

# Certification by Centre for Performance and ROI™ Certification Model & Criteria

## *Requirements for Certification*



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## Introduction

When submitting performance results and ROI to clients, sponsors and C-Suite executives, the most important issue is credibility. Stone's Measurement and ROI process is used world-wide and is the most credible measurement and ROI process in use today. This Certification model and criteria includes all of the components to cross-check that credibility and ensure that it meets the latest professional standards. This protects the integrity of the process and it ensures that the user (those being certified) completes a study that has the best opportunity to meet the needs of the critical eye of stakeholders. It is strongly suggested that this certification model be used as a quality check for all future studies employed by users, even after they are certified.

## Certification Requirements

This document is the controlling document for the criteria for Measurement and ROI Certification. The following five activities must be completed successfully (to standard) in order to become Measurement and ROI Certified:

1. Successfully complete Stone's *Measurement and ROI Certification* intensive three-day workshop.
2. Work in partnership with your team during the workshop - using the ROI Learning Map as a job aid - deliver a stand-up team presentation which focuses on the application of designated components of Stone's Measurement and ROI process. *Criteria for the presentation will be provided during the workshop.*
3. Given a series of ROI case scenarios which include disguised methodology errors, successfully apply the ROI Quality Analysis to reveal 80% of the errors and then determine the quality of the ROI in each case scenario.
4. Successfully complete an objective end-of-course ROI quiz by scoring at least 80%.
5. Successfully complete a pre-approved follow-up ROI evaluation project (business outcome study including ROI calculation) which meets the criteria listed in this document under the heading "ROI Certification Business Outcome Study Criteria". *During your follow-up study activities, you will have access to Ron Drew Stone, the ROI Quality expert, as your virtual personal coach.*

## Criteria for ROI Certification Business Outcome Study

Prior to the certification workshop, participants will select a suitable project for an ROI evaluation study. If necessary, you may select a different evaluation project during the workshop after consultation with the facilitator. The ROI evaluation project allows certification candidates to demonstrate through execution that they can successfully complete a study that

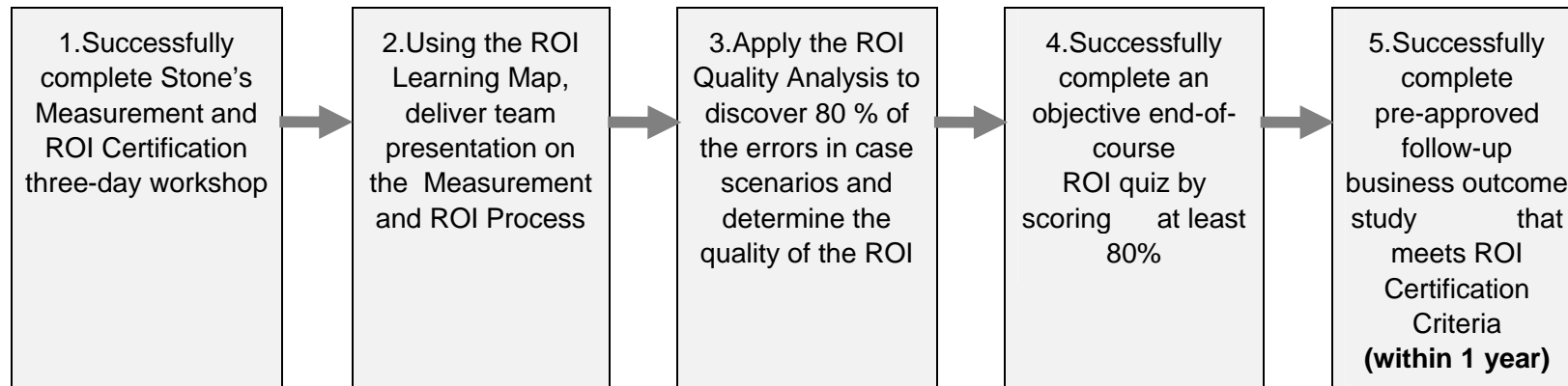
meets designated criteria. The candidate's certification will be based on the extent to which the ROI Certification Project Success Criteria is met.

## Personal Coach for Certification

Your personal coach is Ron Drew Stone. He will coach you virtually through email and conference calls as required to guide you through to a successful business outcome study and certification in the Measurement and ROI process. It is your responsibility to complete all of your work and required actions diligently and thoroughly. Your coach will not complete your study for you, he will only present thought provoking issues and questions and guide your decisions as you design your tools and complete your study. The decisions are yours to make. **Note: Personal coaching continues for up to one year after the workshop, or until the certification study is finished, whichever occurs first.**

The primary criteria used to evaluate the quality and acceptance of your business outcome study is Stone's Measurement and ROI Process which is addressed in the certification workshop and in your workbook. Figure A below provides a graphic of the required certification activities.

