

Proving Value in Top Leadership Development Programs (Case Studies)



May 20, 2024, 4:30 pm CST



Meet Your Speakers



Deborah Masak, CRP
Vice President of Global Talent & Inclusion, First Advantage



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President and Chief Learning Officer, BAS2A



Sulaiman Hamed Al Ghafri
Learning & Development Expert
Oil & Gas Sector



Patti P. Phillips, Ph.D., CPTD
CEO, ROI Institute, Inc.

An abstract, colorful pattern of various shapes and colors (red, blue, green, yellow, purple) is visible in the background of the slide header.

Objectives

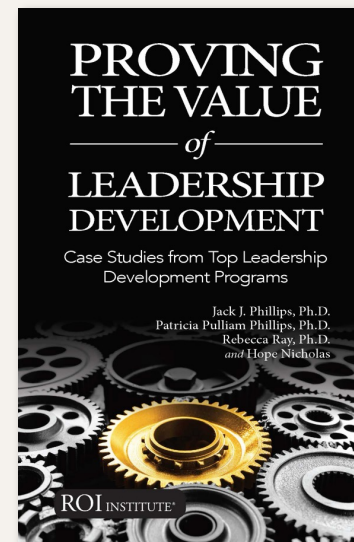
After attending this session, you should be able to:

- **Understand the need to show impact and ROI for major programs.**
- **Design leadership development programs to deliver impact and ROI.**
- **Explain how to measure program results at all five levels of outcomes.**

About the Book

Proving the Value of Leadership Development will show you how to measure the value of leadership development programs through detailed case study examples that illustrate how to measure and evaluate different leadership programs and initiatives.

Meet us in the ATD Store at 5:30 pm
immediately following this session!

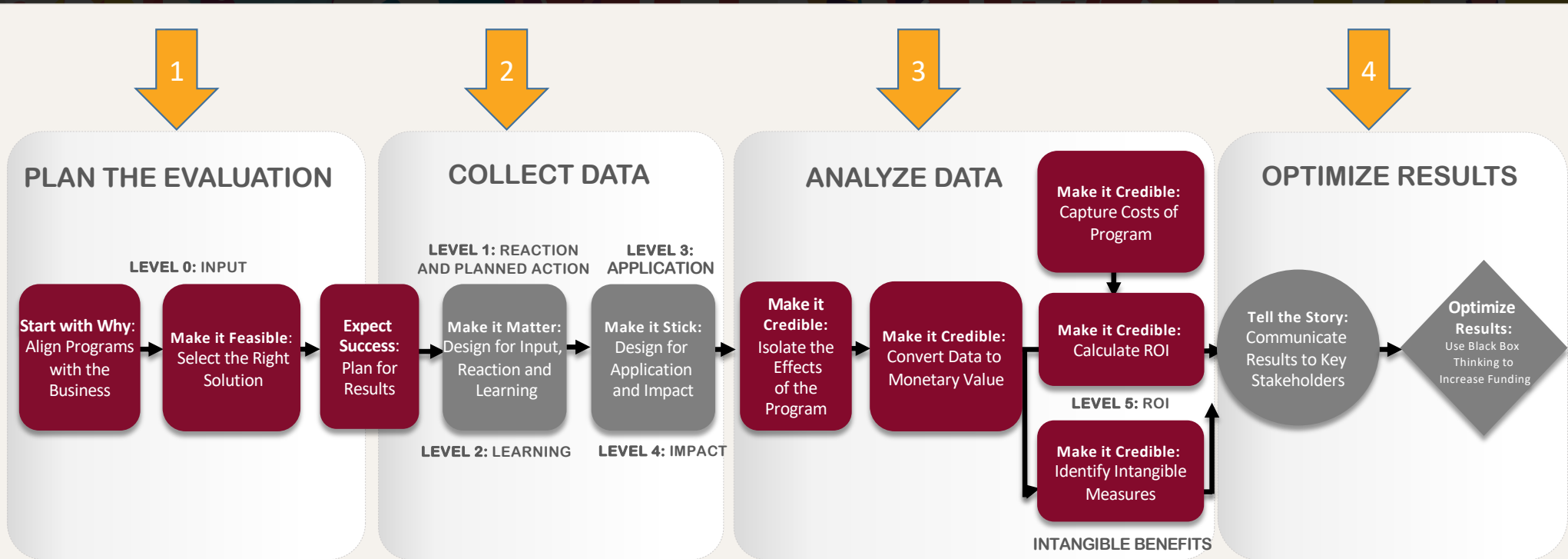


The background is a dense, abstract collage of various geometric shapes, including triangles, circles, and polygons, in a palette of muted colors like olive green, mustard yellow, and dark teal. Overlaid on this are fragments of text in different fonts and sizes, some of which are partially obscured or cut off. The overall effect is a complex, layered visual texture.

THE ROI MODEL

DESIGN THINKING

THE FOUR PHASE ROI METHODOLOGY MODEL





Deborah Masak, CRP

**Vice President of Global Talent &
Inclusion, First Advantage**

Empowering Managers and Building Leaders (SOAR): Global Screening Tech

1

THE PLAN

DESIGN THINKING

START WITH WHY



"I was a SME on my team and was promoted to my current job when our manager left."

People Managers

- Convert SMEs to leaders
- No substantive managerial training
- Inconsistent coaching
- Want opportunities for growth

7%

of FA's employee size

414 people managers

Pain

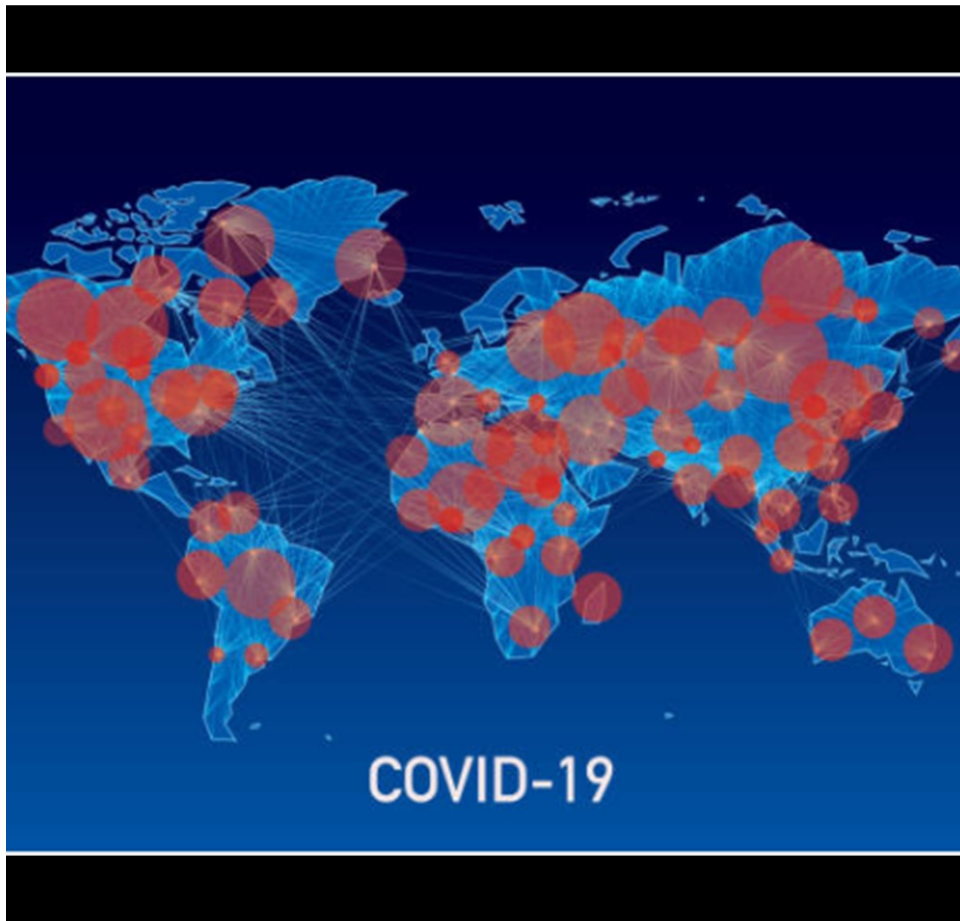
- Lack of respect from former peers
- Struggle managing difficult people & situations
- No basics in HR law
- Unable to effectively manage performance

