

## BOTTOM-LINE OD: A CERTIFICATE PROGRAM FOR IMPROVING ROI

### Overview

Return on Investment (ROI) has become the “silver bullet” of OD and HR. Indeed, nearly every OD and HR practitioner recognizes its importance. The challenge for most practitioners has been how to integrate ROI into their change process. To that end, Linkage is proud to offer, in exclusive partnership with acclaimed ROI and strategic change expert Dr. Merrill Anderson of MetrixGlobal, LLC, *Bottom-Line OD: A Certificate Program for Improving ROI*.

This two-day immersion program certifies OD and HR professionals in the leading-edge concepts of ROI as an essential element of the change process.

Topics that will be explored include:

- Understanding how ROI and change are integrated
- Building a business case for change and/or training initiatives
- Linking organizational goals to initiative objectives

Learn how to utilize an approach that fully integrates ROI and change, while employing state-of-the-art qualitative and quantitative tools and techniques to your initiatives

### Who Should Attend

OD, HR, learning, and change professionals who want to learn how to improve the ROI of their initiatives by gaining the valuable knowledge, skills, and tools to develop an effective evaluation strategy and collect the required data for a credible ROI analysis

### Benefit & outcomes

- Learn how to forecast ROI for people and change initiatives
- Utilize evaluation methodology to measure and better manage human capital
- Receive and learn how to use the **ROI Tutorial™** and the **ROI Estimation Tool™**

### Program Curriculum

#### I. Pre-Work

Participants receive and read a comprehensive ROI evaluation of a performance management initiative as they prepare their learning objectives.

#### II. Core Curriculum

Participants are organized into learning teams to work through case studies to gain know-how in topics such as:

- Estimating and forecasting ROI
- Leveraging evaluations to drive greater value from the initiatives
- Conducting post-program ROI evaluations

#### Day 1 Morning

- Opening and introductions
- Strategic change valuation process
- ROI and types of monetary benefits
- Case study 1, Part 1: Gaining the go-ahead for performance management
- Setting objectives for the initiative
- ROI estimation
- Case study 2: Estimating ROI

#### Day 1 Afternoon

- Case study 1, Part 2: Forecasting ROI
- Overview of the five steps to forecasting ROI
- Leveraging ROI forecasts
- The three strategies for showing the business impact of the initiative
- Thorny issues regarding data collection
- Building credibility for ROI analysis
- Survey research: Tips of the trade
- ROI estimation examples
- Recap and preview of day 2

## Day 2 Morning

- Opening and day 1 learnings
- Conducting a post-program ROI study
- Conducting a value interview
- Case study 3: The ROI of executive coaching

## Day 2 Afternoon

- Case study 4: The ROI of E-learning
- Capturing intangible benefits
- Communicating the results
- Challenges evaluators face – and how to deal with the challenges
- Requirements for certification
- Course debrief and evaluation
- Adjourn

## III. Hands-On Post-Work

After completing the *Bottom-Line OD: A Certificate Program for Improving ROI*, participants will have the opportunity to take part in two coaching conference calls with the facilitator and their learning teams.

The first call explores participant's ideas on applying concepts learned during the *Bottom-Line OD* program to personal work responsibilities. In addition, this call provides a valuable opportunity to share best practices and receive coaching from the facilitator.

The second call provides participants with an opportunity to share with their team what they have done, or what they are planning to do for their application project. This call provides an additional opportunity to gain insights and share perspectives on ways to apply the concepts, methods, and tools learned during the program.

## IV. Submission of Project for Certification

To complete the requirements for certification, participants must submit a project for review by Dr. Merrill Anderson and the team of senior facilitators from Linkage. Examples of application projects include:

- Developing an evaluation architecture that includes business goals, initiative objectives, and evaluation objectives
- Developing a data collection plan and collecting the required data
- Evaluating how effectively participants in an OD/HR initiative applied initiative material to their work place
- Conducting an ROI study or forecast

The project will be reviewed for completeness, quality, relevance to OD/HR evaluation, and impact on the organization.

## Special Feature

Participants will receive a copy of Dr. Merrill Anderson's book, *Bottom-Line Organization Development – Implementing and Evaluating Strategic Change for Lasting Value*.

Linkage Training Programs are approved by the following organizations

