

# The ROI Dilemma

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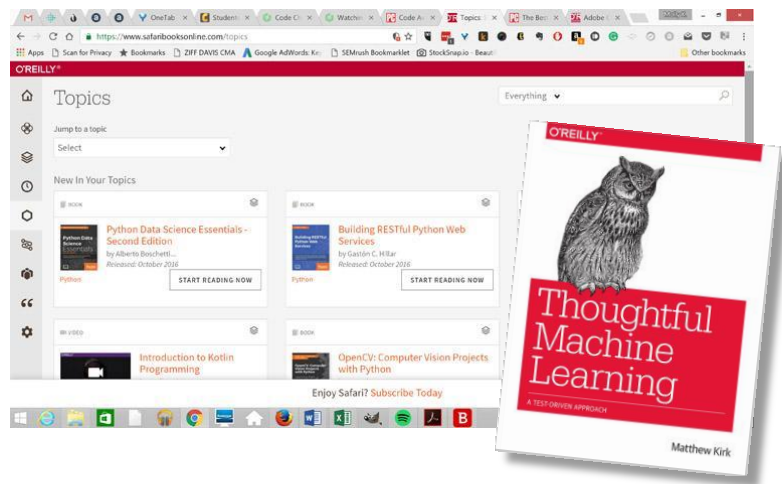
# Introduction

## O'Reilly

- Providing learning for almost 40 years
- Founder / CEO Tim O'Reilly
- Trends called – Web 2.0, Maker Movement, Open Source, Data is the Intel inside
- 500+ employees
- 5,000+ enterprise clients, 2.3m platform users globally
- Offices in US, Canada, UK, Japan, China
- 17 global technology events serving 20k individuals and 1,000 sponsor companies

## Karen Hebert-Maccaro, CCO

- Chief Content Officer
- Former Chief Learning Officer
- Former professor/dean



The background of the image is a close-up, slightly blurred view of several US dollar bills. The focus is on the texture and details of the currency, including the green and blue ink, the serial numbers, and the intricate patterns of the bills. The lighting is soft, creating a sense of depth and highlighting the physical nature of the money.

96.3 Billion



**Investments generate returns or they aren't investments for long.**

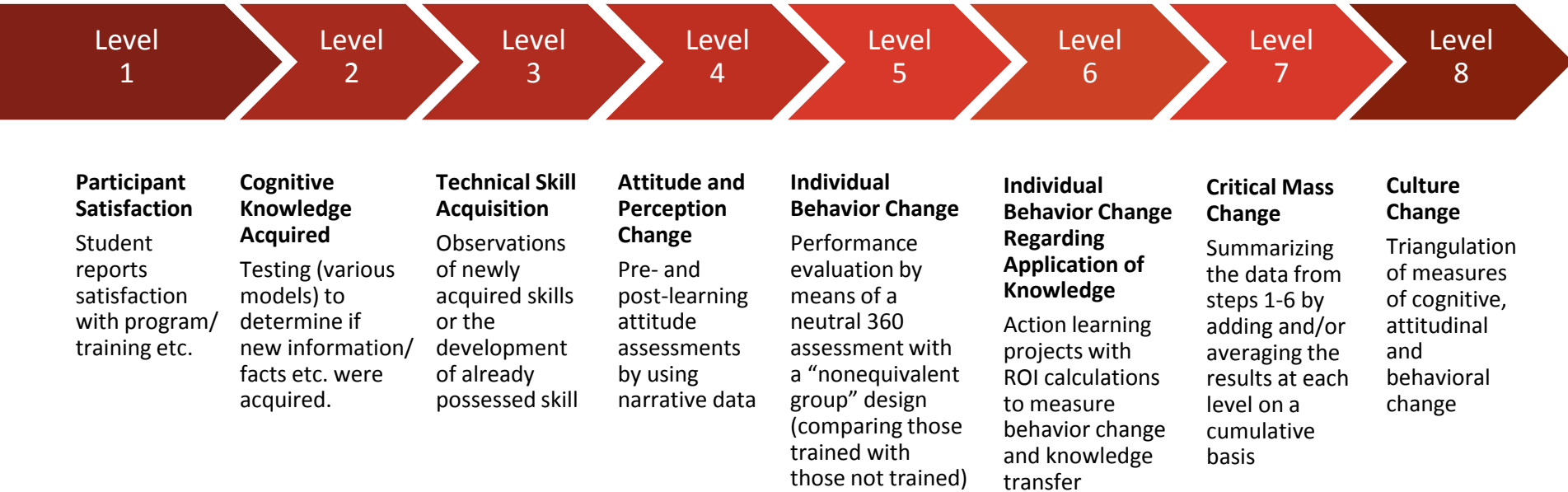
**Our stakeholders want results, and so do we!**



