



## Measuring Return on Investment, Volume 3 (In Action)

By Jack J. Phillips, Patricia Pulliam Phillips

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Since the publication of *Measuring Return on Investment, Volume 1* the interest in measuring the return on investment (ROI) in training and performance improvement continues to grow. *Volume 1* filled an important void in the training literature. Published in 1994, it remains one of ASTD's all-time bestsellers. *Volume 2*, published in 1997, demonstrated further progress with measuring the return on investment in a variety of programs.

*Measuring Return on Investment, Volume 3* presents a variety of approaches to evaluating training and performance improvement programs in HRD. Most of the cases focus on evaluation at the ultimate level-ROI. Collectively, the cases offer a wide range of settings, methods, techniques, strategies, and approaches. Although most of the programs focus on training and development, others include organization development and performance management. As a group, these cases represent a rich source of information about the strategies of some of the best practitioners, consultants, and researchers in the field.

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### Editorial Review

#### About the Author

Patricia Pulliam Phillips is Chairman & CEO of The Chelsea Group, a research and consulting company focused on accountability issues in training, HR, and performance improvement. Patricia conducts research on accountability issues and works with clients to build accountability systems and processes in their organizations. She has helped organizations implement the ROI process, developed by Jack J. Phillips, in countries around the world including South Africa, Singapore, Japan, New Zealand, Australia, Italy, Turkey, France, Germany, Canada, and the US. She has been involved in hundreds of ROI impact studies in a variety of industries.

Patricia has a Master of Arts Degree in Public and Private Management from Birmingham-Southern College. She is certified in ROI evaluation and serves as co-author on the subject in publications including Corporate University Review, The Journal of Lending and Credit Risk Management, Training Journal, and Evaluating Training Programs 2nd Edition, by Donald L. Kirkpatrick, Berrett-Koehler Publishers, Inc. (1998). She is contributing author to HRD Trends Worldwide, by Jack J. Phillips, Gulf Publishing (1999). Patricia has authored several issues of the American Society for Training and Development Infoline Series including Mastering ROI (1998), ROI on a Shoestring (2001), and Planning Evaluation (2001). Patricia is also co-author of The Human Resources Scorecard: Measuring Return on Investment, Butterworth-Heinemann (2001).

**Jack J. Phillips** is a world-renowned expert on measurement and evaluation and developer of the ROI process, a revolutionary process that provides bottom-line figures and accountability for all types of training, performance improvement, human resources, and technology programs.

He is the author or editor of more than 20 books--eight focused on measurement and evaluation--and more than 100 articles.

His expertise in measurement and evaluation is based on more than 27 years of corporate experience in five industries (aerospace, textiles, metals, construction materials, and banking). Phillips has served as training and development manager at two Fortune 500 firms, senior HR officer at two firms, president of a regional federal savings bank, and management professor at a major state university.

In 1992, Phillips founded Performance Resources Organization (PRO), an international consulting firm that provides comprehensive assessment, measurement, and evaluation services for organizations. In 1999, the Franklin Covey Company purchased PRO, and it is now known as the Jack Phillips Center for Research. Today it is an independent, leading provider of measurement and evaluation services to the global business community. Phillips consults with clients in manufacturing, service, and government organizations in the United States, Canada, Sweden, England, Belgium, Germany, Italy, Holland, South Africa, Mexico, Venezuela, Malaysia, Indonesia, Hong Kong, Australia, New Zealand, and Singapore. He leads the Phillips Center in research and publishing efforts that support the knowledge and development of assessment, measurement, and evaluation.

Phillips's most recent books include The Human Resources Scorecard: Measuring the Return on Investment (Houston: Gulf Publishing, 2001); The Consultant's Scorecard, (New York: McGraw-Hill, 2000); HRD Trends Worldwide: Shared Solutions to Compete in a Global Economy, (Houston: Gulf Publishing, 1999);

Return on Investment in Training and Performance Improvement Programs, (Houston: Gulf Publishing, 1997); Handbook of Training Evaluation and Measurement Methods, (3d edition, Houston: Gulf Publishing, 1997); and Accountability in Human Resource Management, (Houston, Gulf Publishing, 1996).

Phillips has undergraduate degrees in electrical engineering, phys

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