

"Measuring ROI in Learning & Development assembles an incredible group of practitioners telling stories about defining real business results of real learning programs. Genuine data collection instruments and actual executive summaries are included, providing powerful examples for adaptation to my own projects. I've read more books, blogs, articles, and journals than I can count, searching for exactly this type of global, transparent, business-aligned collection of true examples of ROI in action, and this book stands out as the best resource to date."

Laura Rexford, Manager, Client Loyalty
SkillSoft Corporation

"Impact evaluation on people development projects speaks to a culture of accountability. This book of global case studies take readers on a journey that translates the concept into practical application – unpacking 'how' across industries and countries. People who lead, fund, participate in, and benefit from learning and development will experience the realness of impact evaluation. A worthwhile read."

Esta Viviers, Director
Connemara Consulting

"This book is a truly monumental effort as it covers varied business scenarios in all kinds of organizations and from all parts of life. Each chapter teaches us about the ROI process being applied to various training efforts. I was impressed by the approaches, tools, and above all – the results of the efforts in money terms. I will always have this book handy at my workspace."

Bhaskar Bhattacharya
Executive Director – Organization & Leadership Development
Nielsen, for Asia Pacific, Middle East, and Africa

"Patti and Jack Phillips have done it again. As learning and development professionals struggle to prove their value in a tough economy, Patti and Jack have assembled an excellent case study book to underscore the value of ROI – and how to do it. If you are a practitioner, you cannot afford to miss this book."

William J. Rothwell, PhD, SPHR
Professor, Pennsylvania State University



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ROI INSTITUTE™

ISBN 978-1-56286-799-7



5 3895

9 781562 867997

071115.62220

Measuring ROI in Learning & Development

Patricia Pulliam Phillips and
Jack J. Phillips, editors

ROI INSTITUTE™



MEASURING ROI IN LEARNING & DEVELOPMENT

Case Studies from Global Organizations

Patricia Pulliam Phillips and
Jack J. Phillips, editors



Measuring ROI in Learning & Development

How do you accurately and effectively measure return on investment (ROI) in training and performance improvement?

Measuring ROI in Learning & Development, a new volume of case studies of 15 organizations from 11 countries, provides detailed information on how to create, develop, and sustain a comprehensive ROI evaluation system. A focus on accountability in measuring ROI in learning and performance improvement programs has produced a book filled with functional, pragmatic suggestions and examples that can be implemented in the real world.

Specific topics covered include:

- examination of selected case studies, many of which employ the ROI Methodology
- definition and discussion of the ROI Methodology, and suggestions on how to best implement it
- exploration of best practices in measurement and evaluation of ROI
- discussion of various ROI data collection plans
- coverage of data analysis strategies and program assessment protocols
- analysis of program costs.

Measuring ROI in Learning & Development provides everyone who has a personal or professional interest in developing effective ROI metrics with a solid foundation on which to build practical ROI measuring programs.

MEASURING ROI IN LEARNING & DEVELOPMENT

Case Studies from Global Organizations

Patricia Pulliam Phillips
and Jack J. Phillips, editors



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19 18 17 16 15 2 3 4 5 6 7 8 9 10

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Ordering information: Books published by ASTD Press can be purchased by visiting our website at store.astd.org or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 2011943854

ISBN-10: 1-56286-799-7

ISBN-13: 978-1-56286-799-7

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Cover Design: Mazin Abdelgader

Printed by United Graphics, LLC, Mattoon, IL, www.unitedgraphicsinc.com

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Preface

Since the publication of volume 1 of ASTD's *In Action* series, titled *Measuring Return on Investment*, the interest in measuring the return on investment (ROI) in training and performance improvement has grown exponentially. Volume 1 filled an important void in the training literature. Published in 1994, it remains one of ASTD's all-time bestsellers. This new publication places emphasis on the international arena with case studies from a dozen different countries.

In our visits to more than 25 countries each year, we have been impressed with the work with ROI outside the United States. We also have noticed that the issues involved in creating, developing, and sustaining a comprehensive evaluation system are similar from one country to another.

This publication includes global case studies that are at the forefront of measurement and evaluation. It introduces more examples of how ROI is being applied in a variety of settings and countries. The authors of these case studies are diligently pursuing accountability in learning and performance improvement programs. Through their writing, they share their experiences with a process that continues to be at the forefront of measurement and evaluation.

TARGET AUDIENCES

This book should interest anyone involved in learning and development, human resources (HR), and performance improvement. The primary audience is practitioners who are struggling to determine the value of programs and to show how programs contribute to the strategic goals of an