

Presents: Measuring Business Impact & ROI

Date: July 25-26 Two-day workshop. **Early Bird 5% discount**, before June 20.

Price: CNY 8300 • Register this workshop and TNA = 5% discount on each.

Venue: Le Royal Meridien Shanghai, 789 Nanjing Road East, Shanghai 200001

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Takeaway! Each participant receives: Detail participant workbook with exercises, tools and practical guides • Color foldout ROI job aid • Graphic visual alignment learning map • Handouts and templates • Questionnaires and focus group guides

Apply the latest practical, systematic & credible methodology to show the value of learning solutions, and design training programs to achieve sustained results and return on investment

Training today must be aligned with the business and results must be visible.

The business and economic landscape has changed permanently. Executives will no longer support funding for training organizations that do not make a visible contribution to the business. They demand a training partner that knows how to address performance issues with solutions that make a measured difference.

Executives demand a versatile and resourceful training organization that will shift priorities on short notice – a partner that can align solutions to the business and sustain results. They demand focused solutions that aim for the end-in-mind and actually achieve it.

This workshop provides proven real-world tools, worksheets, and processes to help you link your training to the business and measure results, including ROI. You will take a dramatic leap forward in demonstrating the contribution of your training programs, and achieve a new level of accountability. Walk away from this workshop with tools that get results and gain management cooperation, support and respect.

Capitalize on expert experience to learn international best practices such as:

- ❖ **LEARNING** a proven, systematic and credible methodology to determine the value of training solutions.
- ❖ **APPLYING** standards to analyze data, determine causal influences and sustained impact, and link training to business outcomes.
- ❖ **DETERMINING** the timing of data collection and selecting the appropriate data collection instruments.
- ❖ **ANALYZING** key decision points to make a go / no go decision to assign monetary values to business outcome improvements.
- ❖ **CALCULATING** and communicating the value of intangible improvements influenced by training.
- ❖ **ANALYZING** data, tabulating costs, and calculating the actual ROI.
- ❖ **APPLYING** the acid test to analyze and communicate the quality of ROI.
- ❖ **FORECASTING** the performance improvement required to achieve a credible ROI.
- ❖ **COMMUNICATING** results and educating clients about performance.

ABOUT YOUR WORKSHOP FACILITATOR



Ron Drew Stone is an author, international consultant, presenter, coach, and one of the world's most recognized and accomplished authorities on improving performance and measuring results. He is President of the Center for Performance and ROI. Ron provides consulting services in human performance, linking training to organization business outcomes, designing training for results and ROI, conducting training needs analysis, and measuring program results.

He has trained and coached clients on five continents. He has worked with clients in APAC such as; Pfizer, Hong Kong Jockey Club, Astrazeneca, Siemens, Baxter, Schaeffler, Zoetis, and Schneider. A sample of North America clients include: *Private Sector*: Pepsi; Wachovia Bank; Bristol-Myers Squibb; Volvo North America; Harley-Davidson; AT&T; Genentech; Time-Warner Telecom; Amazon.com; SaskTel Canada; GlaxcoSmithKline; Safeway. Ron has over 25 years of diverse experience in economic development,

engineering, training, and the human resource function. He received the Pioneer Award from the Alabama Healthcare Council for his leadership of a three-year community change initiative.

Ron served as chair of the Edison Electric Institute's Executive Leadership Program for senior officers in the electric utility industry. He has designed executive programs for The University of Georgia and Auburn University. He has a BBA from Georgia State University. He has authored five books including: "The Real Value of Training - Measuring and Analyzing BusinessOutcomes and the Quality of ROI, McGraw-Hill, NY, NY." His case studies and articles have been published in professional publications by ATD, ISPI; the Institute of Industrial Engineers, and Chief Learning Officer magazine. He is a certified change consultant and a certified measurement and ROI professional.

A FEW TESTIMONIALS

- "I've attended many courses before, but you are the one who makes me think more." **HR manager, L& D, Evonik Degussa (China) Co., Ltd.**
- "He is a true expert!! If you can't learn measurement from Ron, then you will never learn it from anybody." **Training Manager, BP China.**
- "A lot of tools & templates and excellent organization." **Manager, Learning Institute, AP, York International.**
- "Very systematic and practical." **Organization Capability Manager, Guangzhou Pepsi-cola.**
- "It was a privilege. A world class learning experience and a practical and professional workshop." **Alan, Leadership Knowledge Consulting, India.**

AGENDA

DAY ONE

9:00 WELCOME

INTRO AND ROI OVERVIEW

- > *Activity:* Build the ROI model from 30,000 feet
- > Brief Discussion - Pre-work

THE BEGINNING: HOW TO ENHANCE RESULTS AND IMPROVE THE ROI OF TRAINING

- > Top 10 reasons people don't apply what they learn – even when they know how
- > Using the performance centered framework to talk performance with clients > Finding the secret sauce
- > Influencing active management reinforcement (AMR)

