



# Measuring Return on Investment Certificate

Connect your learning investment to the business bottom line.

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Certificate of Completion



Face-to-Face and Live Online Courses



2 Days to Complete or 18 Hours Online



Focused on a Topic Within One Area of Expertise (AOE)

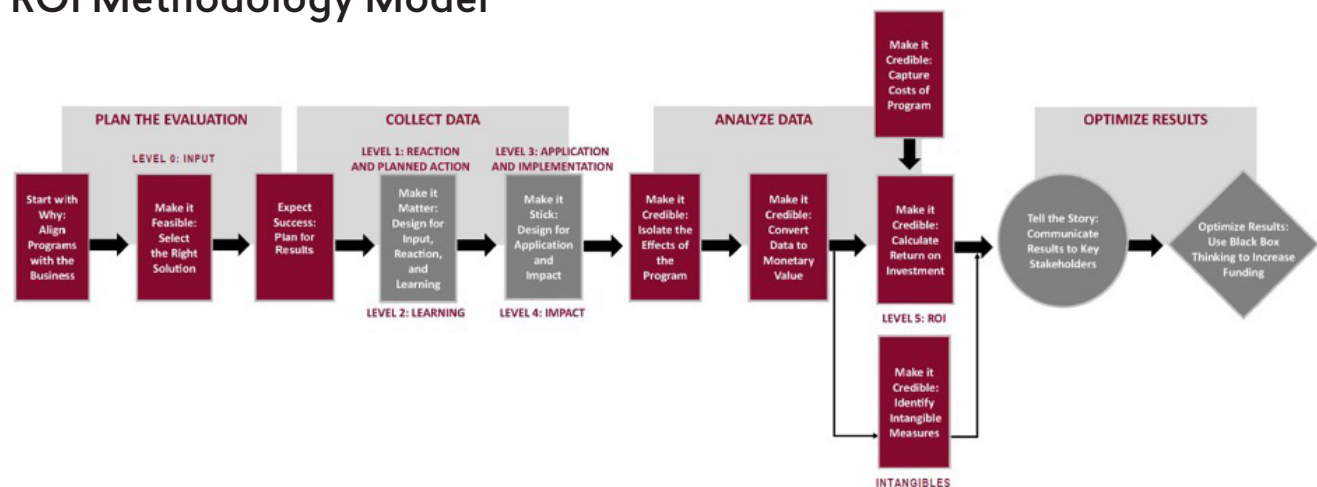


On-Site Offerings Available

**Training's return on investment (ROI) is often top of mind for business leaders. That's why developing the skills needed to create and deliver effective ROI evaluations should be at the top of your to-do list.**

In this ROI training you will learn to apply the Phillips ROI Methodology techniques to learning and performance solutions. This includes isolating the impact of your program on business measure improvements, converting those improvements to money, and calculating the ROI.

## ROI Methodology Model



© ROI Institute, Inc.

**ATD partnered with the ROI Institute to enable you to build an effective ROI plan for your organization.**

### Evaluation Planning

- Develop/Review Objectives in Program
- Develop Evaluation Plans and Baseline Data

### Data Collection

- Collect Data During Program Implementation
  - » Level 1: Reaction and Planned Action
  - » Level 2: Learning and Confidence
- Collect Data After Program Implementation
  - » Level 3: Application and Implementation
  - » Level 4: Business Impact

### Data Analysis

- Isolate the Effects of the Program
- Convert Data to Monetary Value
- Calculate ROI
- Level 5: ROI
  - » Capture Costs of Program
  - » Identify Intangibles

### Reporting

- Generate Impact Study Report



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## Derived From ATD Research, Backed by Our Competency Model

**ATD's Measuring Return on Investment Certificate program follows the key knowledge and actions defined by research that anyone doing evaluation work must follow to be successful and to meet business needs.**

Join this program to develop the skills needed to create and deliver effective ROI evaluations for learning and performance, organization development, human resources, technology, change, and quality solutions.

### **In this program, you will:**

- Apply ROI techniques to measure the impact of learning and performance solutions in order to gain senior leadership buy-in.
- Link your learning program objectives to business results.
- Develop an evaluation plan for one of your own programs to improve your evaluation processes back on the job.

### **After this program, you will be able to:**

- Update internal processes on evaluation.
- Develop application and impact objectives.
- Develop data collection plans and select appropriate data collection methods.
- Use appropriate methods to isolate the effects of programs.
- Use appropriate methods to convert data to monetary values.
- Tabulate appropriate program costs.
- Calculate the ROI.
- Identify intangible benefits.