Business Impact

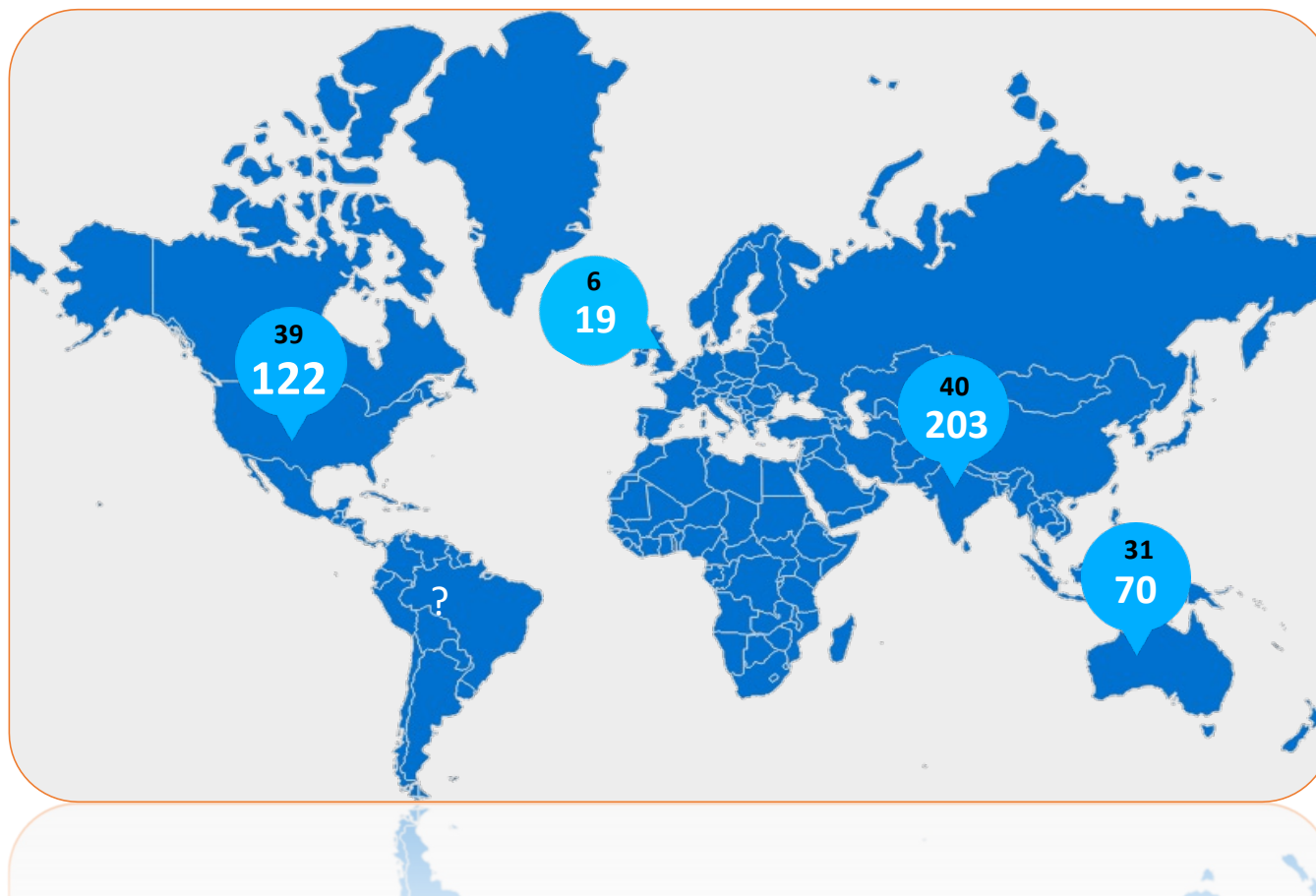
- Their employees log frequent complaints with their HRBP
- Lawsuits ensue many times
- Good employees resign
- Managers are not confident and don't feel empowered
- Productivity levels negatively dip
- Employee engagement scores are much lower than they need to be

**This inspired the need for a program for
empowering managers and building leaders**

MAKE IT FEASIBLE & SELECT THE RIGHT SOLUTION



414 PEOPLE MANAGERS BY REGION
116 (28%) SOAR GRADUATES/CERTIFIED



NORTH AMERICA

122 (39 COMPLETED)

EMEA

19 (6 COMPLETED)

INDIA

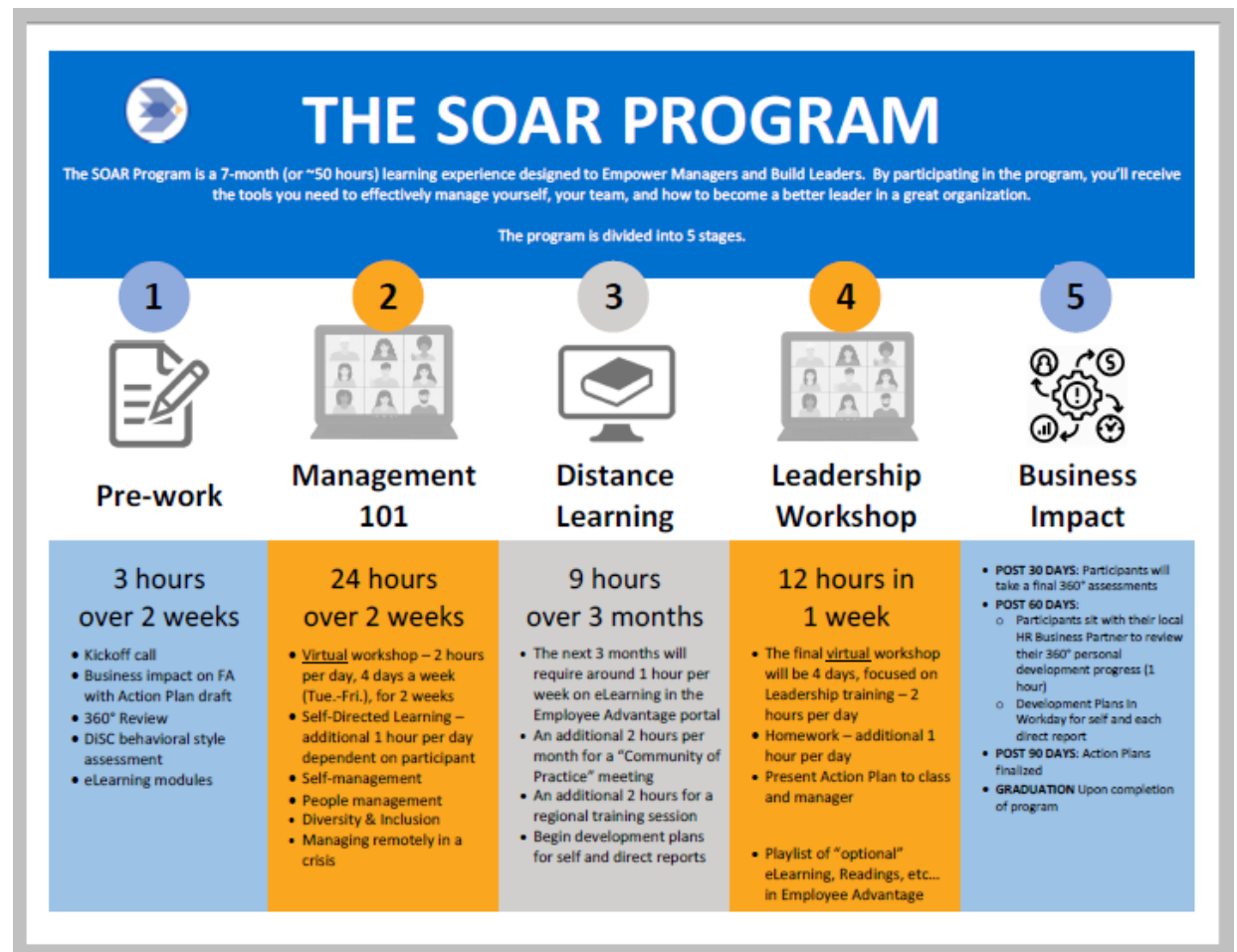
203 (40 COMPLETED)

APAC

70 (31 COMPLETED)

