



Show the Value of What You Do: Measuring and Achieving Success in Any Endeavor

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- ✓ Trained **600 managers**
- ✓ **100%** of participants **downloaded the badge**
- ✓ Received **4.5 out of 5** on **facilitator engagement**
- ✓ **85%** of participants indicated a **commitment to apply**
- ✓ Achieved a **Net Promoter Score (NPS)** of **90**
- ✓ **98%** indicated they now **know their personality type**

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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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ROI Defined

$$\text{BCR} = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

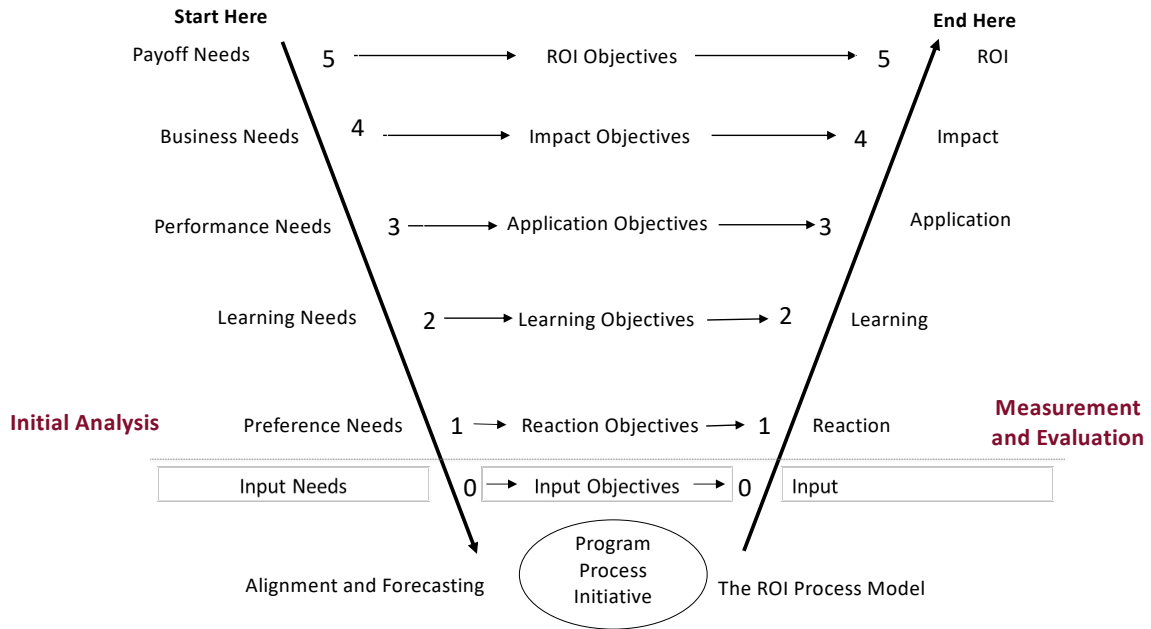
$$\text{ROI} = \frac{\text{Program Benefits} - \text{Program Costs}}{\text{Program Costs}} \times 100$$



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Alignment Model



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SECOR Bank

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SECOR Bank: The Why

Payoff Need	• Mergers and acquisitions taking out the competition. • Financial institution facing operational issues. • Customer service scores at an all time low. • Overall turnover 57% compared to 26% for the industry. • Cost of turnover ranges from 110% to 125% of salary.
Business Need	• Voluntary turnover in branches is the biggest problem. • Turnover is 71% or 336 employees voluntarily leaving each year. • This contributes to the customer service problem. • Cost of turnover per job is \$16,650 per person.

What would be your approach to determine the cause of turnover?

