




Return On Talent Investment™

IDENTIFY METRICS TO DEFINE YOUR L&D FOCUS

Return On Talent Investment (ROTI™) Scorecard

Follow the directions to complete the ROTI scorecard. The results will provide a snapshot of the types of metrics the company values most (Financials, Processes, People, or Strategy). Definitions for each term is included at the back of the workbook.

-  Check the top 7 items your company pays the most attention to.
-  Circle those items you feel the company is not paying attention to.
Circle as many as you think are appropriate.
-  Star the top 2 things that if your company focused on would make a big difference.

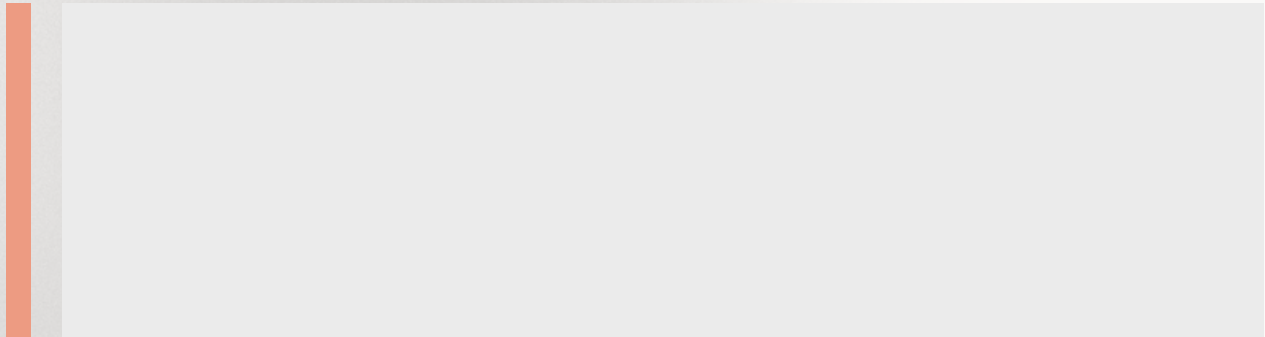
___ Efficiency
___ Financials
___ Technology
___ Past Trends and Benchmarks
___ Performance
___ Measurement
___ Goals and Objectives
___ Regulations
___ Safety and Risk Management
___ Quality
___ Controls
___ Timing and Execution
___ Critical Resources
___ Policies and Procedures

___ Innovations and Ideas
___ Environment and Competition
___ New Markets and Products
___ Future Trends
___ Global and National
___ Vision and Purpose
___ Long - term Strategy
___ Training & People Development
___ Community Relations
___ Customer Focus and Relationships
___ Communication
___ Culture and Values
___ Internal Relationships
___ Recognition

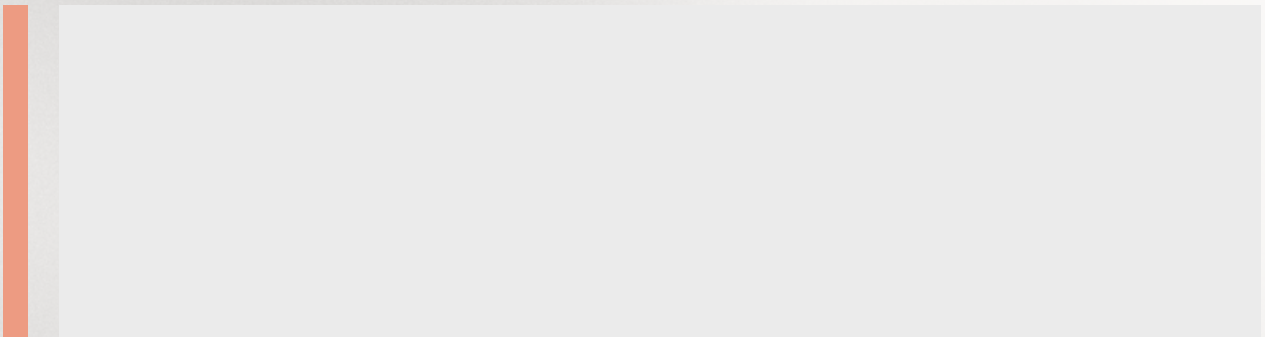
ROTI™ Scorecard Reflections

Use the space below to capture reflections about metrics used by the company.