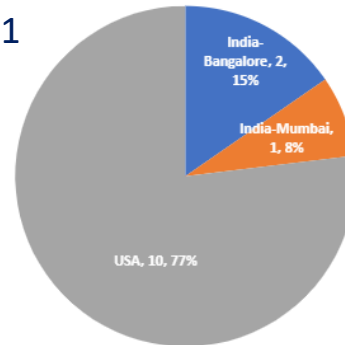
Program is 7
Months or
~50 Hours

2.6% of a
participant's
working
hours/year

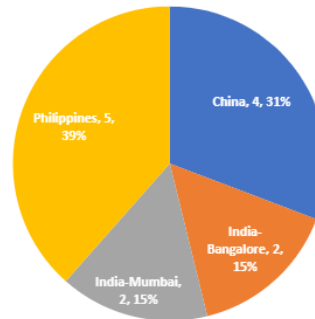


A GLOBAL EXPERIENCE

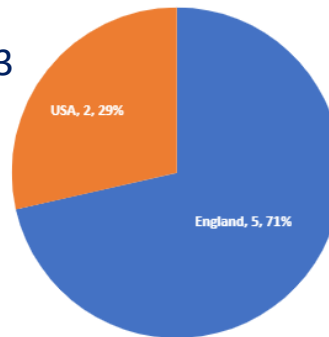
Group 1



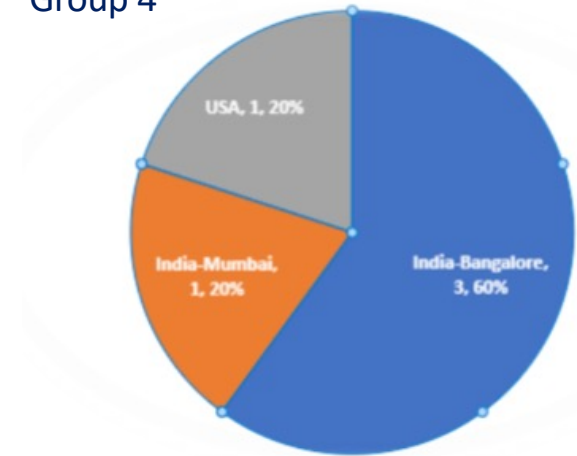
Group 2



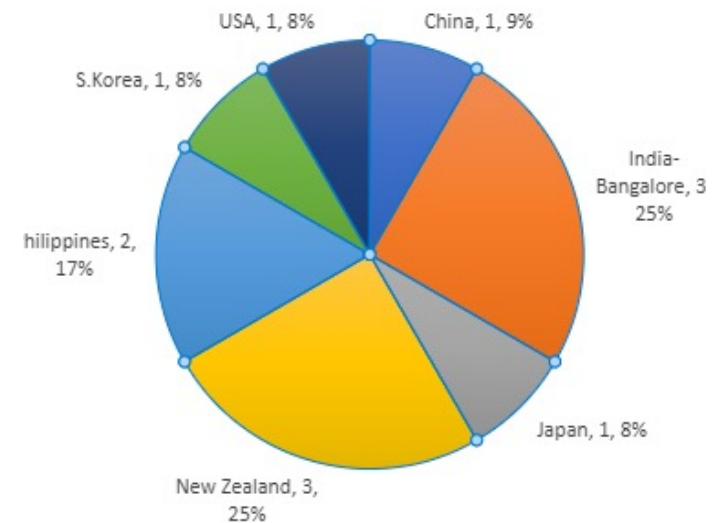
Group 3



Group 4



Group 5



■ 24 SOAR FACILITATORS BY REGION

16 CERTIFIED* FACILITATORS – others in training



NORTH AMERICA

10

* 9 Certified

EMEA

4

* 2 Certified

INDIA

4

* 2 Certified

APAC

6

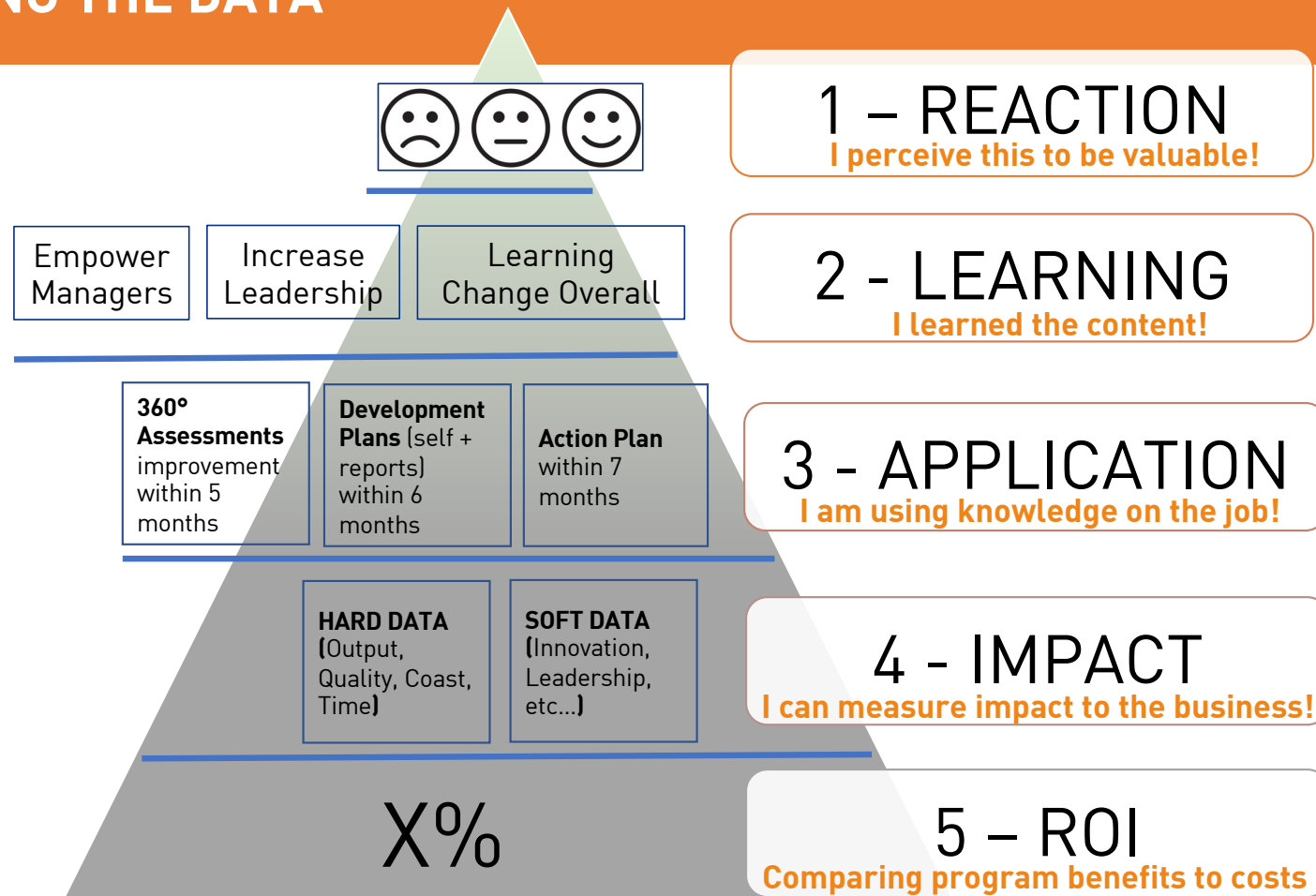
* 3 Certified

2

COLLECT DATA

EXPECT SUCCESS: PLAN FOR RESULTS

COLLECTING THE DATA



MAKE IT
MATTER!
then
MAKE IT
STICK!
then
MAKE IT
CREDIBLE!

Data Collection Plan						
Level	Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
1	SATISFACTION/PLANNED ACTION					
2	LEARNING					
3	APPLICATION/ IMPLEMENTATION					
4	BUSINESS IMPACT					
5	ROI	Comments:				

Level	Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
2 EARLY INDICATOR OF SUCCESS	LEARNING Demonstrate successful use of the following manager skill sets: 1. Know the personality types 2. Identify the global competencies 3. Self-assess emotional intelligence 4. Identify active listening skills used with individuals and groups 5. Reflect productively on 360° feedback 6. Consistently manage performance conversations with employee(s) 7. Set clear SIII goals and expectations 8. Articulate steps to address performance issues 9. Manage crucial conversations around conflicts and differences 10. Identify degrees of delegation 11. Recognize when to coach or mentor appropriately 12. Articulate your role in developing employees 13. Articulate how to identify hiring the right talent 14. Explain how to ask interview questions and listen using the STAR method 15. Know regional laws 16. Reflect and adjust on your Action Plan 17. Recognize why diversity and inclusion are important to team and organizational success 18. Apply strategies for managing teams through a crisis 19. Know how to apply mindfulness for productive team outcomes Demonstrate successful use of the following leadership skill sets: 1. I can name the key results of listening to understand 2. I can describe the actionable outcomes that come from influencing	Test improvement + 4 out of 5 on a 5-point scale	Facilitators' observation Pre-Post Test (Quantum Survey Tool)	Facilitators + Participants	Test before and after EACH workshop	TLC Team & Facilitators

Level	Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
3 Make it Stick	APPLICATION/ IMPLEMENTATION Participants will: 1. Complete the action plan within seven months (3 months after the last workshop) 2. Complete development plans for each employee (2 months after the last workshop) 3. Show improvement in 360° feedback 4. Use the learning portal 5. Participate in three communities of practice 6. Use manager/leadership skills frequently	5 out of 6 on a 6-point scale + Change in behavior + Learning put into effect on the job	Learner Action Plan Final Completed Development Plans in Workday 360° Feedback Questionnaire	Participants	Four instruments completed 2-3 months after final workshop	TLC Team & Facilitators
4 Make it Stick	BUSINESS IMPACT Participants will make improvements in one or two of the following measures as defined by participant: HARD DATA (ideal, because it's measurable) • OUTPUT • QUALITY • COST • TIME SOFT DATA (only if it's important to participant) • LEADERSHIP • WORK CLIMATE/SATISFACTION • INITIATIVE/INNOVATION • CLIENT SERVICE • DEVELOPMENT/ ADVANCEMENT • IMAGE/REPUTATION	Monetary impact of Improvements linked to the program + Improvement in Global Engagement Survey question: I see professional growth and career development opportunities for myself at FA.	Learner Action Plan Results Questionnaire [same for L3]	Participants + Global Employee Engagement Survey	3 months after final workshop	TLC Team & Facilitators

Level	Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
1 EARLY INDICATOR OF SUCCESS	SATISFACTION/PLANNED ACTION Participants will rate the following reactions to pre-work: 1. How would you rate the pre-work preparation? 2. The design of the program was clear 3. My accountability in the program was clearly stated 4. I know how the SOAR program is aligned to the business of First Advantage 5. How would you improve the pre-work phase?	5 out of 6 on a 6-point scale	Survey (Quantum Survey Tool)	Participants		TLC (Talent, Learning & Culture) Team & Facilitators
	Participants will rate the following reactions to Communities of Practice (COP): 1. How would you rate the COPs' organization of topics? 2. How would you rate the pre-work for each COP? 3. How would you improve the COPs? 4. How would you rate the pre-work for the Leadership Workshop?				Directly after Pre-work phase	
	Participants will rate the following reactions to each workshop: 1. The workshop is important to my success 2. The content is relevant to my situation 3. I would recommend this workshop to others 4. The offline training and homework were valuable 5. The technology used was effective 6. The technology used was engaging 7. The facilitator's enthusiasm kept me actively engaged 8. The program is easy to follow 9. I can start implementing the training and lessons learned immediately in my work 10. Which topic did you find MOST beneficial to the training session? 11. Which topic did you find LEAST beneficial to the training session?				Directly after the final COP Directly after each workshop	

Deborah Masak, VP Global Talent & Inclusion – First Advantage, Inc.

