

# performance evaluating engage process **The Bottomline** learning accountability **on ROI** analyze measuring

**ROI** INSTITUTE™

## A One-Day ROI Competency Building Workshop

### Workshop Overview

This one-day workshop introduces the concept of ROI, the fastest growing metric for evaluating HR and learning and development. Participants are exposed to the ROI Methodology, which includes developing objectives, collecting data, isolating the effects of the program, converting data to monetary values, tabulating appropriate program costs, and calculating the ROI. Participants quickly see the advantage of using ROI as six types of data are collected and analyzed. This workshop takes the mystery out of the use of ROI.

### Workshop Learning Objectives

- Identify the drivers for ROI
- Make the business case for ROI
- Develop program objectives at multiple levels
- Explain to clients how ROI works
- Identify 7 of 12 guiding

### principles

- Describe the 10 steps in the ROI Methodology
- Plan next steps

### Benefits of the ROI Methodology

- Align programs to business needs
- Show contributions of selected programs
- Earn respect of senior management/administrators
- Justify/defend budgets
- Improve support for programs
- Enhance design and implementation processes
- Identify inefficient programs that need to be redesigned or eliminated
- Identify successful programs that can be implemented in other areas

### Who Should Attend?

This workshop is for anyone in an organization who is interested in knowing more about measuring the success of HR and learning and development, particularly at the ROI level. The workshop focuses on the process to effectively conduct ROI studies. Individuals who should attend are:

- Learning and Development Managers
- Management Development Specialists
- HR Managers
- Performance Consultants
- Facilitators
- Learning Advisors
- Analysts
- HR Coordinators
- Organizational Development Specialists

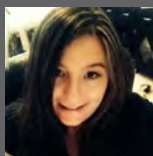
### Materials You Will Receive:

- The Bottomline on ROI: Benefits and Barriers to Measuring Learning, Performance Improvement, & Human Resource Programs. 2nd Ed. (HRDQ, 2012) by Patricia Pulliam Phillips.
- Participant workbook, complete with exercises and exhibits
- ROI Process Model

## Workshop Leader:

**Barbra J. Portzline, Ph.D., Director of Organizational Development, Entereza, Inc.**

With close to two decades of hands-on engagement in practicing, consulting, and teaching program evaluation, Barbra Portzline has first-hand experience in the ebb and flow of organizational growth and the pitfalls, challenges, opportunities and dynamics that fuel successful businesses. Her clientele is diverse ranging from government, education, health care, and community organizations to the corporate sector. Barbra is the published author of several articles on evaluation and is currently writing a book on organizational culture. She teaches program evaluation at the University of New Mexico. With a background in both clinical psychology and program evaluation she brings rich expertise, a deep understanding of the underlying subtleties present in the workplace, an entrepreneurial spirit, a passion to educate and the sheer talent required to work within complex organizational structures. Her work supports a cross-discipline, integrated approach to strategy, based on real-time data collection and analysis.



**Class Size is Limited: Register Early**

February 19, 2015  
8:30 am – 3:30 pm  
\$395 per person

Call 505.254.3700 Extension 100  
or email [learning@entereza.com](mailto:learning@entereza.com) to register



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