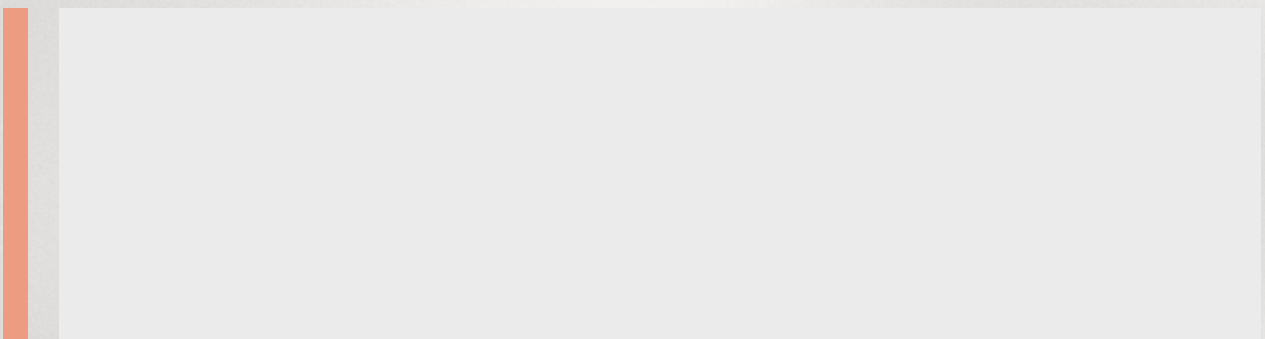
1. *What observations do you have about the scorecard?*



2. *Looking at the 2 "stars", what could this be measured? What kind of data/KPI could be put into place to elevate focus in this area?*



3. *What focus areas could be scaled back to create more of a balanced scorecard?*



ROTI™ Scorecard Reflections

Financials and Traditional Metrics

- Efficiency
- Financials
- Technology
- Past Trends and Benchmarks
- Performance
- Measurement
- Goals and Objectives

Processes

- Regulations
- Safety and Risk Management
- Quality
- Controls
- Timing and Execution
- Critical Resources
- Policies and Procedures

Strategy

- Innovation and Ideas
- Environment and Competition
- New Markets and Products
- Future Trends
- Global and National
- Vision and Purpose
- Long-term Strategy

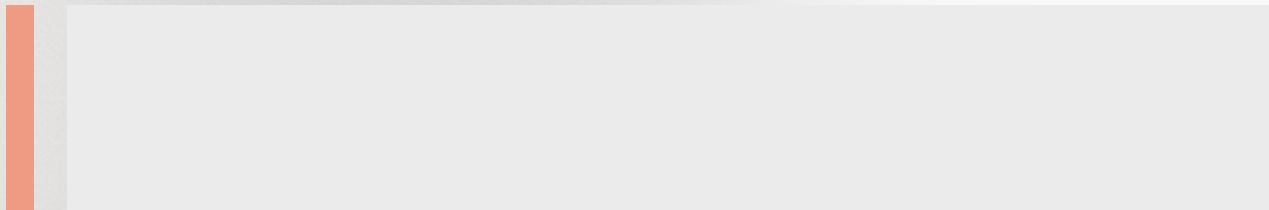
People

- Training and People Development
- Community Relations
- Customer Focus and Relationships
- Communication
- Culture and Values
- Internal Relationships
- Recognition

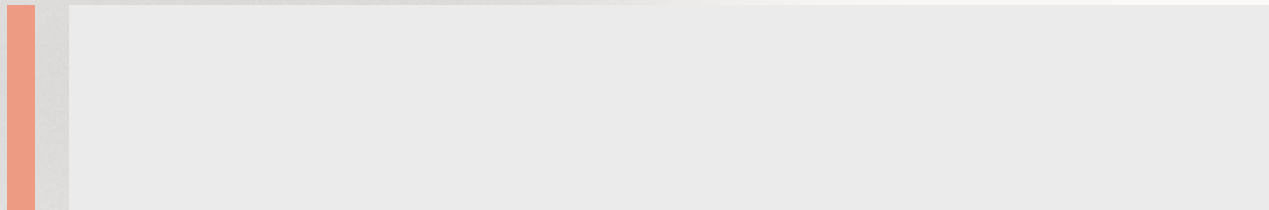
ROTI™ Dashboard

Use the template to document ROTI's for a specific training project.