3

ANALYZE DATA

MAKE IT CREDIBLE



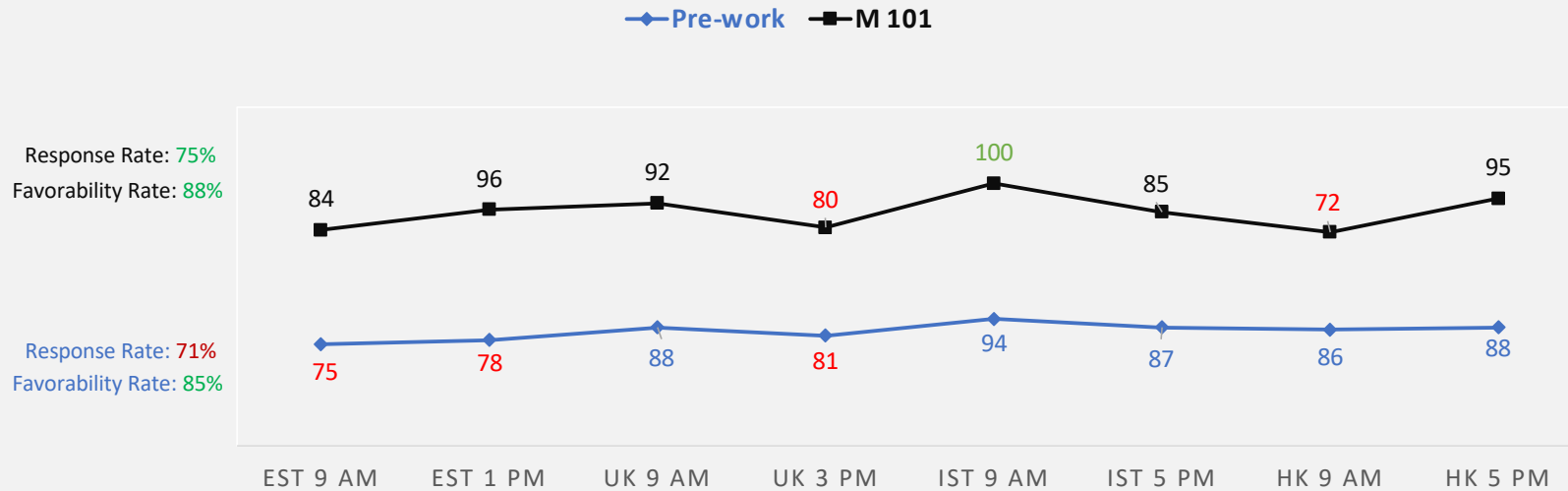
REACTION an Early Indicator of Success (83%)

Key Insights

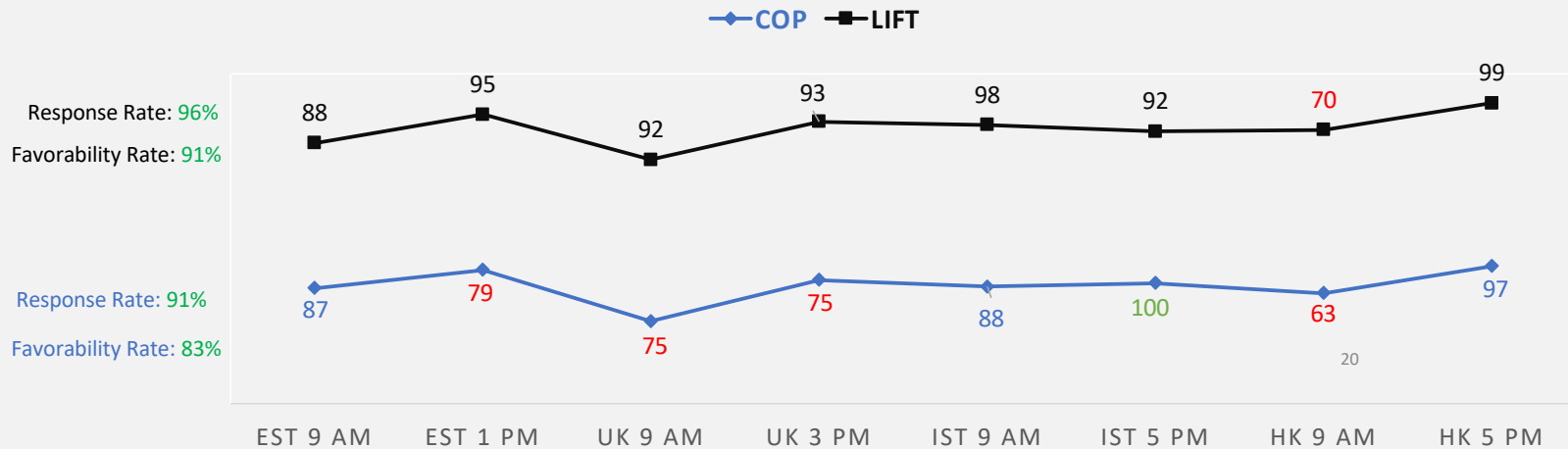
- Overall response rates increased from 71-96%; coordinators focused on follow ups
- **Pre-work** was confusing as was content location and setup
- **M101** Offline homework needed urgent attention and improved to 91%
- **COP** pre-work needed more clarity
- **LIFT** improvements made to earlier stages positively impacted the final stage.



PILOTS LEVEL 1 (REACTION - EARLY INDICATOR OF SUCCESS)



PILOTS LEVEL 1 (REACTION - EARLY INDICATOR OF SUCCESS)

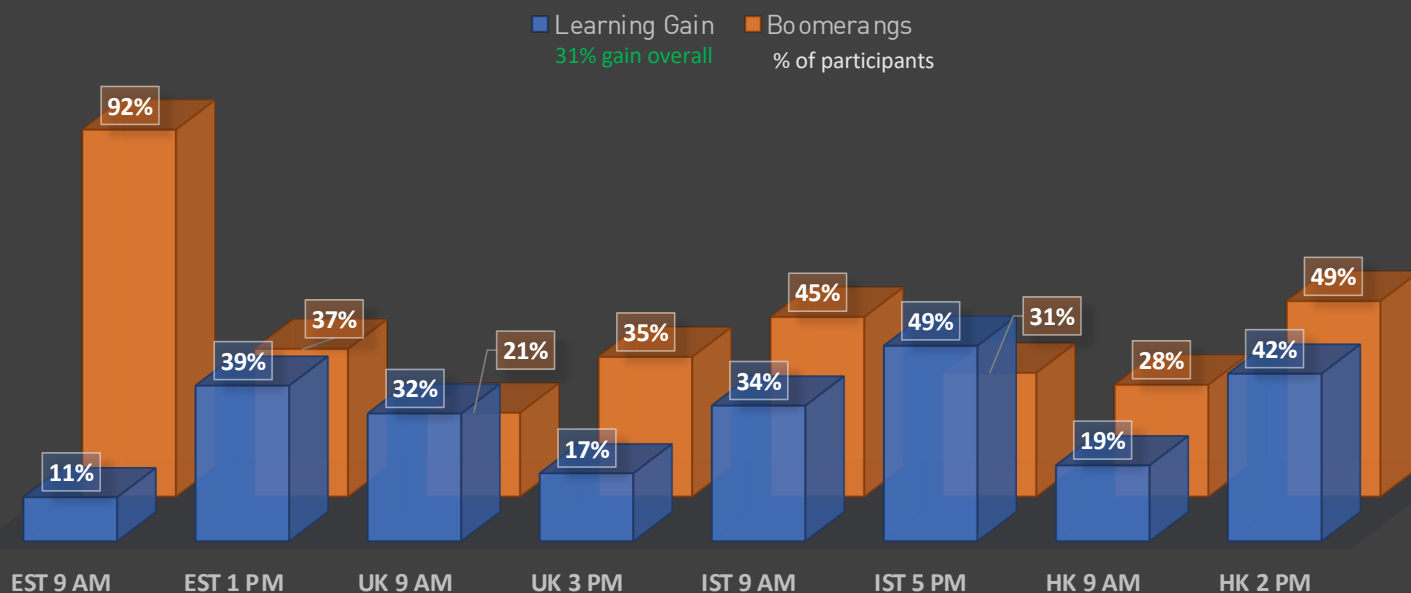


LEARNING an Early Indicator of Success (1%+)

Key Insights

- Learning gain varied
- Varying knowledge of participant
- Exposure to other L&D programs prior to SOAR (one region implemented a mentor program)
- Boomerangs experienced some of the same material, but still had a gain.
- Unable to select “no change” on survey and may have forgotten prior score.
- Overall Gain:
 - M101 31%
 - LIFT 24%

M101 LEVEL 2 (LEARNING - EARLY INDICATOR OF SUCCESS)



APPLICATION

I am using knowledge on the job!