**Figure A. Graphic of Required Certification Activities**



## Appendix A. Evaluation Strategy Worksheet

You have selected one of your programs or projects to evaluate for business outcome and ROI.

Review the evaluation framework below and then answer the 17 questions on this worksheet on the following pages. *After you email the completed worksheet to your coach he can consult with you to refine your answers as necessary.* Reflect on the objectives of the program and your stakeholders' needs as you complete the worksheet.

### Stone's Evaluation Framework (review this framework)

Follow-up Performance Evaluation	
<b>Business Outcome*</b>	Verifies changes in targeted business outcome measures from the organization's records or other credible sources. ( <i>What business measures improved? i.e., Quality, work output, sales, customer service, customer satisfaction, employee turnover, etc</i> )
<b>Execution in the Work Setting</b>	Evaluates the successes and disappointments of the performance solution to verify execution of key targeted objectives, tasks, and behavior in the work setting. Includes evaluation of Active Management Reinforcement (AMR) and corrective action to eliminate ineffective habits. ( <i>How did people apply behavior / skills in the work setting?</i> )
Performance Readiness Evaluation	
<b>Performance Readiness</b>	Measures participant readiness to execute targeted objectives and tasks in the work setting (awareness, <u>knowledge, skills</u> , behavior, confidence, habits, management reinforcement, and other readiness factors identified in the solution design).
<b>Initial Reaction</b>	Measures initial reaction and satisfaction with delivery of the training and performance solution
* After the performance solution's influence on the business outcome is determined, the resulting improvement data may be assigned a monetary value to calculate the return on investment. The net benefit is compared to the fully loaded cost of the performance solution to determine the ROI.	

## **Appendix B. Twelve Guiding Principles of Stone's Measurement and ROI Process**

### **Twelve Guiding Principles**

1. Partner up-front with sponsor and reach agreement on the purpose, benefits, scope, resources and support required for the measurement project.
2. When collecting data, apply the five Cs and collect sufficient data to establish linkage between performance readiness, execution, and business outcome.
3. Conduct success and disappointment analyses and report both types of data.
4. Choose the most conservative alternative when analyzing data and reporting results.
5. When sources estimate results, make an adjustment for the potential error of the estimate.
6. Identify the key factors that influence business outcome measures and apply the appropriate method to adjust for causal influence.
7. Determine sustainable impact of improvements and make adjustments accordingly.
8. Calculate ROI only when it satisfies the purpose of the evaluation project and has utility for one or more interested stakeholders.
9. When comparing solution costs to net benefits to calculate ROI, use fully-loaded costs.
10. When available, use organization records as a first source to report outcome improvement data and to determine monetary values, then resort to other available sources.
11. Always accompany ROI calculations with a ROI Quality Analysis.
12. When reporting tangible and intangible results, communicate linkage and contribution to the organization's key business strategies or measures.



**Certification by Centre for Performance and ROI™**

**Certification Workshop**

Certification Workshop – Three-days plus follow-up personal coaching

**Your eminent workshop leader**

**Ron Drew Stone**

**President, Center for Performance and ROI**

Author, international consultant & presenter, and one of the world's most recognized and accomplished authorities on improving performance and measuring performance solutions. He developed his Measurement and ROI Process™ and his Performance Alignment and Linkage Process™ to address client needs and to align training with the business. He is an expert in needs analysis, aligning training for business results, and ROI.

**Training today is costly - and the results too far reaching—to be left o chance**

This workshop provides real-world proven tools, worksheets, and processes to help you link your training to the business and measure results. You will take a dramatic leap forward in demonstrating the contribution of your training programs, and achieve a new level of accountability. Walk away from this workshop with tools that get results and gain management cooperation, support and respect.

**Learn International best practices**

- Design training programs to achieve results and return on investment
- Apply a proven, systematic and credible methodology to determine the value of training
- Apply standards to analyze data, determine causal influences and sustained impact and communicate tangible and intangible results
- Link training and intangibles to business outcomes

**Accelerated learning - engaging, effective, fun**

You are led by an expert as you learn and apply ROI concepts to one of your programs. Ron employs the accelerated learning approach to facilitate effective learning during his workshops.

