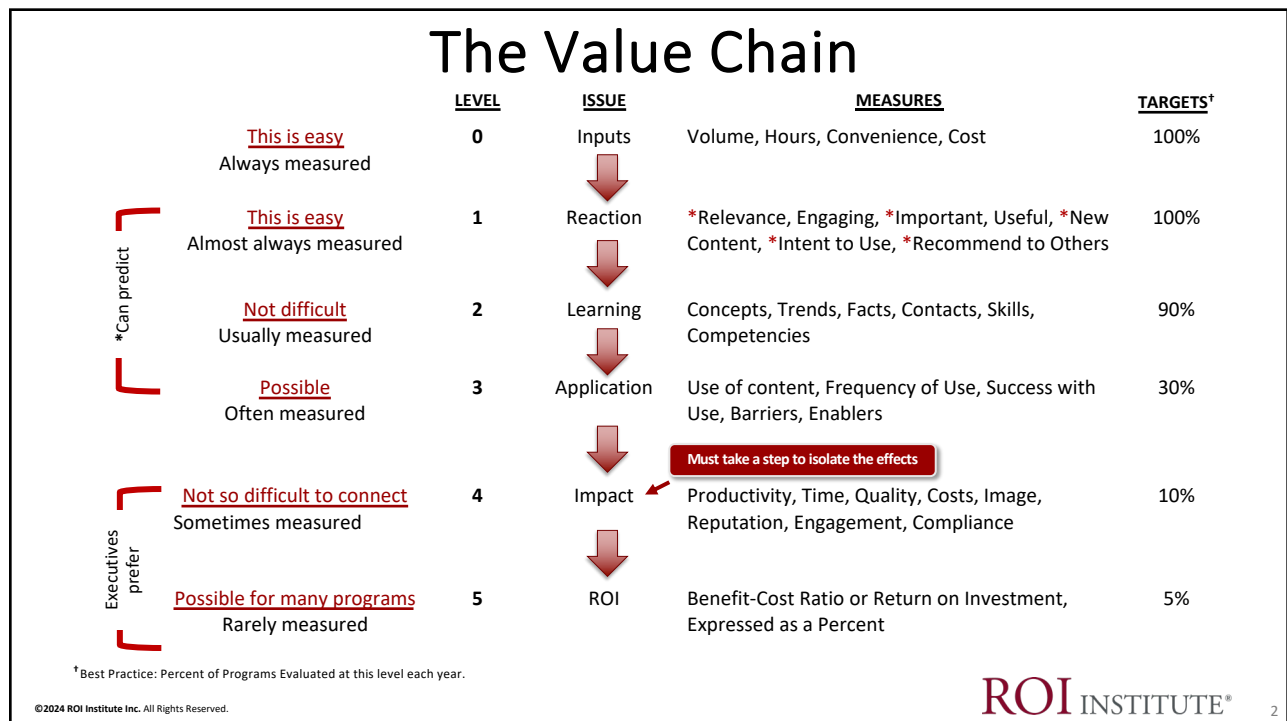




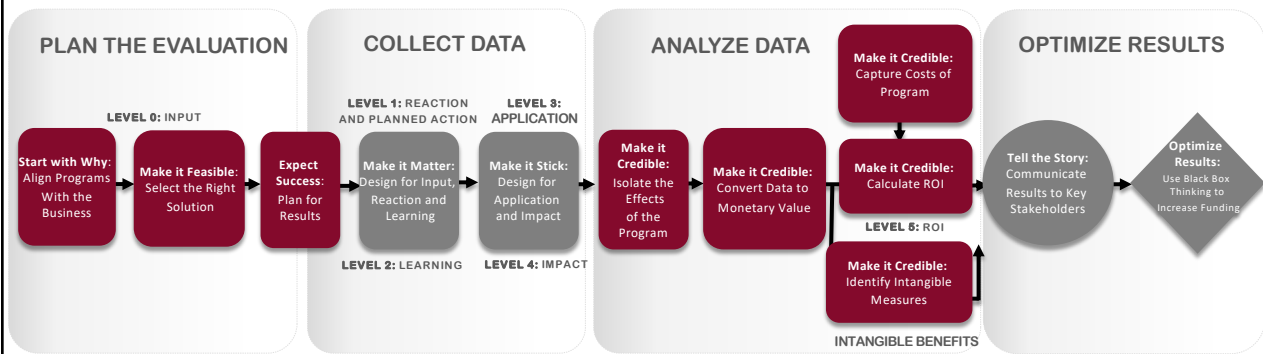
1



2

The ROI Methodology Process Model

Designing for the Delivery of Business Results



© 2024 ROI Institute Inc. All Rights Reserved.