Required for Certification



360° Assessments saw improvement within 5 months. Meeting their HRBP discusses variances in scores and any opportunity for development.

HRPB Meeting: 93% completed this task

IMPROVEMENT:

- Overall Score: 5.4/6.0
- Overall Improvement: 0.11 (i.e., 5.20 to 5.24/6.0)
 - Self: 0.04
 - Manager: 0.12
 - Peers: 0.09
 - Direct Reports: 0.14



Individual Development Plans (self + reports) within 6 months in Workday:

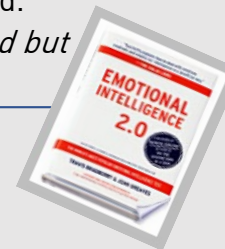
Self IDPs: 87% completed this task

Direct Report IDPs: 16% completed this task

Emotional Quotient (EQ) Assessments

Private EQ test at the beginning of the program and again at the end.

Completion rates not tracked but encouraged.



Action Plan worked on during the program and final plan submitted within 7 months. Key to determine ROI.

Action Plans: 83% completed this task (63% had usable data, 20% were not usable)

17% did not complete an Action Plan



MY ACTION PLAN & PERFORMANCE CONTRACT

PARTICIPANT: _____ MANAGER: _____ FACILITATOR: _____

EVALUATION PERIOD: 2021, START MONTH: _____ END MONTH: _____

IMPROVEMENT MEASURE: _____

CURRENT PERFORMANCE: _____ TARGET PERFORMANCE: _____

SPECIFIC STEPS...I WILL DO THIS...	DATE	DATA ANALYSIS
1.		A. What is the unit of measure? [text.....]
2.		B. What is the value (cost) of one unit? [# or \$ or other value.....]
3.		C. How did you arrive at this value? [text...]
4.		D. How much did the measure change during the evaluation period (monthly value)? [# or \$ or other value.....]
5.		E. What other factors could have contributed to this improvement? [text.....]
6.		F. What percent of this change was actually caused by this program? [x%]
7.		G. What level of confidence do you place on the above information? (100% = certainty and 0% = no confidence) [x%]
Intangible benefits:		Brief comments:

First Advantage

There are many factors that go into employee turnover (or lack thereof), but I can say that at least one of my employees was unhappy with the lack of career growth planning on my team. This action plan effectively corrected that error.

Manager, Software Engineering

IMPACT

I can measure impact to the business!

60%
said they would not have completed an Action Plan prior to SOAR

No	Unit of Measure	Business Unit	MEASURE CHANGE (Annual)	MEASURE CHANGE (2 YEARS)*	CAUSED BY PROGRAM	CAUSED BY PROGRAM (\$ Value)	CONFIDENCE (G)	SOAR ROI Contribution
1	Sales Leads	Revenue	\$324,000	\$648,000	40%	\$259,200	100%	\$259,200
2	Time	Revenue	\$29,500	\$59,000	80%	\$47,200	75%	\$35,400
3	Customer Retention	Revenue	\$3,500,000	\$3,150,000	30%	\$945,000	90%	\$850,500
12	Employee Retention	Product	\$159,356	\$318,712	20%	\$63,742	95%	\$60,555
13	Time	Product	\$15,840	\$31,680	50%	\$15,840	100%	\$15,840
14	Time	Operations	\$3,600	\$7,200	5%	\$360	95%	\$342
15	Time	Operations	\$30,364	\$60,728	10%	\$6,073	90%	\$5,466
27	Time	IT	\$300,000	\$600,000	100%	\$600,000	100%	\$600,000
28	Subscription Fee	IT	\$375,000	\$750,000	100%	\$750,000	99%	\$742,500
35	Time	HR	\$2,808	\$5,616	95%	\$5,335	95%	\$5,068
36	Time	HR	\$16,132	\$32,264	0%	\$0	0%	\$0
37	Time	Finance	\$1,542,857	\$3,085,714	50%	\$1,542,857	100%	\$1,542,857
38	Time	Finance	\$7,500	\$15,000	100%	\$15,000	99%	\$14,850
39	Cost to Rehire	Customer Care	\$468,000	\$936,000	50%	\$468,000	75%	\$351,000
40	Time	Customer Care	\$52,650	\$105,300	90%	\$94,770	90%	\$85,293
Total Impact Attributed to the SOAR Program								\$7,862,814

*Projection of impact spanned two years due to the length and complexity of the program.

Sample Action Plan Results

Improvement Measures

- 75% used “time”
- 11% used “cost to re-hire” an employee
- One used “consumption cost” of paper and saved 34 trees

\$7.9M

Analysis Costs		Total
Salaries & Employee Benefits (No. of People x Avg. Salary x Employee Benefits Factor x No. of Hours on Project)		\$1,880.00
Registration Fees		\$100.00
Total Analysis Cost		\$1,980.00
Development Costs		Total
Salaries & Employee Benefits (No. of People x Avg. Salary x Employee Benefits Factor x No. of Hours on Project)		\$221,000.00
Program Materials and Supplies Total		\$12,217.00
eLearning	\$640.00	
Books	\$294.00	
Manuals and Materials	\$2,883.00	
Behavioral Assessments/Certifications	\$8,400.00	
Total Development Costs		\$233,217.00
Delivery Costs *		Total
Participant Costs Total		\$106,262.00
Salaries & Employee Benefits (No. of People x Avg. Salary x Employee Benefits Factor x No. of Hours on Project)	\$106,262.00	
Facilitator Costs Total		\$79,742.00
Salaries & Benefits (Facilitators)	\$47,499.00	
Salaries & Benefits (HRBP)	\$28,243.00	
Outside Services	\$4,000.00	
Coordinator Expense		\$1,152.00
Third Party Courses (\$330 x 70 participants)		\$23,100.00
Total Delivery Costs		\$210,256.00
Evaluation Costs		Total
Salaries & Employee Benefits (No. of People x Avg. Salary x Employee Benefits Factor x No. of Hours on Project)		\$11,600.00
Total Evaluation Costs		\$11,600.00
TOTAL PROGRAM COSTS		\$457,053.00

Cost of SOAR

\$457K

*Minimal cost for a virtual program (e.g., in-person costs such as travel, room accommodations, food and beverage).



ROI – calculate the return on investment



BCR (*Benefit Cost Ratio*)

$$\frac{\text{BENEFITS } \$7,862,814}{\text{COST } \$457,053} = 17.20$$

17:1

For every dollar invested in SOAR, the dollar is returned plus another \$17 in monetary benefits

ROI (*Return on Investment*)

$$\frac{\text{BENEFITS-COST } \$7,862,814 - \$457,053}{\text{COST } \$457,053} \times 100$$

1,620%

IMPACT – Intangibles are worthy data points!



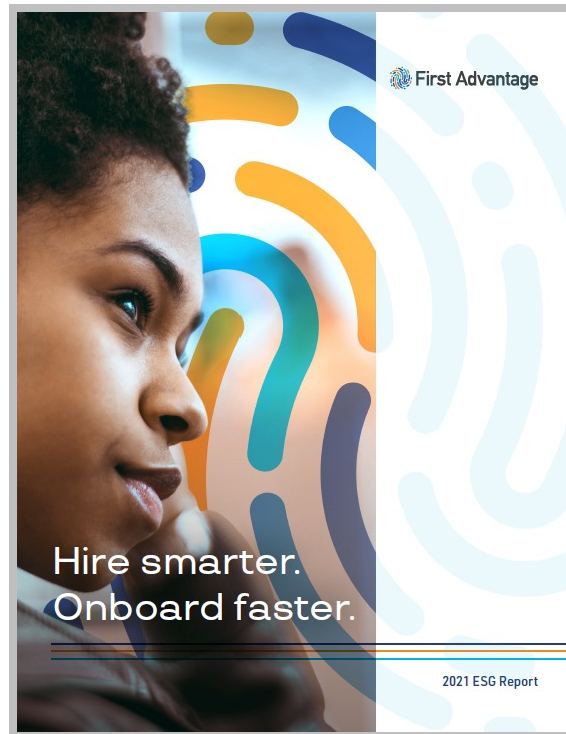
From the voices across seven business units

Product | Revenue | IT
| Customer Care |
Marketing | HR | Finance

Intangible Benefits

- Stress management and reduction
- Team engagement
- Employees feeling proud to work here
- Improved communication
- Time management and efficiency
- Improved team morale
- Customer satisfaction
- Improved job satisfaction

SOAR in Inaugural ESG Report!