**Gain skills to be fully certified**

- Determine the timing of data collection and select proper data collection instruments
- Select appropriate measurement strategies
- Calculate or estimate the value of an improvement
- Analyze data and calculate the actual ROI
- Apply the ROI Quality Analysis tool to determine the quality of ROI

**Certification benefits**

- Follow-up personal coaching to complete the implementation of your own business impact study
- Demonstrated competency in conducting measurement activities and business impact studies
- A Certificate of Accomplishment upon successful completion the workshop and your own business impact study
- Skills that will make you more credible and valuable to your organization

**Who should attend**

Anyone who directs training or is responsible for managing projects and addressing the impact of projects or learning and change interventions—directors; designers; research & measurement practitioners; project managers; performance consultants; quality specialists; organization development practitioners; HR specialists; account executives; leadership and talent development specialists; course designers and facilitators; information technology professionals.

**Sample of Ron's clients**

A sample of private sector, multi-national and educational sector clients include: Coca-Cola; Bristol-Myers Squibb; Harley-Davidson; Bloomberg; AT&T; Genentech; Time-Warner Telecom; British Telecom; Enterprise Ireland; American Express; Bank of America; Federal Express; Lockheed; Delta Airlines; Apple; Boeing; Amazon.com; SaskTel Canada; Honda; GlaxcoSmithKline; Shell Oil; Toyota; Safeway; State University of New York; Lansing Community College; Drake University; Siemens Ltd.- China; FranklinCovey South Asia; Astrazeneca Ltd.- China; Baxter Healthcare Asia Pacific; and CAL Bank, Accra, Ghana.



## Certification by Centre for Performance and ROI™

### Certification Workshop

#### The Learning Process

- Participants complete several pre-work items prior to the workshop.
- *ROI Learning Map*. Teams use the ROI Learning Map to deliver a stand-up team presentation.
- *Case Studies and Scenarios*. Teams work to solve exercises, scenarios and case applications. These activities facilitate involvement, collaborative problem solving, and deeper thinking to discover and resolve issues and build confidence to execute.
- *ROI Quality Analysis tool*. Teams apply the ROI Quality Analysis tool to determine the credibility and quality of the ROI in case scenarios.
- *ROI Measurement Project*. Each participant is required to identify a program to evaluate. During the workshop, a data collection strategy and plan is developed. It will also be used to complete certification requirements, as participants must complete a follow-up business impact study.
- *Follow-up Personal Coaching*. The learning process continues following the workshop as individuals receive virtual coaching through email and conference calls to complete their ROI measurement project.

#### Workshop Materials and Job Aids

*Each participant receives:*

- A detailed participant workbook, complete with exercises, tools, and exhibits
- Color foldout ROI job aid
- Miscellaneous handouts and templates
- Text book and case book optional at added cost

#### The Center for Performance and ROI

*Once a client, always a client.* That is our creed. Once certified, you can always contact the Center with questions, issues, an opinion about your project, or whatever is on your mind. We have the most credible measurement and ROI process in the world and we want you to practice it well and promote it to others. You will be a sanctioned practitioner of measurement and ROI and you are entitled to use this process inside your organization.

#### Testimonials

"I've attended many courses before, but you are the one who makes me think more." *HR Manager, Learning & Development, Evonik Degussa (China) Co., Ltd*

"Regarding this training topic, it was not the first time we learnt the concept of Training ROI. While comparing with our former experiences, Ron's workshop was much easier to practice." *Training Officer, Engineering, Emerson Climate Technologies Research and Development*

"I have been a great fan of yours. The kind of energy, interest, and passion you bring with your facilitation is very praise-worthy. Salute to you. In India, we really pay huge respects to teachers and I am indebted to you." *Ramon, Economist from TCS*

"This course will help me move our e-learning evaluation to levels 4 & 5. Thank you Ron. Great job." *Training Manager, Cable Company, USA*

"Thank you Ron for helping me to learn to work with intangibles and justify my numbers. I am sold on ROI." *Manager, Training & Dev, MTA Long Island Bus*


"Ron...your workshop is the best I've attended in 30 years... ..invaluable and you did a grand job!" *Joe S., Corp Training/Intrado University*

#### About your workshop leader

**Ron Drew Stone** is an author, international consultant & presenter, and one of the world's most recognized and accomplished authorities on improving performance and measuring results. He is President of his own consulting company. He provides consulting services in linking training to organization business measures, designing training for results and ROI, conducting needs assessments, and measuring program results. Ron certifies practitioners in his measurement and ROI process and conducts public and in-house performance improvement, assessment, and measurement workshops.

Ron has helped clients on five continents implement measurement and ROI and needs analysis. He has conducted over 100 ROI studies and directed hundreds more. He developed the Situational Needs Assessment Process™, the Performance Alignment and Linkage Process™, and his Measurement and ROI Process™. Ron has over 25 years of diverse experience in economic development, engineering, training, and the human resource function.