Demonstrating ROI is easier  
in some parts of the business  
than in others, and **L&D is among  
the most challenging.**

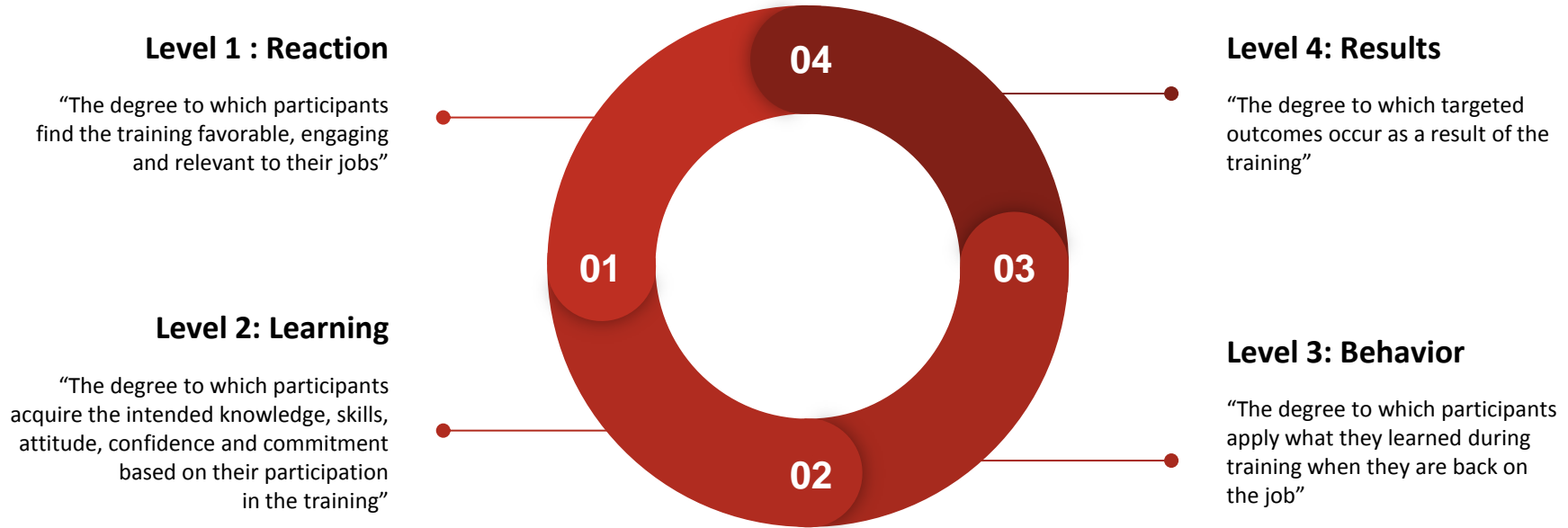
# ROI: A Review of the Thinking & Tools of Yesterday (and today)

# Allen's Model



Credit: Allen, M. (2002) The corporate university handbook; designing managing and growing a successful program. New York: AMACOM