Favorability Rating of the
Overall SOAR Program

From Very Good to
Excellent

87%

4

OPTIMIZE RESULTS

TELL the STORY

Lessons Learned

- Checklist needed to manage participants' progress due to size and complexity of program
- Develop more training around completing Action Plans
- Continue to use Agile development when changes are obvious to be made – benefits for each subsequent group
- Gather managers' feedback on what blocks their direct reports from developing themselves
- Build a better sense of community in a virtual environment to build rapport

THE END

The SOAR program has been indispensable in enabling me to better manage my team and my own time and workload, leading to greater employee satisfaction as well as measurable benefits in terms of cost saving.

Team Lead

Thank you again for affording our employees this outstanding opportunity for self-development. My lines of business and our organization as a whole is stronger as a result.

Vice President



Dr. Bill Brantley, CPTD

**President and Chief Learning
Officer, BAS2A**

Supervisor Certificate Program Redesign: U.S. Patent and Trademark Office

Supervisor Certificate Program Redesign: U.S. Patent and Trademark Office

Context – 8 sessions / 8 hours each, 85% PowerPoint lectures

Challenge – Management questioned the value of the training

Actions – Redesign guided by ROI Methodology



Supervisor Certificate Program Redesign: U.S. Patent and Trademark Office

Results and Impact

Realized value of increasing employee engagement by 3%: \$382,568.40

$$\text{BCR} = \frac{\$463,638.73}{\$382,568.40} = 1.21:1$$

$$\text{ROI} = \frac{\$463,638.73 - \$382,568.40}{\$382,568.40} \times 100 = 21.19\%$$



Supervisor Certificate Program Redesign: U.S. Patent and Trademark Office

Results and Impact (Intangibles)

1. Improved employee engagement
2. Increased morale
3. Increased trust in the workplace
4. Increased employee productivity – *specifically, an increase in the number and quality of examined patent and trademark applications*



Supervisor Certificate Program Redesign: U.S. Patent and Trademark Office

Lessons Learned

1. Making the business case that appeals to senior management
2. Focus on Level 3 (Application) and Level 4 (Impact)
3. Don't lose sight of your stakeholders' perspectives
4. Process improvement is the key



Sulaiman Hamed Al Ghafri

Learning & Development Expert

Oil & Gas Sector

Leadership Coaching Program: Oil and Gas Company

Leadership Coaching Program: Oil and Gas Company

Business Alignment

The oil and gas industry is price sensitive. Operating costs must be managed carefully to remain profitable. Top management would like to operate the business with minimum cost to achieve profitable growth and efficiency.

Business Measures/Challenges

- ☐ Reduce delays with projects and tasks.
- ☐ Save time and costs.
- ☐ Fix field troubleshooting and its effect on production.
- ☐ Utilize the intangible results: motivation, engagement, and creativity for better performance.

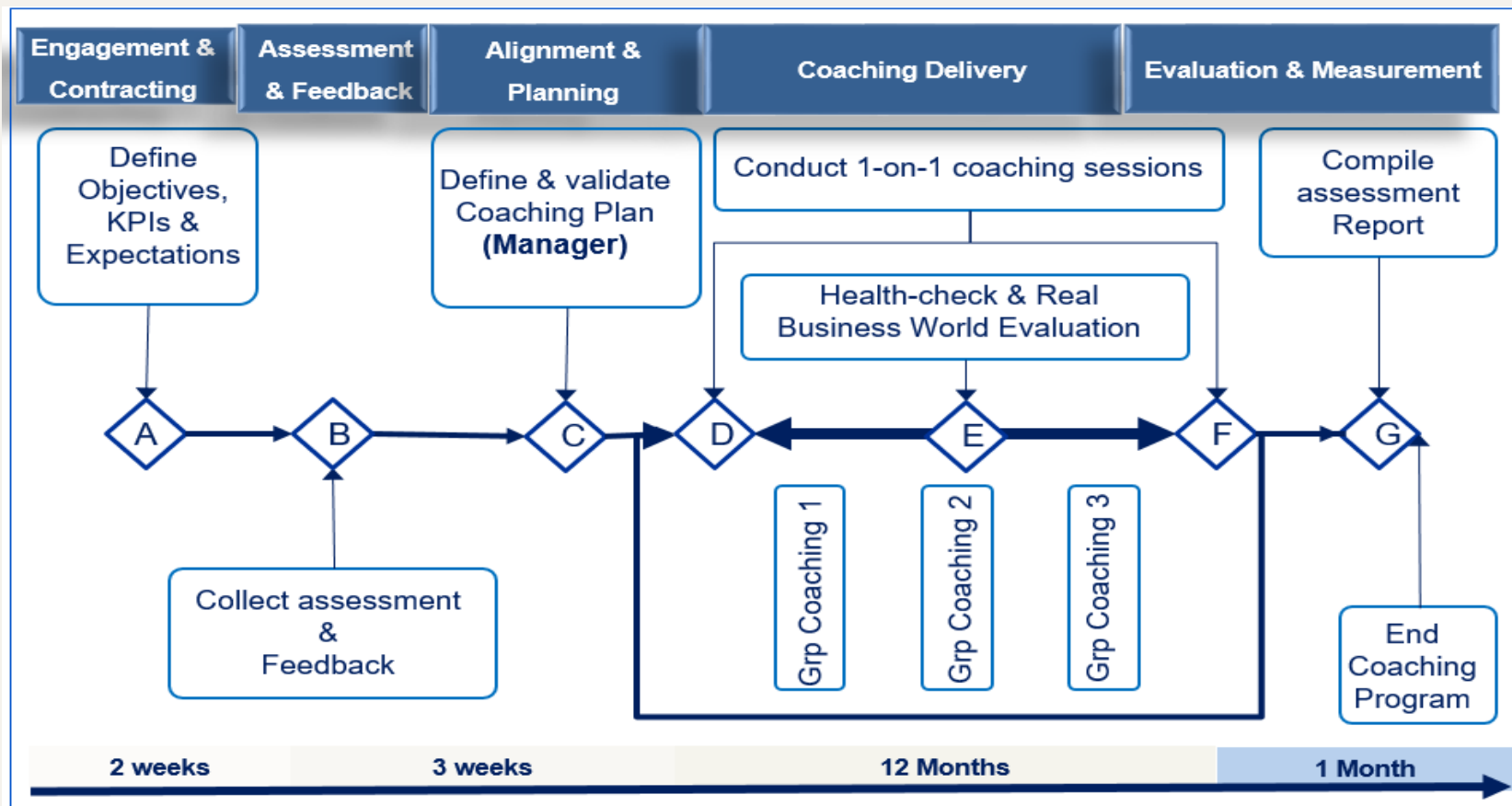
How to solve it?

Solution

Conduct Leadership Coaching Program:

- ☐ Target: Supervisors and Team Leaders (81)
- ☐ Learning Methods:
 1. Leadership Development Workshops
 2. One to One Coaching

Leadership Development Program Approach



Leadership Coaching Program: Oil and Gas Company

Results (Level 1 To 3)

Level 1: Satisfaction
/Reaction

86%

Knowledge Gained

23%

Pre = 55%
Post = 78%

Application

26%

Pre = 54%
Post = 80%

Leadership Coaching Program: Oil and Gas Company

Results (Level 4: Impact)

Result Area	Pre-Coaching	Post-coaching	Difference	What is the percentage that the program influenced the result?	What percentage you are confident of your answer?	Equivalent Cost Value
Machine Tripped						
Process Improvements: Identify the issue, Daily process meeting, Weekly progress meeting, Award the control room. Competencies used (Engagement, Delegation, Trust, Motivation, Ownership)	2448 Hrs	276 Hrs	2172 Hrs	50%	90%	Annual cost saving = $2,592,925 * 50% * 90\% = \$1,166,816$
Job Backlog						
Process Improvements: - Check the job backlog daily and giving constructive and direct feedback to team - Monthly report send to senior management - Coachees enabled team members to self-discover solutions (Enabling creativity) - Coachees promoted the sense of ownership and trust in team members to be self-responsible	2537 Hrs	897 Hrs	1640 Hrs	50%	90%	1640 Hrs per Year = \$21,299 $21,299 * 50% * 95\% = 9,585 \text{ USD}$
Total						1,176,401 USD

Leadership Coaching Program: Oil and Gas Company

Results and Impact

Realized value of
increasing employee
engagement by 3%:
\$382,568.40

$$\text{BCR} = \frac{\$1,176,401}{\$439,344} = \mathbf{2.67:1}$$

➤ For every **\$1 invested**, there is **\$2.67 in benefit**.

$$\text{ROI} = \frac{\$1,176,401 - \$439,344}{\$439,344} \times 100 = \mathbf{167\%}$$

➤ For every \$1 invested, \$167 returned after the investment recovered.

$$\text{Payback Period} = \frac{\$439,344}{\$1,176,401} = .373 \times 12 = \mathbf{4.48}$$

➤ The investment will be **paid back** in just **4 months** and few days.



