Hit the Mark!

MEASUREMENT & ROI for Advancement Professionals
Question for the Day

“Who measures events?”
Measurement in Action
Satisfaction:

4.43 Avg. Score

“I thought the meetings we had were very successful and useful during the trip. However, I do feel that we sometimes got off-track and thus didn’t get as far into the process of defining a production/sales process and job accountabilities as I thought we might.”

Positive Response: 91%

Learning:

4.43 Avg. Score

“I believe that in the long term, EOS will make us a more efficient company. However, in the short term, as we implement EOS, we may be more inefficient as we work through the bumps.”

Positive Response: 84%

Cumulative Positive Response: 88%

Avg. Score: 4.41
KEY FINDINGS

- The meetings were successful as measured by ratings for Reaction and Learning objectives.
- 20% of staff do not completely understand roles and accountabilities.
- All staff believe organizational work will lead to better efficiency and client satisfaction.
- All staff are excited about their future at Creative Visions.
- 90% of staff enjoy working at Creative Visions (average score of 8.8/10).
ENABLERS OF SUCCESS

1. Staff found content very relevant and useful
2. High level of participant involvement
3. High confidence in organizational development initiatives
4. Most staff successfully identified two specific actions to take as a result of attending

BARRIERS TO SUCCESS

1. One third of attendees did not increase trust among co-workers
2. 20% of staff stated value was not worth total investment of time
3. Some respondents cautioned that organizational improvement will take time
Action Plan

- Finalize accountability chart, distribute, and socialize
- Convey key findings and next steps with staff
- Establish realistically-paced organizational improvement objectives
- Research levels of trust among the team and determine if action is required
- Acknowledge and celebrate successes
Todd Hanson, CPIM, CRP
Chief Engagement Officer
Creative Visions
Session Objectives

• Why event results should be measured
• How to follow ROI Methodology™
• What to measure
• Get started!
ROI
The Event Process
Why Measure?

IMPROVE

- Evaluate Effectiveness
- Identify Enablers
- Identify Barriers
- Develop Solutions
- Implement Change
Event Painkillers

How To Create A Vision For Your Event

creativevisions.com
## What to Measure: The 5 Levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Measurement Focus</th>
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</thead>
<tbody>
<tr>
<td>1. Reaction &amp; Planned Action</td>
<td>Measures participant satisfaction with the program and captures planned actions</td>
</tr>
<tr>
<td>2. Learning/Understanding</td>
<td>Measures changes in knowledge, skills, and attitudes</td>
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<tr>
<td>3. Application</td>
<td>Measures changes in on-the-job behavior</td>
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<tr>
<td>4. Impact</td>
<td>Measures changes in critical outcomes</td>
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<tr>
<td>5. Return on Investment</td>
<td>Compares program benefits to the costs</td>
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</tbody>
</table>
Chain of Impact

LEVEL 1
REACTION/SATISFACTION

LEVEL 2
LEARNING/UNDERSTANDING

LEVEL 3
APPLICATION/IMPLEMENTATION

LEVEL 4
IMPACT

ROI
Chain of Impact

- **INITIAL ANALYSIS**
  - Payoff Needs
  - Business Needs
  - Performance Needs
  - Learning Needs
  - Preference Needs

- **MEASUREMENT & EVALUATION**
  - ROI Objectives
  - Impact Objectives
  - Application Objectives
  - Learning Objectives
  - Reaction Objectives

- **PROJECT**
  - The ROI Process Model

- **START HERE**
  - Payoff Needs
  - Business Needs
  - Performance Needs
  - Learning Needs
  - Preference Needs

- **END HERE**
  - ROI
  - Impact
  - Application
  - Learning
  - Reaction
Let’s Go!
<table>
<thead>
<tr>
<th>LEVEL</th>
<th>PROGRAM OBJECTIVES</th>
<th>MEASURES</th>
<th>DATA COLLECTION METHOD/ INSTRUMENT</th>
<th>SOURCES</th>
<th>TIMING</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SATISFACTION/ PLANNED ACTION</td>
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<td>2</td>
<td>LEARNING</td>
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<td>APPLICATION</td>
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<td>BUSINESS IMPACT</td>
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Event Painkillers

How To Design A Good Event Evaluation
ROI Methodology™

Evaluation Planning
- Develop Objectives of Solutions(s)
  - *Input/Indicators
- Develop Evaluation Plans and Baseline Data
  - *Reaction and Planned Action
  - *Learning and Confidence

Data Collection
- Collect Data During Solution Implementation
  - *Application and Implementation
  - *Business Impact
- Collect Data After Solution Implementation

Data Analysis
- Isolate the Effects of Solution
- Convert Data to Monetary Value
- Calculate the Return on Investment
  - *ROI
- Identify Intangible
  - *Intangibles
- Capture Costs of Solution

Reporting
- Develop Report and Communicate Results
Sample Dashboard

**LEARNING**
Measures change in knowledge, skills, and attitudes related to training content.

**ENGAGEMENT**
Measures level of trust, confidence, and support from CT&D.

**REACTION**
Measures participant satisfaction with the training.

**TOTAL EVENTS**
70

**LEARNERS PER EVENT**
18.71

**HOURS PER EVENT**
597.06

**SPEND PER LEARNER**
N/A
Resources

• www.ROIofEngagement.com
• www.ROIInstitute.net
• Event PainKillerTM “How to Get Great Response Rates”
• Data Collection Plan
• Improving Response Rates Article
• “Return on Investment in Meetings and Events” Phillips
• “Proving the Value of Meetings and Events” Phillips
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• toddh@creativevisions.com
Let’s Go!