# The Kirkpatrick Model





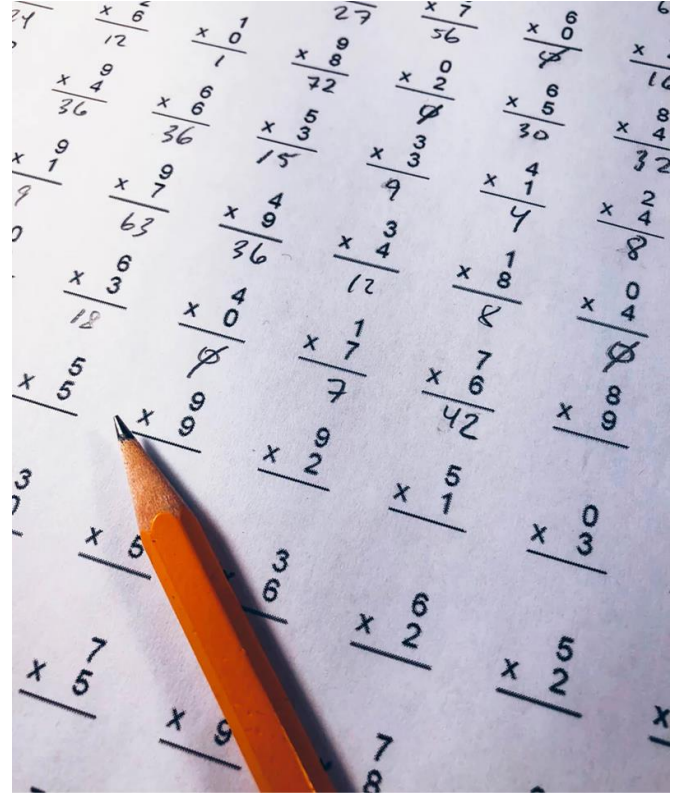
# “Smile Sheets”

Did you like it?



# Tests

Do you know  
it “now”?



# Observation

Can someone  
else “see” it?



# Impact

Did it help?



Oh yeah... and one more  
thing: Completion Data

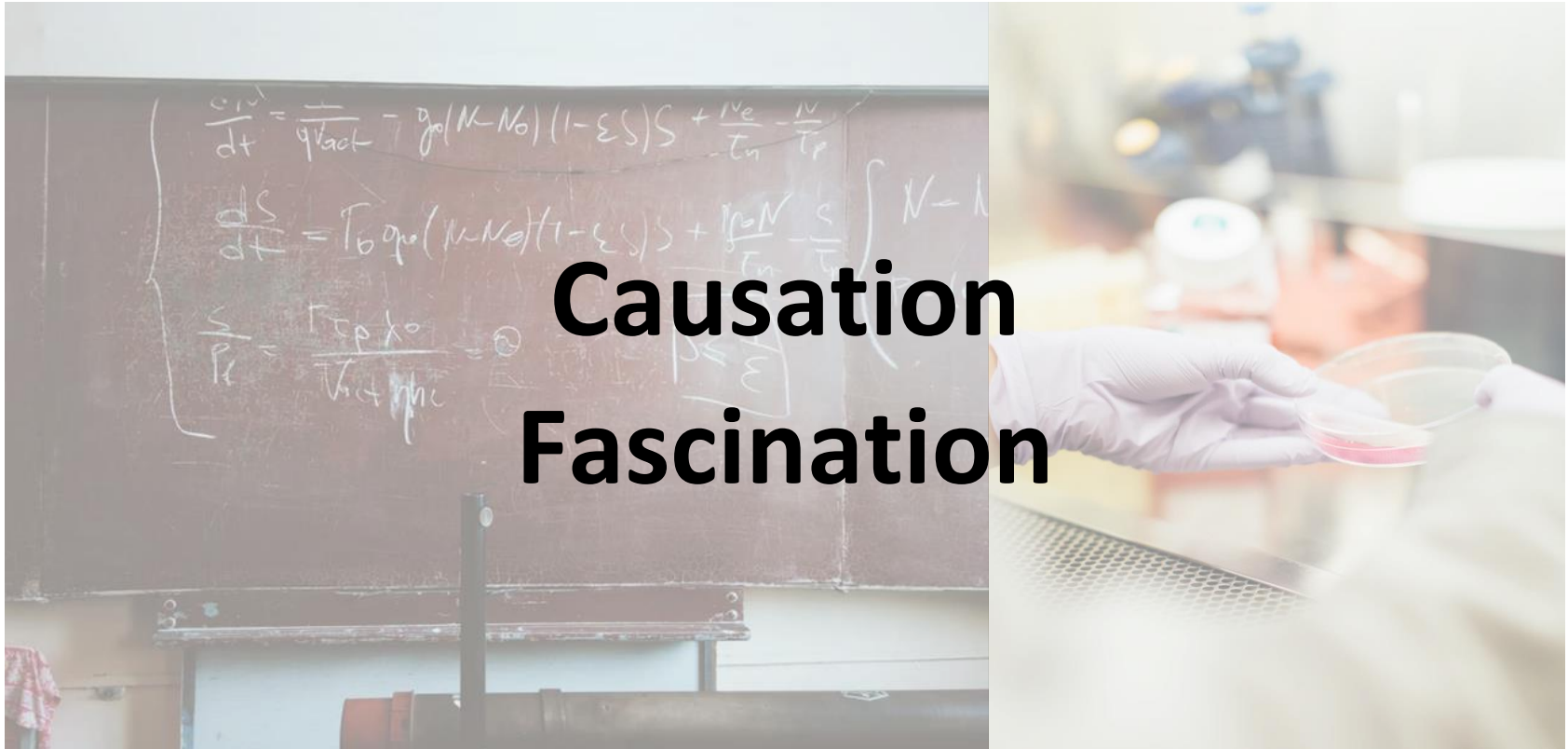
Did you finish?