## Related Learning Offerings

### **Adaptive Learning Certificate**

*Deliver better outcomes using personalized, mastery-based learning.*

### **ATD Master Performance Consultant Program**

*Analyze performance gaps. Deliver impactful solutions. Foster exemplary performance.*

### **Designing Visuals for Learning Certificate**

*Produce extraordinary visual learning materials that get results.*

### **Evaluating Learning Impact**

*Prove the value of your learning investments.*

### **Facilitation Skills Certificate**

*Apply advanced-level facilitation skills to increase your professional credibility.*

### **Training Design and Delivery Certificate**

*A five-day instructional design and training delivery boot camp.*





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## COURSE OVERVIEW

### MODULE 1

Introduction and  
Readiness to Learn

### MODULE 2

ROI Process  
Review

### MODULE 3

Evaluation Planning  
Overview

### Module 1: Introduction and Readiness to Learn

- Introduction and Readiness to Learn
- Key Questions
  - Case Study: Reliance Insurance Company
  - Definition of Results-Based Training Activity
- Defining Benefit/Cost Ratio and the Return on Investment
- ROI Target-Options

### Module 2: ROI Process Review

- ROI Process Overview
- Pieces of the Results-Based Puzzle Activity
- Levels of Evaluation for Performance Solutions
- The ROI Process Model Activity
- The Phillips ROI Methodology
- Chain of Impact
- All Programs Are Not Evaluated at All Levels Activity
- Criteria for Selecting Programs for Level 4 and Level 5 Evaluations
- Matching Evaluation Levels With Objectives Activity
- Measurement in Learning and Performance
- What Can You Do With the ROI Process?
- Characteristics of Evaluation Levels

### Module 3: Evaluation Planning Overview

- Evaluation Planning Overview
- Evaluation Planning Worksheet Activity
- Overview of Hard Data
- Overview of Soft Data
- Developing Objectives of the Solution
- Results-Based Approach
- The Alignment Process
- PAC Inc. Activity
- API Inc. Activity
- Matching Evaluation Levels With Objectives Activity
- Develop Reaction and Satisfaction Objectives
- Developing Learning Objectives
- Developing Application Objectives
- Developing Impact Objectives
- Developing Evaluation Plans and Baseline Data
- Collecting Baseline Data
- Develop Evaluation Strategy and Plans Activity
- Factors to Consider When Developing an Evaluation Strategy
- Sample Data Collection Plan
- Sample ROI Analysis Plan



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## COURSE OVERVIEW

### MODULE 4

Data Collection  
Overview

### Module 4: Data Collection Overview

- **Data Collection Overview**
- **Collect Data During Solution Implementation**
  - Level 1 Target Areas Activity
- **Improving Level 1 Evaluation**
- **Common Uses of Level 1 Data**
  - Planned Improvement Questions for Feedback Questionnaires Activity
- **Techniques for Measuring Learning**
- **Common Uses of Level 2 Data**
- **Improving Level 2 Evaluation**
- **Collect Data After Solution Implementation**
  - Applications of Data Collection Instruments Matching Activity
- **Methods of Collecting Follow-Up Data**
  - Follow-Up Questionnaire Content Issues Checklist
  - Questionnaire Items Example: Cyber International Activity
  - Chain of Impact Questions Activity
- **Improving the Response Rate for Questionnaires**
- **Developing ROI With Action Planning**
- **Action Plan**
  - ROI Application: Leadership 101 Activity



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## COURSE OVERVIEW

**MODULE 5**  
Data Analysis  
Overview

**MODULE 6**  
Reporting  
Overview

**MODULE 7**  
Implementation  
Issues Overview

### Module 5: Data Analysis Overview

- **Data Analysis Overview**
- **Isolating the Effects of the Solution**
- Case Study: First Bank
- Isolating the Effects of the Program Matching Activity
- **Several Factors Contribute to an Improvement After a Program Is Conducted**
- **Techniques to Isolate the Effects of Programs**
- **Use of Control Groups Example—Customer Service Training**
- Case Study: Micro Electronics Inc.—Use of Trend Line Analysis
- Case Study: National Bank—Use of Estimates
- **The Wisdom of Crowds**
- **Isolating the Effects**
- Credibility of Data Activity
- Credibility of Outcome Data Activity
- **Converting Data to Monetary Values**
- Converting Data to Money Matching Activity
- **Methods of Converting Data to Monetary Values**
- **Job Aid: Calculating the Value of an Improvement**
- **Converting Data Using External Database**
- Package Delivery Company Application Activity
- Converting Data Activity

