

## Index

### A

Annual progress reviews, 149–150  
Audience. *See* Target audience

### B

Balanced scorecard. *See* Macro-level scorecard  
Barriers to implementation, 20  
Best-practice meetings, 23–24  
Block, P., 30  
Brochures, 27  
Business impact, 20  
Business update meetings, 24

### C

California ROI Network, 111  
Case studies  
  example of, 29–30  
  ROI sustainability using, 147–149  
  uses of, 28  
Communication  
  analysis of the need for, 6–9  
  analysis of reactions to, 39–40  
  five key reasons to be concerned with, 1–5  
  and monitoring ROI evaluation progress, 128  
  planning, 9–13  
  principles of results and, 3–6  
  selecting the audience for, 13–17

### Communication media

  brochures, 27  
  case studies, 28–30  
  e-mail and electronic media, 27  
  meetings, 21, 23–24  
  organizational publications and communication tools, 25–27  
  progress reports, 24–25  
Communication plan  
  for entire program, 10–11  
  establishing policies for, 9–10  
  for feedback, 31  
  for impact study, 11–13

### Communication process

  communicating with executives and sponsors, 38–39  
  continual feedback provided during, 30–33  
  impact study presented to senior management, 34–38  
Consistent communication, 5  
Cost-saving implementation  
  importance of developing, 90  
  recommended approaches to, 95, 97–98

### D

Data collection/analysis (impact study), 18–19

172 Index

**E**

E-mail communication, 27  
Effective media selection, 5  
Electronic media, 27  
Executive summary, 17  
Executives. *See* Senior management

**F**

Feedback  
action plan for, 31  
providing continual, 30, 32–33

**I**

Impact study  
communication used for, 11–13  
format of, 22  
presented to senior management,  
34–38  
sample streamlined, 37  
sections and information included  
in, 17–21  
Implementation. *See* ROI  
Methodology implementation  
Infrastructure support. *See*  
Organization infrastructure  
Intangible measures, 20

**J**

Jaffe, D., 135

**K**

Kaplan, R., 40

**L**

Learning and development  
management involvement in, 127  
organizational standardization of,  
77–90  
reporting on, 19  
ROI Methodology as tool for, 90,  
115  
Learning/development  
standardization  
1: overview of process, 77–79  
2: procedures for, 79–81

3: resources, roles, and  
responsibilities, 81–83  
4: measurement and verification  
of, 83–85  
5: review of process effectiveness,  
85–87  
6: document control information,  
87  
7: document list, 87  
Lessons Learned Report, 153,  
154–161

**M**

Macro-level scorecard  
advantages of, 42  
creating, 41–42  
description of, 40–41  
example of, 42–45  
Manager meetings, 23  
*See also* Senior management  
Managers  
developing ROI leaders among,  
104–106  
identifying ROI champions  
among, 103–104  
learning and development  
involvement by, 127  
preparing and training, 121–127  
as target audience, 122–123  
*See also* Senior management  
Media selection, 5  
Meetings, 21, 23–24  
Monitoring ROI evaluation, 128

**N**

Norton, D., 40

**O**

Opinions, 6  
Organization infrastructure  
checklist of policy statement  
topics, 76  
cost-saving methods  
implementation as, 93, 96,  
97–98

