

# ROI Certification

Date: 26<sup>th</sup> to 30<sup>th</sup> January 2020

Location: Muscat, Sultanate of Oman



**The #1 Source for measuring  
return on investment for projects,  
programs and initiatives**



**Jack J. Phillips, Ph.D.**

Dr. Jack J. Phillips is the Chairman of the ROI Institute and a world-renowned expert on accountability, measurement, and evaluation

## WHAT

- Utilize the five levels of evaluation
- Recognize the ten steps in the ROI Methodology
- Identify the twelve guiding principles
- List the eleven ways to collect data
- Explain the six ways to isolate the effects of programs
- Identify the eight ways to convert data to money
- Calculate the benefit- cost ratio (BCR) and the return on investment (ROI)
- Implement the ROI Methodology
- Build support for the ROI Methodology

## WHO

- Human Resources/Human Capital
- Training/Learning/Development
- Leadership/Coaching/Mentoring
- Knowledge Management/Transfer
- Recognition/Incentives/Engagement
- Change Management/Culture
- Talent Management/Retention
- Policies/Procedures/Processes
- Technology/Systems/IT
- Meetings/Events/Conferences
- Marketing/Advertisement/Promotion
- Organization Development/Consulting
- Project Management Solutions
- Quality/Six Sigma/Lean Engineering
- Communications/Public Relations

## WHY

- Certification provides assurance that the participant is capable of implementing the ROI Methodology and conducting ROI impact studies.
- This certification is the only process available to provide the employer with the evidence and assurance about your capability in measurement and evaluation, including return on investment.
- This certification is an important credential for professionals who are charged with evaluating major programs.

**TO REGISTER**

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## Facilitator: Jack J. Phillips, Ph.D.

Dr. Jack J. Phillips is the Chairman of the ROI Institute and a world-renowned expert on accountability, measurement, and evaluation. Phillips provides consulting services for Fortune 500 companies and major global organizations. The author or editor of more than 75 books, he conducts workshops and presents at conferences throughout the world. Phillips has received several awards for his books and work.

The Society for Human Resource Management presented him an award for one of his books and honored a Phillips ROI study with its highest award for creativity. The American Society for Training and Development gave him its highest award, Distinguished Contribution to Workplace Learning and Development for his work on ROI. His work has been featured in the Wall Street Journal, BusinessWeek, and Fortune magazine. He has been interviewed by several television programs, including CNN.

His expertise in measurement and evaluation is based on more than 27 years of corporate experience in the aerospace, textile, metals, construction materials, and banking

industries. Dr. Phillips has served as training and development manager at two Fortune 500 firms, as senior human resource officer at two firms, as president of a regional bank, and as management professor at a major state university.

Dr. Phillips regularly consults with clients in manufacturing, service, and government organizations in over 60 countries in North and South America, Europe, Middle East, Africa, Australia, and Asia.

Dr. Phillips has undergraduate degrees in electrical engineering, physics, and mathematics; a master's degree in Decision Sciences from Georgia State University; and a Ph.D. in Human Resource Management from the University of Alabama. He has served on the boards of several private businesses—including two NASDAQ companies—and several nonprofits and associations, including the American Society for Training and Development, the National Management Association, and the International Society for Performance Improvement, where he served as president.

## Five-Day Workshop Outline

### DAY 1

- Introduction and Readiness to Learn Expectations
- The Business Case for ROI
- Overview of the ROI Process
- Developing Objectives
- Case Application
- Assignments

### DAY 3

- Guiding Principles
- Isolating the Effects of Programs
- Team Presentations to Executives (Simulated)

### DAY 5

- Communication of Results
- Implementation of the ROI Methodology
- Individual Project Planning
- Individual Project Plan Presentations
- Next Steps – Follow up

### DAY 2

- Business Alignment
- Objectives at Higher Levels
- Data Collection Plan
- Collecting Data
- Sampling for Data Collection
- Case Application
- Prepare for Presentations

### DAY 4

- Converting Data to Money
- Costs/ROI
- Intangible Benefits
- Case Application
- Forecasting ROI
- Individual project planning