Completion measures one thing and one  
thing only: compliance.

**Learning is about impact.**

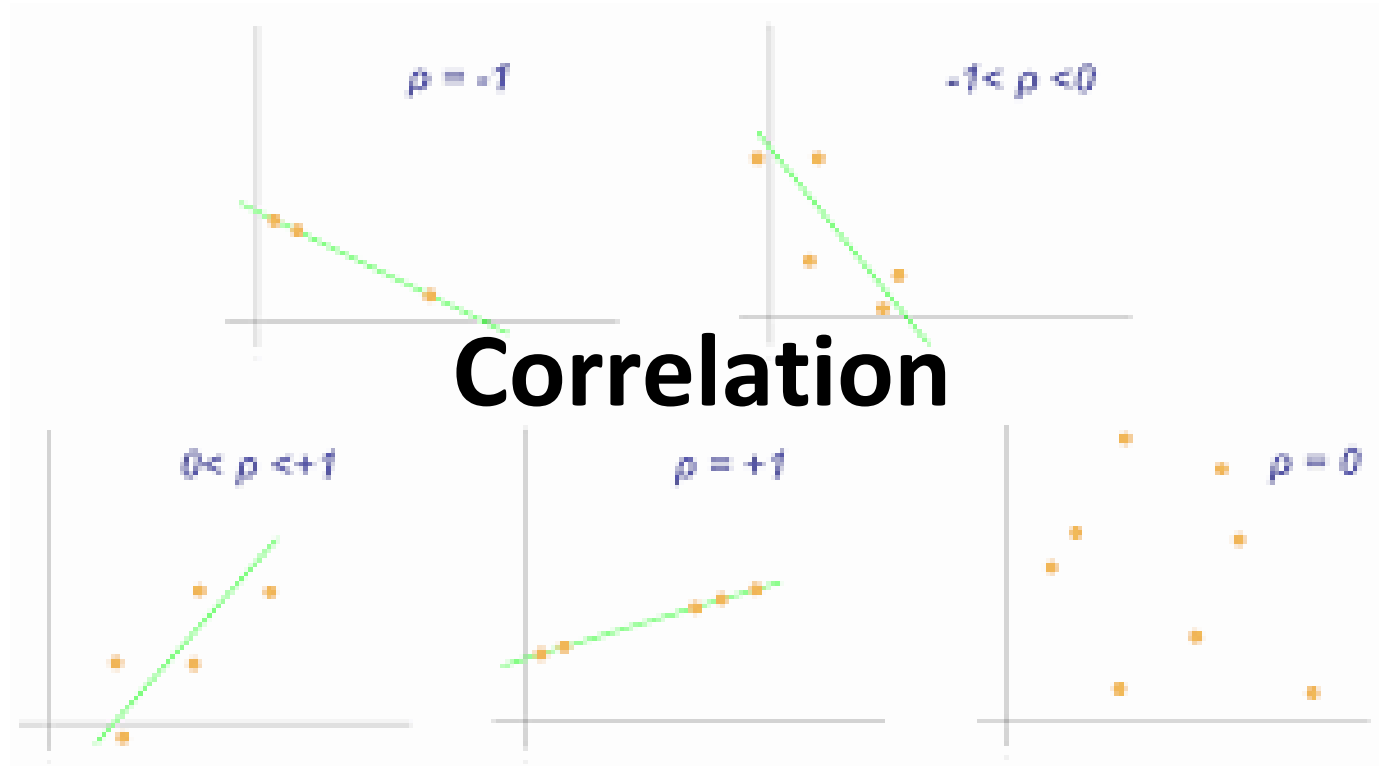


# A Core Challenge?



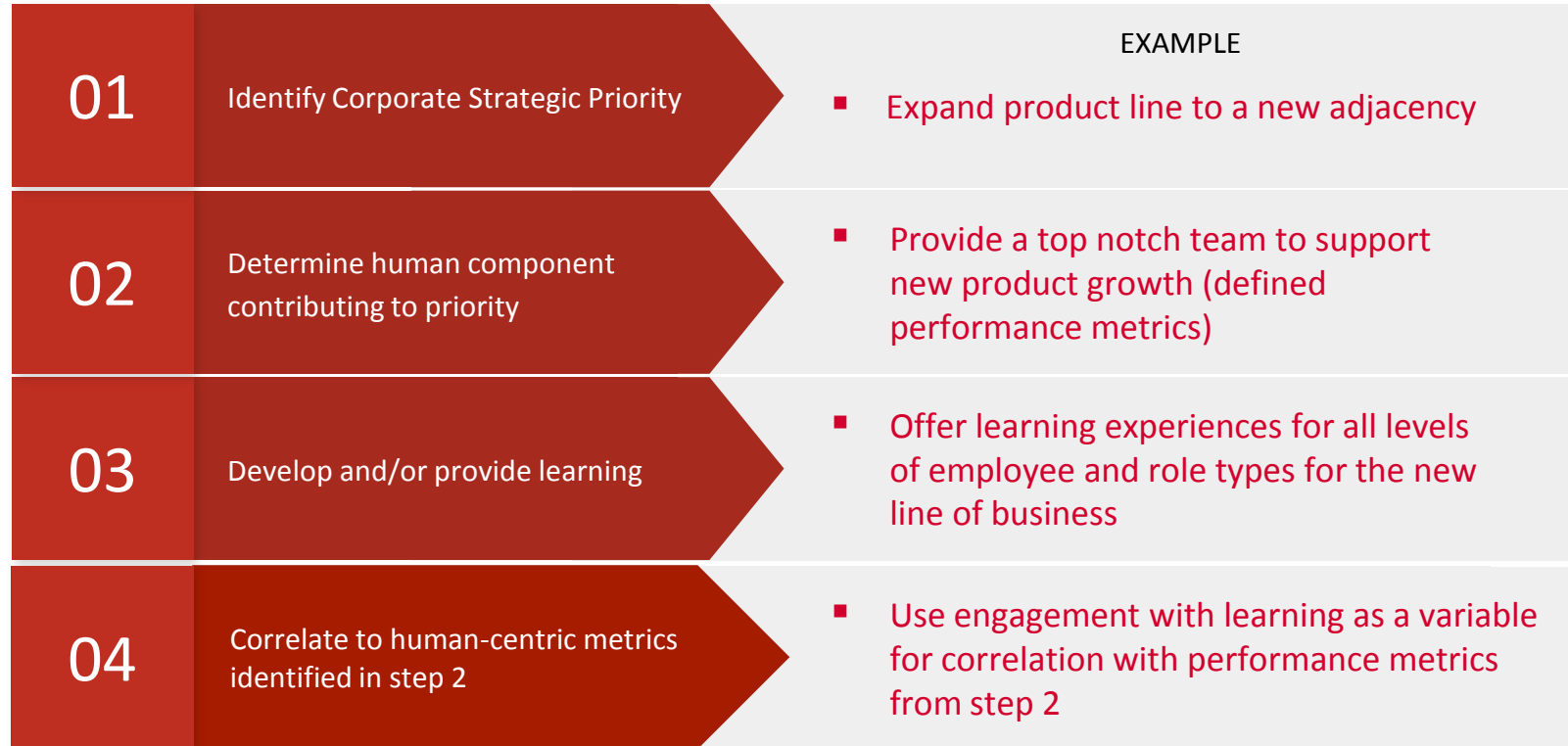
# A New Way Forward for ROI

# One Solution?





# A Correlation-Based Learning Metric Framework



# Correlation Metric Options are Many

- High performer identifications
- High potential identifications
- Employee engagement scores
- Time to ramp calculations
- Bonus %
- Promotions

They take advantage of data and metrics that are already established and valued.