ROI INSTITUTE®

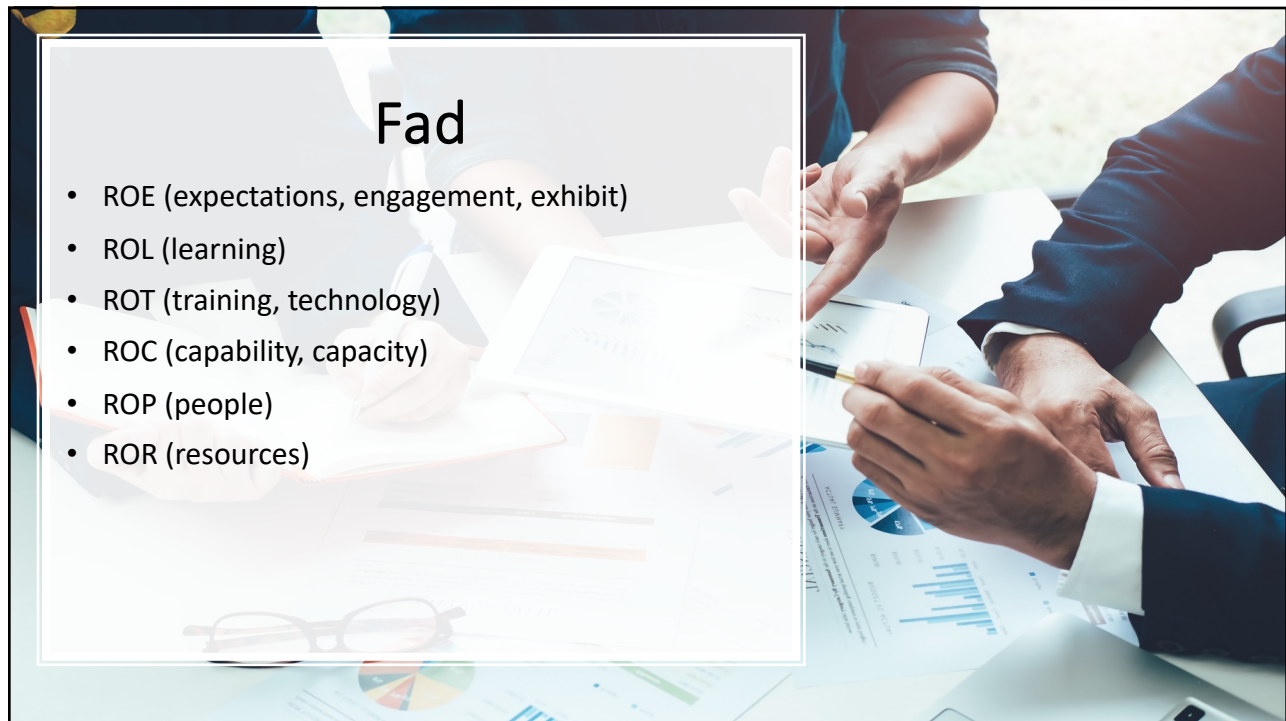
3

ROI Methodology Timeline

Creation

- First Study – 1973, Lockheed
- First Publication – 1975, Journal of Cooperative Education
- First Book – 1983, Gulf Publishing
- First Industry Award – 1986, SHRM
- First One-Day Workshop – 1991, Birmingham, AL
- First Two-Day Workshop – 1992, Johannesburg, SA
- First Case Book – 1994, Best Seller
- First ROI Certification – 1995, Nashville, TN

4



Fad

- ROE (expectations, engagement, exhibit)
- ROL (learning)
- ROT (training, technology)
- ROC (capability, capacity)
- ROP (people)
- ROR (resources)

5



Fantasy

- “The Value of Learning is best.”
- “My top executives don’t want to see ROI.”
- “I’m not measuring at ROI level until I’m forced to.”
- “Return on inspiration (ROI)”
- “Return on wows (ROW)”
- “Beyond ROI”
- “ROI on soft skills is impossible.”
- “Return on objectives (ROO)”

6



ROI Facts

- Implemented in over 70 countries
- Most used evaluation system in the world
- Endorsed by United Nations with a UN General Assembly resolution in 2008
- Endorsed by 30 federal governments
- Used by over 300 health care systems
- Used by over 150 colleges and universities
- Used by three-fourths of Fortune 500 organizations
- Used by 40 of the top 50 Best Managed Companies
- Used by major foundations such as the Gates Foundation
- Supported by over 75 books in 38 languages
- Over 400 published case studies
- Implemented in all 14 types of organizations, from businesses to government, nonprofits, and school systems.
- Used in 22 professional fields ranging from learning and development to innovation and public relations.