Morning Coffee & Networking

APPLYING THE APPROPRIATE LEVEL OF TRAINING EVALUATION BASED ON ORGANIZATION OBJECTIVES AND PRIORITIES

- > Four components of evaluation framework to assess training effectiveness
 - Initial reaction, Readiness, Execution, Business outcome and ROI
- > The criteria for selecting programs for evaluation
- > *Practical Activity:* Applying the evaluation strategy to your training projects

12:30 LUNCH

APPLY EACH COMPONENT OF THE ROI METHODOLOGY

- > Case Study
- > *Activity:* Teams identify and discuss the issues and evaluation methods of measurement case study

AIM FOR RESULTS: ROI ENABLING TECHNIQUES

- > Linking hard and soft data to the business
- > Eliminating performers' ineffective habits
- > *Activity:* Identify how your training links to the business
- > Teams brief to class
- > *Activity:* Exercise – Develop objectives and measures
- > Teams brief results to class

Afternoon Coffee & Networking

BEST PRACTICES IN COLLECTING AND DOCUMENTING RELEVANT PERFORMANCE DATA

- > The five C's of data collection: How to optimize a successful data collection effort
- > The twelve guiding principles of data collection, analysis, and reporting
- > Eight best practice methods to collect credible data
- > *Activity:* Teams identify and discuss the pro's and con's of four data collection methods: Focus groups; interviews; observation; and questionnaires
- > *Ten* typical data collection sources and the credibility of each
- > *Activity:* Teams identify approaches (why, how and when) to collect baseline and follow-up data
- > Five steps to develop a successful data collection strategy
- > Twelve key focus areas to collect performance data
- > Review sample follow-up performance questionnaire
- > *Activity:* Develop key follow-up questions
- > *Case Scenario:* Analyze data and calculate ROI using an Action planning process

DECIDING ON A DATA COLLECTION STRATEGY

- > *Activity:* Begin development of Evaluation Strategy and Plan

17:00 CELEBRATE THE LEARNING EXPERIENCE AND INTRODUCE FOLLOW-UP VIRTUAL NETWORKING

DAY TWO

9:00 FUN REVIEW

ANALYZE AND ADJUST RESULTS FOR CAUSAL INFLUENCES

- > Three credible methods to determine causal influence
- > *Activity:* Identify methods to determine causal influence and reasoning for each approach
- > *Case scenario:* Comparison groups
- > *Case scenario:* Conditional trend analysis
- > *Case scenario:* Credible source estimates
- > *Activity:* Utilize job aid to make causal influence decision

Morning Coffee & Networking

ANALYZE AND ADJUST RESULTS FOR SUSTAINED IMPACT

- > How and why three sustaining adjustments influence the credibility of a ROI evaluation
- > *Activity:* Identify/discuss how to determine sustained impact
- > *Case scenarios:* *One-time Impact; Recurring Impact; Turnover Loss Adjustment*
- > Revisit and reinforce key analysis issues

THE ROI CALCULATION DECISION – TO BE OR NOT TO BE

- > Five reasons not to calculate the ROI of training
- > Four reasons to calculate the ROI of training

ASSIGNING MONETARY VALUES TO DATA

- > Three credible approaches to assign monetary value to business outcome data
- > Known values
- > Value by association
- > Credible source estimates
- > Determining unit value
- > *Several case scenarios:* Assigning monetary values
- > *Activity:* Calculating the required improvement factor
- > *Activity:* Assigning monetary values to performance data

12:30 LUNCH

ALTERNATIVE NON ROI METHODS FOR MEASURING THE CONTRIBUTION OF TRAINING

- > The significance of intangible results
- > How to express intangibles
- > Conducting Outcome Quality Analysis of intangible data

IDENTIFYING LOADED COST OF THE TRAINING SOLUTION

- > Differentiating direct costs and pro-rated costs
- > *Activity:* Identify fully loaded costs > *Activity:* Direct costs and pro-rated costs

Afternoon Coffee & Networking

THE DECEIVING NATURE OF ROI AND THE ACID TEST

- > Analyzing the seven key variables
- > *Activity:* ROI Quality Analysis

PITFALLS IN ANALYZING AND REPORTING ROI RESULTS

- > "Dos and Don'ts" of calculating and reporting ROI
- > Confessing the good, bad, and ugly about ROI
- > Communicating the complete story about results

ADDRESSING BARRIERS AND INEFFECTIVE HABITS

- > *Activity:* Teams discuss and identify organization barriers to executing measurement projects
- > *Activity:* Individuals identify their personal ineffective habits that are barriers to executing measurement projects

16:30 CELEBRATE THE LEARNING EXPERIENCE AND INTRODUCE FOLLOW-UP VIRTUAL NETWORKING

- > *Activity (45 minutes):* Teams present stand-up presentation to class using visual alignment learning map

17:00 ADJOURN