- **To Convert or Not to Convert**
- **Capturing the Costs of the Solution**
- Overview of Tabulating Costs Activity
- **Prorated vs. Direct Costs**
- **Cost Tabulation Guidelines**
- **Calculating the Return on Investment**
- Different Approaches to Measure the Financial Payoff of Learning Activity
- **Defining the Benefit–Cost Ratio**
- **Defining the Return on Investment**
- **Defining the Payback Period**
- 12 Guiding Principles Activity
- **A Rational Approach to ROI**
- **Identifying Intangible Benefits**
- **Common Intangible Variables Linked With Programs**
- **Why Intangibles Are Important**
- **Sources for Intangible Benefits**

### Module 6: Reporting Overview

- **Reporting Overview**
- Case Application: Utility Services Company
- **Common Target Audiences**
- **Impact Study Outline**
- **Scorecard: Seven Categories of Data**





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## Module 7: Implementation Issues Overview

- **Implementation Issues Overview**
- Management Influence Activity
- **ROI Dilemmas**
- Implementation Concerns Activity
- Cost-Saving Approaches to ROI Activity
- What Next? Activity
- **Key Implementation Actions**
- **Setting Evaluation Targets**

### Additional Tools and Resources:

- Turnover Costs Summary
- A Sample Size Table for Proportions
- Data Collection Plan
- ROI Analysis Plan
- Typical ROI Studies
- Learning and Development Programs Assessment: A Survey for Managers
- Interpreting the Learning and Development Programs Assessment
- *ROI Basics*, Patricia Pulliam Phillips, Jack J. Phillips, and B. Aaron, Alexandria, VA: ASTD Press, 2005.

## What Participants Are Saying

“I have rarely learned as much in two days as I did in ATD's Measuring Return on Investment Certificate Program. This program was excellent. I left the course confident in the knowledge that I will be able to apply the learning quickly, easily, and comprehensively.”

—Julie Stitt

Measuring Return on Investment  
Certificate Participant



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## RESOURCE SAMPLE

### Job Aid: Calculating the Value of an Improvement

To convert data to a monetary value, the following steps should be taken:

#### Step 1: Define and Focus on a Unit of Measure

What measure is the program influencing (for example, increase in sales, decrease in scrap, time savings)?

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#### Step 2: Determine the Value of Each Unit

What is the value of one unit of the measure (such as one unit of sales, one unit of waste, one hour of time savings)?

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#### Step 3: Calculate the Change in Performance Data

How much did the measure change during the reporting period?

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#### Step 4: Determine the Annual Amount of Change in Performance

What is the improvement in the measure over the first year (for example, five units of waste reduction per month x 12 = 60 units annual improvement)?

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#### Step 5: Calculate the Total Annual Value of the Improvement

The value of one unit of improvement multiplied by the amount of annual change during the reporting period equals the total annual monetary value of the improvement.

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# Why Choose ATD As Your Professional Development Resource?

Over the last 75 years, our mission has been to empower talent development professionals with the knowledge and skills they need to be successful and remain competitive. We accomplish this by providing learning that sticks and leads to measurable results in your on-the-job performance.

## What You Can Expect From an ATD Course

- ✓ Research- and competency-based learning with applied adult learning principles
- ✓ Hands-on practical activities
- ✓ An engaging environment that builds confidence and makes learning personally relevant
- ✓ Actionable take-home materials to ensure real application back at work

**95+**  
Course  
Topics



**900+**  
Organizations  
Have Trained  
With Us



**120+**  
Countries  
With  
an ATD  
Presence



**100,000+**  
Professionals  
Have Learned  
With ATD  
Education



## Ready to Get Started?



### Register by Phone or Get a Consultation

Not sure what to take?  
Call a professional development specialist to help you enroll. They can give you course recommendations based on your learning goals and your role.

Call: **855.404.2783**

Visit: **[www.td.org/learningpath](http://www.td.org/learningpath)**



### Register Online

- Visit **[www.td.org/measuringreturnoninvestmentcert](http://www.td.org/measuringreturnoninvestmentcert)**.
- **Choose** your preferred dates and times.
- **Click** Enroll.
- **Follow** the cart and checkout prompts.



### Register a Team/ On-Site Training

Interested in bringing a course to your company as an on-site learning event?

Call: **888.816.7813**

Email: **[enterprise@td.org](mailto:enterprise@td.org)**

**We Are Here to Help You and Your Team Learn, Grow, and Improve!**



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