Ron served as chair of the Edison Electric Institute's Executive Leadership Program for senior officers in the electric utility industry. He has also designed executive programs for The University of Georgia and Auburn University. He has a BBA from Georgia State University. He is a certified change consultant and a certified ROI professional (CRP).

	<b>Certification by Centre for Performance and ROI™</b> <b>Certification Workshop</b>
<p><b>AGENDA: DAY ONE</b>  <b>Intro and ROI overview</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Build the ROI model from 30,000 feet</li> <li>• Brief <i>Discussion</i> - Pre-work</li> </ul> <p><b>Evaluation framework</b></p> <ul style="list-style-type: none"> <li>• Identify four components of the framework</li> <li>• <i>Activity:</i> When and how to use the four components to evaluate programs and projects</li> </ul> <p><b>Understanding each component of the ROI model</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Mountain Media Case Study</li> <li>• <i>Activity:</i> Teams identify and discuss the issues and methods of their selected ROI process components</li> </ul> <p><b>ROI enabling skills</b></p> <ul style="list-style-type: none"> <li>• Case scenario: Hard and soft data</li> <li>• <i>Activity:</i> Discuss how your training links to the business</li> <li>• Teams brief to class</li> <li>• <i>Activity:</i> Exercise – develop objectives and measures</li> <li>• Teams brief results to class</li> </ul> <p><b>Data collection</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Teams identify and discuss the pro's and con's of their selected data collection component</li> <li>• <i>Activity:</i> Teams identify why, how and when to collect baseline and follow-up data</li> <li>• Review sample follow-up performance questionnaire</li> <li>• <i>Activity:</i> Develop key follow-up questions</li> <li>• Case Scenario: Analyze data and calculate ROI using an Action Planning process</li> </ul> <p><b>Deciding on a data collection strategy</b></p> <ul style="list-style-type: none"> <li>• Case scenario: Data collection strategy</li> <li>• <i>Activity:</i> Begin development of Evaluation Strategy and Plan</li> </ul> <p><b>AGENDA: DAY TWO</b>  <b>Adjusting results for causal influences</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Identify methods to determine causal influence and discuss reasoning of each approach</li> <li>• Case scenarios: Comparison Groups; Conditional Trend Analysis; Source Estimates</li> <li>• <i>Activity:</i> Utilize job-aid to make causal influence decision</li> <li>• Revisit and reinforcement</li> </ul>	<p><b>Adjusting results for sustained impact</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Identify/discuss how to determine sustained impact</li> <li>• Case scenarios: One-time Impact; Recurring Impact; Turnover Loss Adjustment</li> <li>• Revisit and reinforcement</li> </ul> <p><b>Assigning monetary values to data</b></p> <ul style="list-style-type: none"> <li>• Identify alternative approaches; Known Values; Value by Association; Source Estimates</li> <li>• Case scenario: Assigning monetary values</li> </ul> <p><b>Identifying costs of the solution</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Identify fully loaded costs</li> <li>• <i>Activity:</i> Direct costs and pro-rated costs</li> </ul> <p><b>Analyzing Tangible and intangible results</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Calculating the required benefits</li> <li>• <i>Activity:</i> ROI Quality Analysis tool. Teams apply the tool to determine credibility and quality of the ROI in case scenarios.</li> </ul> <p><b>Reporting to stakeholders</b></p> <ul style="list-style-type: none"> <li>• <i>Communicating results</i></li> <li>• <i>Activity:</i> Quality of ROI—Conclusions and credibility</li> </ul> <p><b>AGENDA: DAY THREE</b>  <b>Forecasting ROI</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Using template, teams practice forecasting ROI.</li> <li>• Discuss the benefits of forecasting and how it can be used with various stakeholders</li> </ul> <p><b>ROI measurement project</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Complete Evaluation Strategy and Plan on ROI measurement project</li> <li>• <i>Activity:</i> Individuals brief the strategy and plan to class and engage in feedback and critique</li> </ul> <p><b>Address barriers and ineffective habits</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Teams discuss and identify organization barriers to executing their project plan</li> <li>• <i>Activity:</i> Individuals identify their personal ineffective habits that are barriers to executing their project plan</li> <li>• <i>Activity:</i> Develop and present action plan to eliminate barriers and ineffective habits</li> </ul> <p><b>Team presentations – Learning map</b></p> <ul style="list-style-type: none"> <li>• <i>Activity:</i> Teams finalize their learning map presentation.</li> <li>• <i>Activity:</i> Teams present stand-up presentation to class.</li> </ul> <p><b>Celebrate the ROI learning and certification experience</b></p> <ul style="list-style-type: none"> <li>• Teams decide how to celebrate and proceed to implement Adjourn</li> </ul>