Leadership Coaching Program: Oil and Gas Company

Intangible Benefits

Employees have more trust because of leaders' new behavior, which leads to better performance. More intangible benefits include:

- Creativity
- Motivation
- Teamwork
- Customer service
- Commitment
- Job satisfaction
- Engagement
- Delegation



Patti P. Phillips, Ph.D., CPTD
CEO, ROI Institute, Inc.

Empathetic and Inclusive Leadership Program:

Global Technology Corporation

Solution: Empathetic and Inclusive Leadership Program



Communicate often and openly.



Clearly communicates expectations.



Open to new ideas and approaches.



Listens intently to team members.



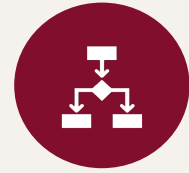
Involves all team members in key issues.



Has the flexibility to change opinions.



Create a feeling of succeeding and failing together.



Provides safety for trial and error.



Alignment

Start with Why: Align Programs with the Business

- Data, discussion, benchmarking led to business measures
- Voluntary turnover, transfers, absenteeism, job engagement, other measures

Make it Feasible: Select the Right Solution

- The leaders (participants) made the connection.

Expect Success: Plan for Results

- Definition of success: Impact (business measures)
- Objectives developed for reaction, learning, application, and impact
- Objectives provided to all stakeholders with the request: Design to application and impact



Make it Matter: Reaction and Learning Data

Level 1: Reaction

The program is important to our mission.	4.2
The program is important to me.	4.6
The program is something I will use.	4.9
The program is something I will recommend to others.	4.0

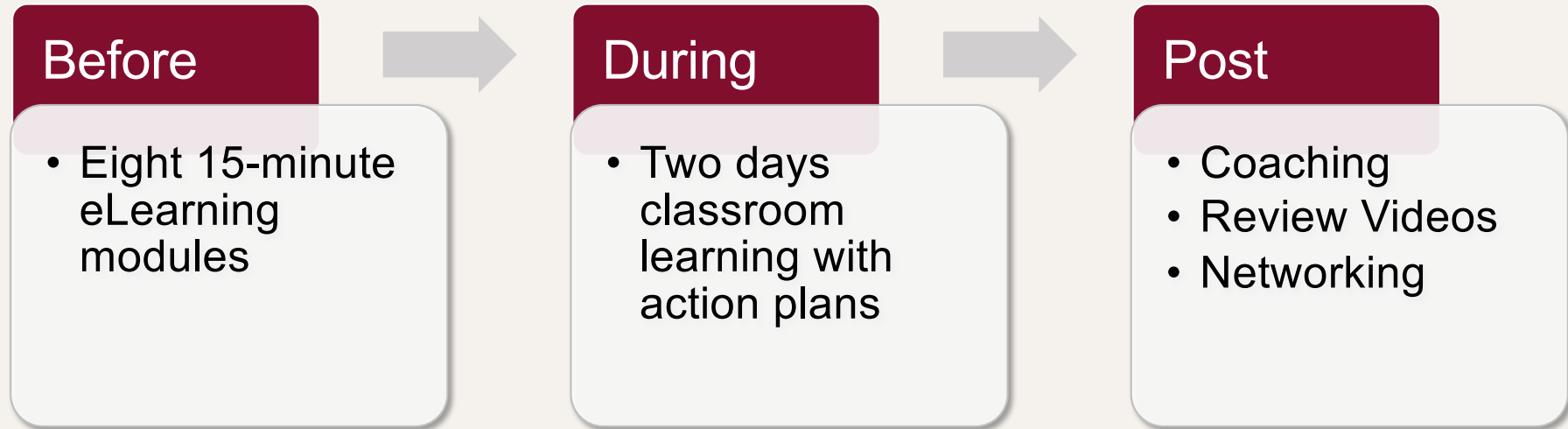
Rating: 1 = Not at All 2 = Some 3 = Average Amount 4 = Significant Amount 5 = Very Significant Amount
Target 4.0 / 5.0

Level 2: Learning

Communicate often and openly.	4.2
Clearly communicate expectations.	4.1
Be open to new ideas and approaches.	3.9
Listen intently to team members.	4.0
Involve all team members in key issues.	4.1
Have the flexibility to change opinions.	3.9
Create a feeling of succeeding and failing together.	3.8
Provide safety for trial and error.	3.9

Rating: 1 = Not at All 2 = Some 3 = Average Amount 4 = Significant Amount 5 = Very Significant Amount
Target 4.0 / 5.0

Program Design*



*Evaluate three groups (16 people per group for a total of 48 people)



Make it Stick: Application and Impact Data

	Extent of Use	Success with Use
Communicate often and openly.	4.3	4.4
Clearly communicate expectations.	4.2	4.3
Be open to new ideas and approaches.	4.3	4.3
Listen intently to team members.	3.9	4.2
Involve all team members in key issues.	4.1	4.0
Have the flexibility to change opinions.	3.2	3.9
Create a feeling of succeeding and failing together.	3.4	4.1
Provide safety for trial and error.	3.5	3.8

Rating: 1 = Not at All 2 = Some 3 = Average 4 = Significant 5 = Very Significant
Target 4.0 / 5.0



Barriers and Enablers

Barriers	Percent Responding
Not enough time to use the concepts	16%
Communication breakdowns	12%
Too difficult to use the concepts	11%
Lack of confidence to apply learning	9%
Technology issues	7%

Enablers	Percent Responding
Support from leadership	75%
Coaching	71%
Support from colleagues and peers	62%
Networking	51%
Opportunity to use skills	50%
Sufficient knowledge, understanding, and awareness	43%



Make it Credible: Isolate the Effects of the Program

- Explored: Experimental versus control group
- Tried: Trend line analysis
- ***Used: Estimates from participants adjusted for error***

Make it Credible: Convert Data to Monetary Value

- Voluntary Turnover – HR provided (150% of annual pay)
- Transfers – HR provided (\$15,500)
- Absenteeism – Payroll provided (\$428 per absence)
- Others – Varies
- Total Monetary Value – One year of benefits

Sample Action Plan

Name:	Andrew Roganski	Facilitator Signature:	Follow-Up Date	April 1
Objective:	Reduce Absenteeism Rate	Evaluation Period:	January–April	
Improvement Measure:	<u>Unplanned Absenteeism Rate</u>	Current Performance	<u>7.5% per day per month (avg.)</u>	Target Performance <u>5.2% per day per month (avg.)</u>

Action Steps	Analysis
1. <u>Review absenteeism records for each employee—with a focus on trends and patterns.</u>	A. What is the unit of measure? <u>One Absence</u>
2. <u>Discuss reasons for absenteeism with them using problem-solving skills.</u>	B. What is the value (cost) of one unit? <u>\$428</u>
3. <u>Consult with HR team on absenteeism issues and trends.</u>	C. How did you arrive at this value? <u>Contacted HR</u>
4. <u>Discuss how leadership and work culture can influence unplanned absences.</u>	D. How much did the measured change during the evaluation period? (monthly value) <u>2.1%</u>
5. <u>Counsel at-risk employees to explore opportunities for improvement.</u>	E. What other factors have contributed to changes in absenteeism? Show positive or negative. <u>Special program on "Being Accountable" from the Culture Change Team (Positive)</u>
6. <u>Conduct a positive discussion with every employee returning to work after an unplanned absence.</u>	F. What percent of this change was caused by this program? <u>70%</u>
7. <u>Provide recognition to employees who have perfect attendance.</u>	G. What level of confidence do you place on the above information? (100% = Certainty and 0% = No Confidence) <u>80%</u>
8. <u>Follow-up with each at-risk employee, discuss improvement or lack of progress, and plan other action.</u>	H. How many team members do you lead? <u>21</u>
9. <u>Monitor improvement routinely, and provide recognition when appropriate.</u>	
Intangible Benefits: <u>Improved morale</u>	

Comments: This keeps me focused.

Monetary Calculations From Action Plans

Measure	% Participants Claiming	# Prevented Annually	Unit Cost	Annual Value	Contribution	Confidence	Total
Voluntary Turnovers	42% (20)	14	\$222,000	\$3,108,000	31%	72%	\$693,706
Transfers	54% (26)	9	\$15,500	\$139,500	43%	76%	\$45,589
Absenteeism	38% (18)	25	\$428	\$10,700	37%	73%	\$2,890
Others* *Questionnaire	10% (5)	Varies	Varies	\$39,600	63%	81%	\$20,208
						Total \$762,393	



Make it Credible: Identify Intangible Benefits

To what extent did this program influence this measure:

	Extent of Use
Productivity	4.8
Innovation	4.7
Compassion	4.6
Job Satisfaction	4.6
Engagement	4.5
Quality of Work	4.5
Trust	4.4
Collaboration	4.2

Rating: 1 = No Influence 2 = Some Influence 3 = Average Influence 4 = Significant Influence 5 = Very Significant Influence

Target: 20% of respondents had to rate an item 3.0 or above to be reported as a benefit.