7



**Measurement
Targets**

*Benchmarking Percentages

Level	Recommended % of Programs	**Benchmarking %
0 Input	100%	100%
1 Reaction	100%	80%
2 Learning	80-90%	70%
3 Application	30%	49%
4 Impact	10%	37%
5 ROI	5%	18%

*Percentage of programs evaluated at each level each year

**Benchmarking 2020

8

ROI Must Be Credible

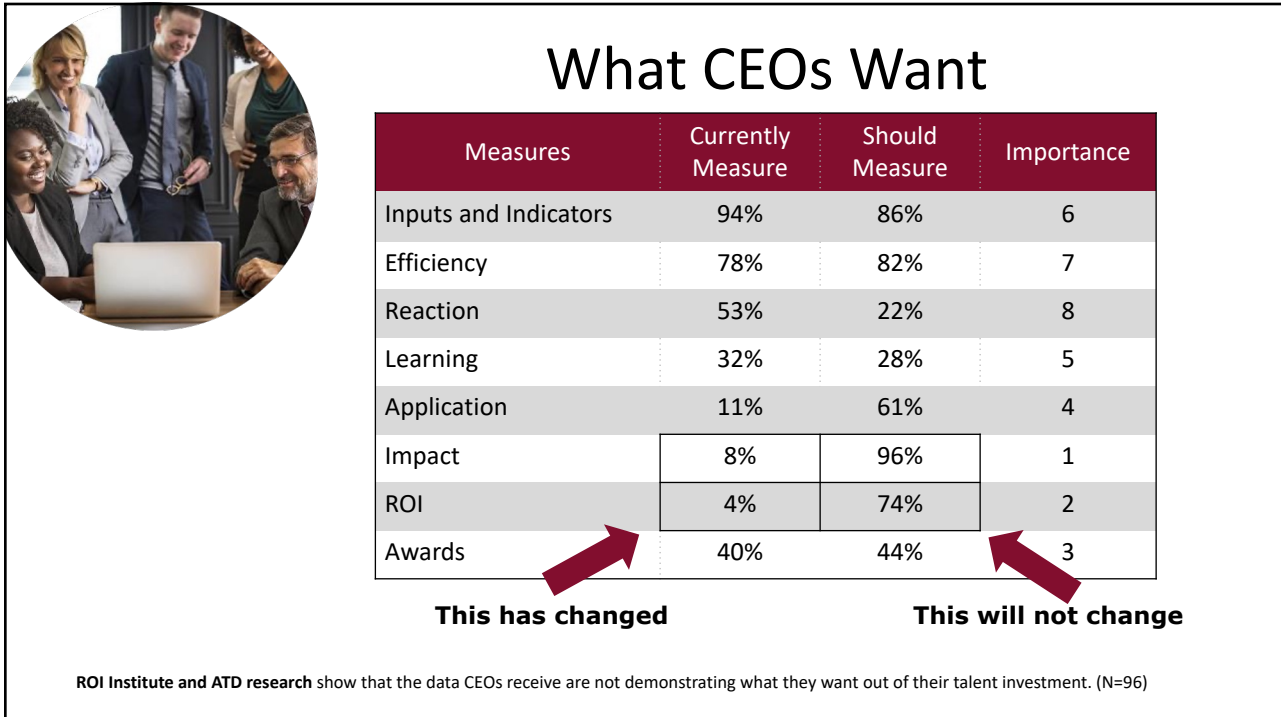
- Data should come from credible sources.
- Assumptions are transparent.
- Assumptions are conservative.
- The effects of the program should be isolated from other influences.
- Missing impact data has no value.
- Extreme data are omitted.
- Unsupported claims are omitted.
- All direct and indirect costs are included in the analysis.
- Estimates are adjusted for potential errors in the estimate.

9

ROI Myths

- No one is using ROI.
- ROI takes too long.
- ROI is too complicated.
- ROI is too difficult.
- ROI is inappropriate.
- ROI is not needed.
- ROI can be used with only 5% of programs.
- ROI is too subjective.
- ROI is for post-analysis only.

10



11



Questions?

Visit us Online

www.roiinstitute.net

Email Us

info@roiinstitute.net

Connect with Us



12