- learning/development
  - standardization process, 76–90
  - project plan as, 90, 91–95
  - structuring ROI as learning tool, 90
  - transition step establishing, 66, 75–76
- Organizational readiness
  - SWOT analysis of, 56
  - worksheet for assessing, 54–55
- Organizations
  - assessing for ROI Methodology readiness, 53–56
  - certification workshop
    - participation by private sector, 107–108
  - certification workshop
    - participation by public sector, 109
  - establishing infrastructure
    - supporting ROI Methodology, 66, 75–94
  - reporting results through
    - publications of, 25–27
  - tapping into ROI network by, 110–112
- Overcoming resistance
  - addressing implementation
    - resistance, 116–117
  - importance and focus of, 47–49
  - process and steps for, 56–57
  - to ROI Methodology myths and fears, 56–64
  - transition plan for, 51–52
  - for typical ROI Methodology objections, 48
- P**
- Programs
  - creating macro-level scorecard of, 40–45
  - reporting costs of, 19
  - selected for ROI evaluation, 118–121
- Progress reports, 24–25
- Project plan
  - example of, 91–92
  - as part of transition, 90, 93
  - results-based transition, 93–95
- R**
- Reporting results
  - common target audiences of, 13–17
  - communication media used for, 21, 23–30
  - communication role in, 1–13
  - impact study used for, 11–21, 22
  - monitoring process and
    - communicating and, 128
  - of ROI evaluations, 121
- Resistance. *See* Overcoming resistance
- ROI certification, 105–108
- ROI evaluations
  - monitoring progress/
    - communicating results of, 128
  - reporting progress on, 121
  - selecting programs for, 118–121
  - selection tool for, 119
- ROI Institute, Inc., 105, 111, 149
- ROI leaders, 104–106
- ROI Methodology
  - best practices for, 161–165
  - as learning tool, 90, 115
  - macro-level scorecards created
    - using, 41–45
  - myths, fears, and false assumptions
    - about, 57–64
  - overcoming resistance to, 47–52, 56–64, 116–117
  - transition issues of, 50–52
  - transition-planning steps for, 52–94
  - typical objectives to, 48
- ROI Methodology implementation
  - assessing organizational readiness
    - for, 54–56
  - barriers to, 20

174 Index

- ROI Methodology implementation (*Continued*)
    - calculating ROI of, 150–151
    - causes of ineffective, 132–134
    - checklist for, 167
    - consistency and efficiency issues of, 50
    - cost-saving approaches to, 96, 97–98
    - impact study reporting on, 19
    - as key to success, 49
    - stages of, 131, 135–147
  - ROI Methodology implementation issues
    - assignment responsibilities, 106, 108, 109–110
    - developing evaluation targets for staff, 112–114
    - developing the ROI leader, 104–106
    - identifying a champion, 103–104
    - monitoring progress and communicating results, 128
    - overview of, 102–103
    - preparing the management team, 121–127
    - preparing the program staff, 114–117
    - ROI certification, 105–109
    - selecting programs for ROI evaluation, 118–121
    - tapping into a network, 110–112
  - ROI Methodology implementation stages
    - 1: recognition, 131, 135–137
    - 2: reservation, 135, 137–141
    - 3: renewal, 135, 141–143
    - 4: integration, 135, 143–147
  - ROI Methodology sustainability
    - action planning for, 168
    - best practices developed for, 153, 161–165
    - calculating ROI on implementation, 150–151
    - challenges of, 130–131
    - establishing mechanisms for
      - continuous improvements for, 152–153
    - holding annual progress reviews for, 149–150
    - importance of, 129–130
    - Lessons Learned Report to facilitate, 153, 154–161
    - publishing case studies for, 147–149
    - reviewing staff roles for, 151–152
    - stages of implementation and, 131–147
  - ROI Methodology transition
    - issues related to, 50–52
    - overcoming resistance during, 51, 58–62, 63–64
    - step 1: assess readiness, 52–56
    - step 2: overcome resistance, 56–57
    - step 3: communicate a vision, 57, 62, 65–66, 67–74
    - step 4: manage the transition, 66
    - step 5: establish infrastructure to support process, 66, 75–98
  - ROI networks
    - description of, 110–111
    - internal, 111–112
    - local, 111
  - ROI (return on investment)
    - calculated on ROI Methodology, 150–151
    - reporting on the, 20
- S**
- Scott, C., 135
  - Senior management
    - building partnership between staff and, 122
    - communicating with sponsors and, 38–39

- developing ROI leaders among, 104–106
- identifying ROI champions among, 103–104
- learning and development involvement by, 127
- presenting impact study to, 34–38
- See also* Manager meetings; Managers
- Staff
  - developing evaluation targets for, 112–114
  - preparing partnership between senior management and, 122
  - preparing the program, 114–117
  - reviewing roles for ROI sustainability, 151–152
- Staff meetings, 23

## T

- Target audience
  - analysis of communication reactions by, 39–40
  - communication shaped by program team opinion by, 6
  - managements as, 122–123
  - selection of common program results, 13–17
- Targeted communication, 4
- Testimonials, 5–6
- Timely communication, 4
- Toronto ROI Network, 111

## U

- Unbiased communication, 5

## W

- Wachovia, 103–104