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Matching Evaluation Levels with Objectives

After completing this program, participants should:

1.	Decrease employee complaints by 20% in one year.	
2.	Use problem-solving skills to uncover conflict causes.	
3.	Be able to demonstrate the five steps to calm an upset colleague.	
4.	Rate the facilitator 4 out of 5 on presentation skills.	
5.	Decrease the amount of turnover by 30% in six months.	
6.	Achieve a 20% ROI one year after implementation of conflict resolution program.	
7.	Perceive the content to be relevant their situation (4.5 out of 5).	
8.	Decrease transfers by 25% in six months.	
9.	Conduct a proper investigation using the seven-step process in 95% of complaint situations.	
10.	Score an average of 20 or better on a conflict resolution quiz.	

1 = Reaction

2 = Learning

3 = Application

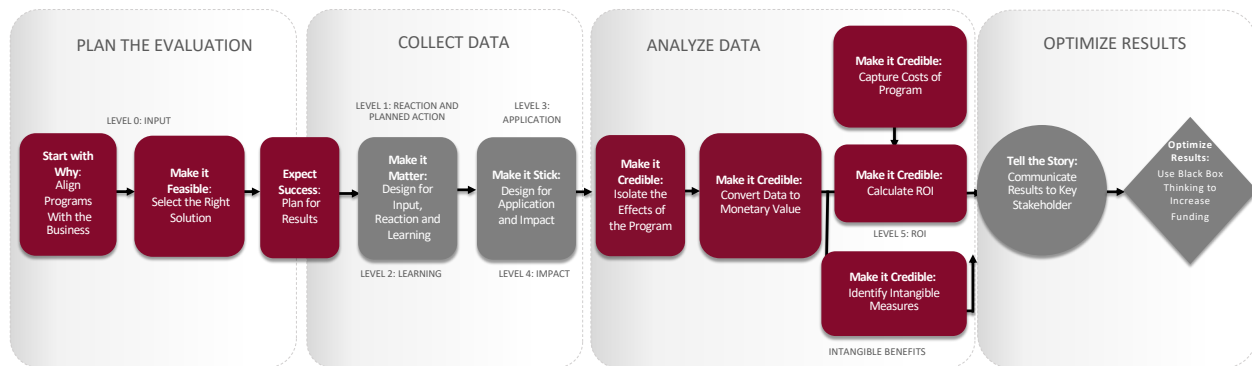
4 = Impact

5 = ROI

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The ROI Methodology Process Model



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Case Application and Practice: Healthcare, Inc.

Healthcare organization experiencing high levels of complaints and turnover.

- **Cost of one complaint: \$24,343**
- **Cost of one turnover statistic: \$20,887**

The organization implemented a program that involved senior executives at an offsite meeting for two days. They then shared what they learned with their immediate reports during a routine staff meeting, who then did the same with their team.

This was an inexpensive solution for a very expensive problem.

Data Collection

- (L1) Questionnaire – end of program
- (L2) Knowledge assessment; skill practice – during program
- (L3) Self-Assessment questionnaire – 6 months post-program
- (L3) Employee survey (25% sample) - 6 months post-program
- (L4) Complaint and Turnover records – 12 months post-program

Isolation Techniques

- Complaints – Trendline analysis
- Turnover – Forecasting

Program Costs

- Fully-loaded including needs assessment, design, development, implementation, and evaluation
- Total cost: \$277,987

Benefits (after isolation)

- Complaints prevented over one year: 14.8
- Turnover prevented over one year: 136

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Benefits

Complaints: 14.8
Turnover: 136

$$\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100 = ???\%$$

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



Tell your story. Optimize results.

Source: Kaycee Buckley, Director of Global Commercial Talent for large healthcare organization. Illinois. Featured in Phillips, P. P. and Phillips, J. J. (2023) Show the Value of What You Do. Oakland, CA: Berrett-Koehler Publishing, p. 128-129. 12

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To demonstrate the impact and ROI:

- Get clear on the why.
- Identify the most feasible solution.
- Set expectations with objectives, including business impact objectives.
- Collect data throughout implementation.
- Analyze data appropriately.
- Tell the story.
- Learn from what worked and what didn't and improve your process.

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When it comes to showing value:

Hope is not a strategy.

Luck is not a factor.

Doing nothing is not an option.

Change is inevitable. Progress is optional.

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