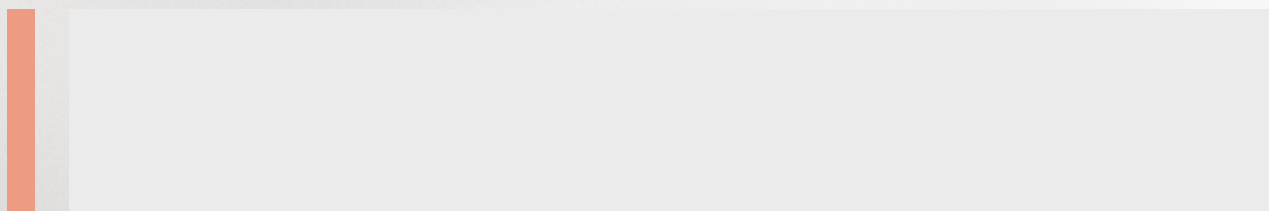
1. *What are 1-3 quantitative Financial or Traditional metrics L&D can use to evaluate training impact?*



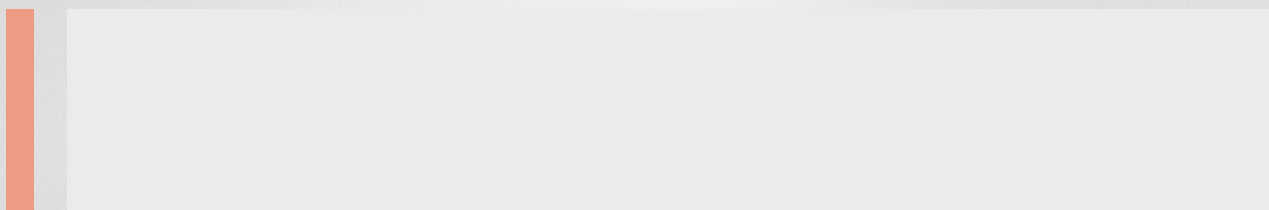
2. *What are 1-3 ways L&D can monitor progress as it relates to our long-term strategy?*



3. *What aspects of the organization's operations/ processes are improving because of L&D efforts?*



4. *Who has L&D engaged (internal/external) to help us achieve goals? How will L&D measure the effectiveness of the training on the people it was meant to support?*



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Scorecard Descriptions

Efficiency	Focus and monitoring on the degree to which operations are done in a time saving or economical manner.
Financials	Analysis, tracking, and decision making based on financial data.
Technology	Investment in and use of technology as an integral part of the organization.
Past Trends and Benchmarks	Use of historical data and/or benchmarks as comparative indicators for planning and analysis.
Performance	Focused measurement of performance in all aspects of the organization.
Measurement	Method of measure is applied, data is captured, tracked and utilized for an improved outcome.
Goal and Objectives	Structured articulation and accountability across the organization.
Regulations and Legal	Constant surveillance of regulatory and legal issues for compliance.
Safety and Risk Management	Significant focus on all issues related to hazards, injury, or risks including loss prevention.
Quality	Culturally driven systems and processes that drive for zero-defect, flawless delivery.

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Scorecard Descriptions

Performance	Focused measurement of performance in all aspects of the organization.
Controls	Emphasis on mechanisms and/or processes to maintain control in all aspects of the organization.
Timing and Execution	Attentiveness to all aspects of the timing, management, and effective implementation.
Critical Resources	Concentration on the management, procurement, and effective use of resources for projects, processes, services, and products.
Policies and Procedures	Clear articulation, documentation and accountability for the compliance of established rules, guidelines, and processes of the organization.
Innovation and Ideas	Consistent encouragement, support, and promotion of new concepts, processes and ideas.
Environment and Competition	Vigilant external awareness of social, political, economic, technological events and activities of others in the industry.
New Markets and Products	Unrelenting investment and drive for opportunities in new markets and the launch of new products and services.
Future Trends	Investment in time and resources to explore and articulate future potential scenarios and trends.
Global and National	Actively focusing, thinking and executing on a large scale at a global or minimum national scope.

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Scorecard Descriptions

Vision and Purpose	Clearly articulated direction that is consistently understood and followed by all.
Long Term Strategy	The translation of a vision into a long term plan that provides direction and frames the future.
Training and People Development	Investment in personnel development in “acts word and deed”.
Community Relations	Contribution to the external community through investment and active participation, including “green” initiatives.
Customer Focus and Relationships	Intentional organizational emphasis and attention to all aspects of the customer relationship.
Communication	Effective, open, and consistent effort to articulate for understanding by all any information that is needed to be known.
Culture and Values	Culture and values are in alignment with what is important to the organization and stakeholders, walk the talk.
Internal Relationships	Valuing contributions across the organization while honoring diversity with consistent and effective teaming.
Recognition	Consistent focus and action by all toward the acknowledgment of positive contribution.

Thank You!

I hope you found this information helpful and it sparked ideas about how your Learning & Development could benefit from a shift in strategic focus.

I'd love to connect with you on LinkedIn or other social media. You'll find the links below. Also, keep an eye out for more resources like this one coming your way soon!

Ginine
GININE CAPOZZI

KnowledgeForceConsulting.com
ginine@knowledgeforceconsulting.com
844-453-6723



www.gininecapozzi.com

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