# Is Correlation the Silver Bullet of Learning ROI?

**No. There is no one way.**

The background image shows two 'ONE WAY' street signs mounted on a pole. The top sign is tilted and points to the right, while the bottom sign is straight and points to the left. Both signs are white with black text and a black border, and they include 'DEPT. OF TRANSPORTATION' at the bottom. The background is a blurred city street with tall buildings.

# Multi-Faceted Learning Measurement Model

Purpose	ROI connected to business priorities	Learning efficacy and impact on business	“Disaster detection” and mid-course correction indicator
Assessment type	<b>CORRELATE</b> Correlational analysis to connect learning engagement with already existing and valued human capital metrics	<b>EXPLORE</b> Targeted Behavior (Level 3) and Impact (Level 4) assessment strategy (consider manager feedback, the Success Case Method and observational analyses)	<b>MONITOR</b> Routine Satisfaction (Level 1) and Knowledge Testing (Level 2) assessment and “learner behavior” monitoring as part of a comprehensive L&D business unit dashboard
Underlying justification (evergreen)	<b>The Learning Imperative:</b> Learning is the “Next Economy” superpower and data re: talent attraction, retention and workforce upskilling and reskilling support a core “table stakes” argument		

# We covered Correlation.

## Now let's talk EXPLORE (Behavior & Impact)

- Targeted (to overcome the issues of scale and over assessment)
- Strategic alignment — high investment
- Strategies such as: manager assessment at T2, Success Case Method and in-depth observational research



# MONITOR: Satisfaction & Knowledge Testing

- Smile sheets — consider limiting questions
  - Instructor effectiveness
  - Will you use what you learned in the next 30 days
  - What specifically will you use?
  - What was missing?
- Pre/Post test model works best (and yet is still limited)



# The Power of Learner Behavior Metrics

- Linear vs. Non-linear
  - Performance adjacent
- Deepening vs. Broadening
- Topical analyses and trends
- Industry comparison data

# The Learning Imperative: An Underlying Truth



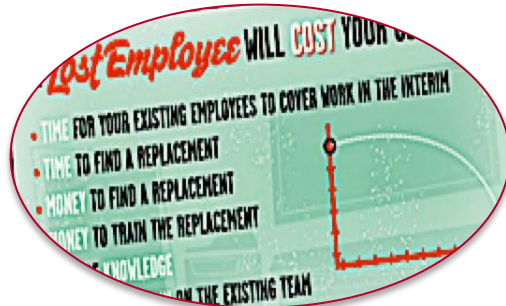
# The Learning Imperative



Great talent is **hard to find**



**Lifelong learning** is necessary



Turnover is **costly**



**Millennials value development**  
over perks/compensation

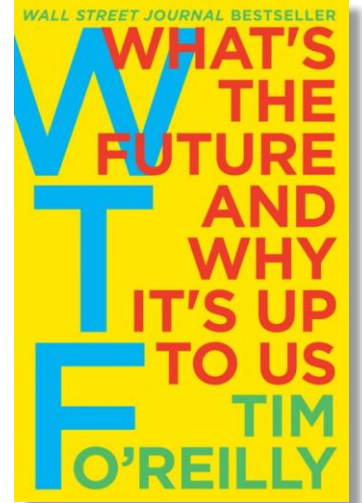
# An imperative of the times...

## Once

- Jobs for life
- Industries stable
- Technological growth slower
- Skilled up once

## Now & tomorrow

- Multiple *careers* in a lifetime
- Rapid technological change (including AI)
- Upskilling and reskilling continuously



Learning is the “next  
economy” superpower—  
are you ready?

# Questions? Thoughts?

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