Make it Credible: Capture Costs of Program

Needs assessment (prorated)	$\$20,000 / 2,400 \times 48$	\$400
Research/Development costs (prorated)	$\$50,000 / 2,400 \times 48$	\$1,000
Production costs (prorated)	$\$25,000 / 2,400 \times 48$	\$500
Salaries/benefits facilitation	$\$10,000 \times 3$	\$30,000
Salaries/benefits coordination	$\$4,800 \times 3$	\$14,400
Salaries/benefits participation	$\$2,770 \times 48$	\$132,960
Coaching	$\$2,100 \times 48$	\$100,800
Travel and lodging	$\$1,976 \times 48$	\$94,848
Facilities	$\$300 \times 6$	\$1,800
Evaluation (internal and external)		\$11,000
Prorated over life of program = 2,400 managers Three groups of 16 managers = 48 managers		Total \$387,708

Make it Credible: Calculate ROI

Total Monetary Benefits = \$762,393

Total Costs = \$387,708

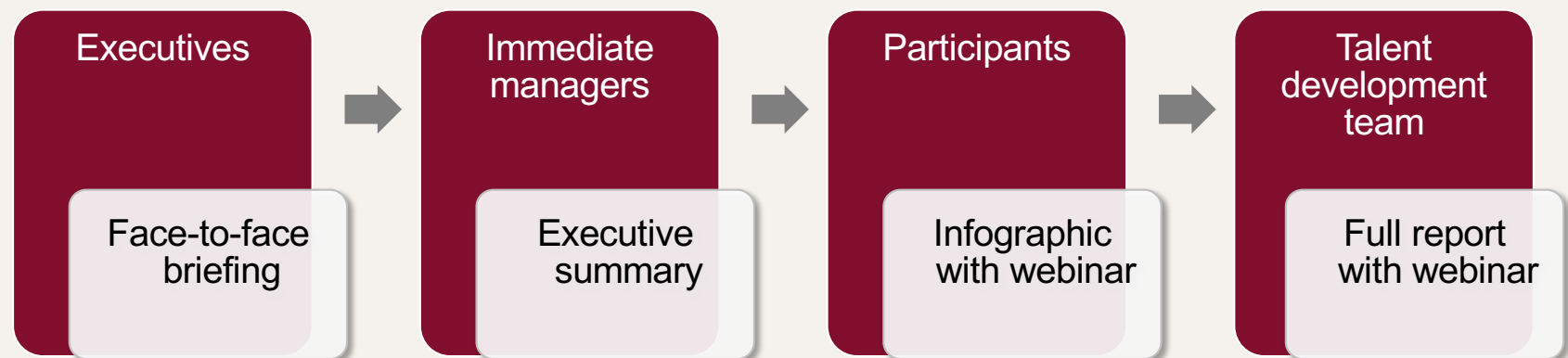
$$\text{BCR} = \frac{\$762,393}{\$387,708} = \mathbf{1.97:1}$$

$$\text{ROI} = \frac{\$762,393 - \$387,708}{\$387,708} \times 100 = \mathbf{97\%}$$



Tell the Story: Communicate Results to Key Stakeholders

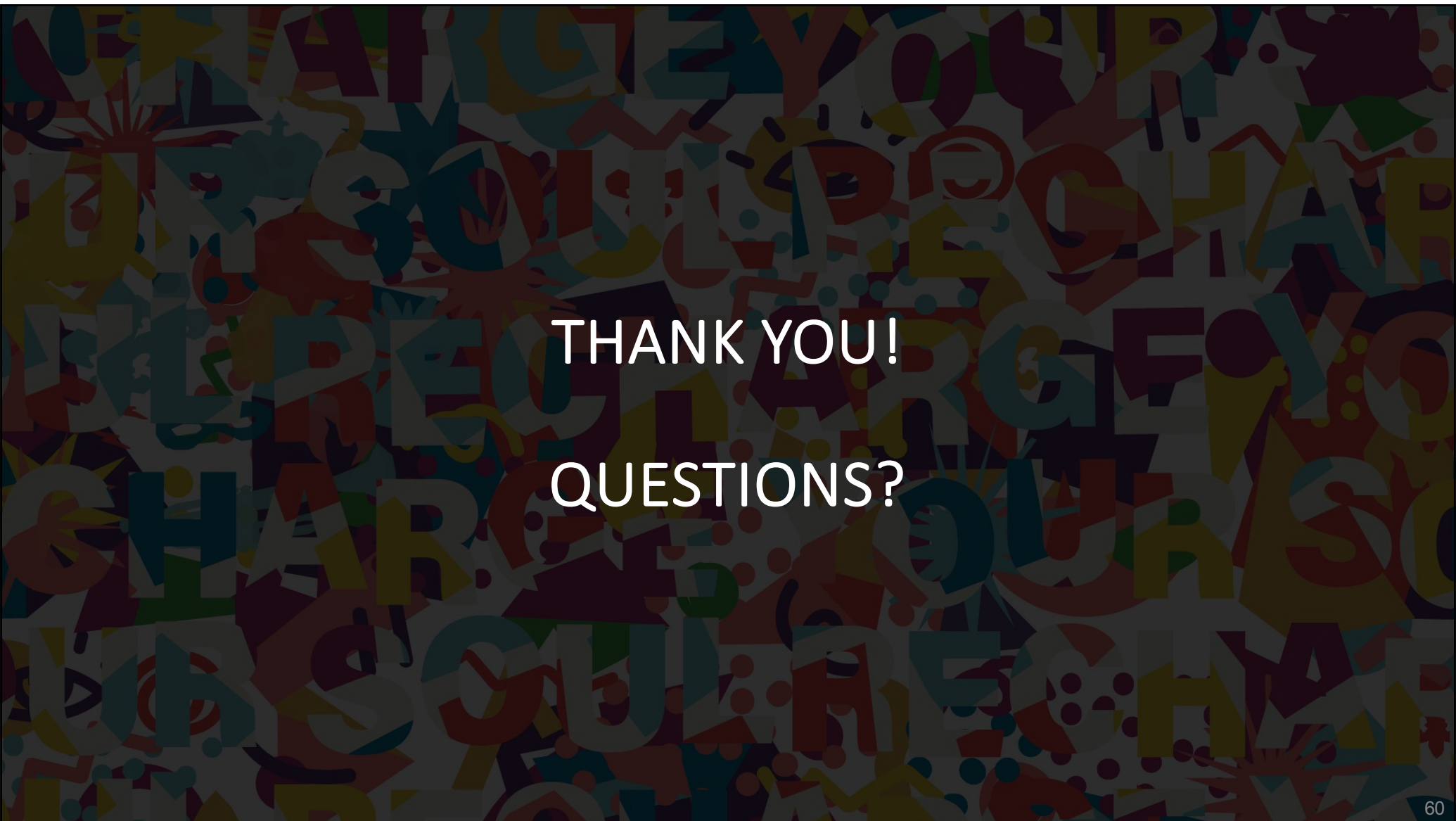
With numbers and narrative, results were communicated to:





Optimize Results: Use Black Box Thinking to Increase Funding

- Although the objectives were met, there is always room for improvement.
- The barriers, enablers, and suggestions are sources for making it better.
- There may be an opportunity to connect this problem to tangible measures of productivity, quality, innovation, and recruiting effectiveness.
- This program should not be in jeopardy of funding and enjoy increased support and commitment based on this study.
- The reputation of talent development was enhanced because of this study.

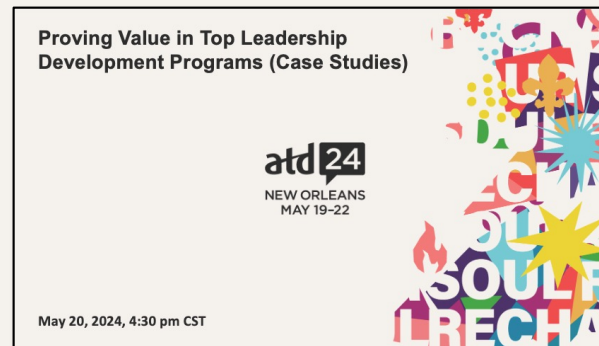
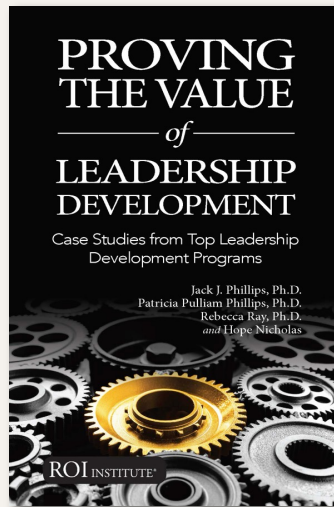


THANK YOU!

QUESTIONS?

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Scan the QR code to access the resources from today's session including a copy of the featured case studies.



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