



MEASURING AND ACHIEVING SUCCESS IN ANY ENDEAVOR

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Why do you do the work you do?

The specific work—the project you are working on now, in fact. How will you demonstrate the value of that project, or the system you are installing, or the new procedure you are implementing? Defining success in clear terms is the first step to demonstrate value of what you do. But as they say, the first step is always the hardest. Too often we try to select one or two measures that, in the end, fail to communicate real value. That is because the measures may represent only one viewpoint or type of data. Here are some categories of measures that reflect different perspectives of value.

HAPPINESS, COMMITMENT, AND MOTIVATION. Reaction from the project team defines success. The perception of a project by team members is a vital measure of success. Are they happy with it? Are they committed to making it work? If answers to these questions are negative, there is a likelihood the project won't get off dead center. And while important, these measures are not enough.

LEARNING AND CAPABILITY. Sometimes the acquisition of knowledge, skills, and credentials, as part of a project, may indicate success. Without a doubt, if you learn new knowledge and develop new skills to make a project work, there is opportunity to contribute additional value to the organization. But these measures of success are not enough. Knowledge is important, but it is only powerful when it is used.

HABITS, BEHAVIORS, AND ACTIONS. Routine and systematic actions are indicators of success. People are on the move; things are happening. So what? Action or behavior change without a purpose is just busywork. The consequence or impact of actions, behaviors, or habits is where real value resides.

IMPACT AND CONSEQUENCES. Here is where the real value of work becomes apparent, particularly from the perspective of sponsors and supporters—those people funding projects. These are the measures in the system and organization records that reflect ultimate outcomes of work. You have likely heard them referred to as key performance indicators (KPIs). Measures of output, quality, and time are KPIs of importance to project funders. These measures are easily converted to money, making value evident or tangible. Other measures such as image, collaboration, and teamwork, are also important. These measures are more difficult to convert to money and represent intangible measures of success. Value may be inherently known, but much less obvious than the improvement in tangible measures. Tangible and intangible indicators of value are great—but they, too, are not always enough for some to describe the real value of your work.

IT WAS WORTH IT. Now, we are getting somewhere. Answering the question, “Is it worth it?” defines ultimate value. It answers the ROI question. Did we get more bang out of the buck than we put into it? How do benefits compare to costs? ROI informs our decisions daily. When we purchase an item, we ask ourselves, Is it worth it? Am I going to get more benefit (tangible or in-tangible) by spending my money this way, than I would by holding on to it or spending it another way? From a financial perspective, if benefits exceed costs, the project or activity is successful.

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Defining success can be difficult if you are only looking through a single lens. Perspective is important. Demonstrating value from multiple perspectives will help prevent other people from undervaluing what you do. Think about your projects. Without you, your team, their time, and financial resources, the project would never get off the ground. Therefore, value commences with the right people at the right time with the right amount of time available and the appropriate financial resources. From there, the project rolls out. To create and demonstrate your projects' real value, measure their success along the five categories in the previous section. Let's call them levels, recognizing the desire to take it to the next level. From the perspective of the funder or sponsor of the project, the next level is more valuable than the previous level. Here are the five levels of success, which define value for your project.

1. REACTION AND PLANNED ACTION | Can you imagine working with a group of people who are uninterested, see no value in the project they are working on, and are uncommitted? The effort to get things moving would be tremendous. Creating value from a project requires that participants view the project as relevant to their situation, important to their success, and necessary to the success of others. Measuring reaction data will show you that the project is useful, helpful, and appropriate—with project participants committing to make the project successful. Perhaps they would even recommend it to others. Reaction data is an important first level of success.

2. LEARNING | People can only perform if they have the necessary information and know how to perform. Learning is the second level of success. But they must first buy in to the project. Learning can lead to buyin. So, there is a connection between this second level of success and the previous. When people know what they need to know to make a project successful, their resistance will more than likely decrease, motivation will increase,

and confidence to do the work will grow. To top it off, they can do the job! In most situations, projects include learning new knowledge and skills. Measuring learning for your project is essential, even if done informally.

3. APPLICATION AND IMPLEMENTATION | But it's not just about knowing; it's also about doing. Applying new skills, testing new concepts, completing tasks, exploring options, and identifying possibilities represent the third level of success—application and implementation. Measures taken here are helpful because they indicate that people are making progress using newly acquired knowledge, skills, and information. Those who are successful deliver greater value than those who are not. Application and implementation measures consider all processes and procedures that are necessary to make a project successful, such as tasks, actions, behaviors, checklists, and policies. The information you garner from this third level of success is powerful. It will tell you what is working, what is not, and what reinforcement and support you and your team need to move progress along.

4. IMPACT | So what if people are applying what they learn? How is it helping you improve output, quality, cost, and time? Sound familiar? This mighty question, or something similar, is the question for which our clients most frequently seek our advice. We make the connection between what people are doing and the consequence of their doing it. This delivers the outcomes we define as impact, the fourth level of success. Impact is the most important level of success from the perspective of sponsors and project funders. Impact measures represent the consequence of application and implementation—they are the strategic and operational KPIs.

This level of success includes improvements in measures such as revenue, new customers, productivity, quality, incidents, waste, retention, and time, to name a few. Indicators of these measures are in organization records and databases. In governments, nongovernmental organizations (NGOs), and nonprofits, impact may include patient outcomes, employment, graduation rates, infant mortality rates, addictions, crime rates, and poverty reduction. In addition to these tangible measures, there are also intangible measures such as customer satisfaction, image, stress, patient satisfaction, teamwork, quality of life, and alliances.

When you demonstrate the value of what you do at Level 4, Impact, you are getting to the heart of the issue that led you to do the work you are doing. Delivering impact relies on success throughout the journey, making measurement at the previous levels even more important. You can only improve the all important KPIs with your project if people see the project as an imperative, know what they need to know, and do what they need to do to make the project successful.

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5. RETURN ON INVESTMENT | Is it worth it? In the end, for many projects, this is the bottom line question. The return on investment in a project is the fifth and ultimate level of success. While there are many measures that tell us the financial efficacy of an investment, the two most common measures (and the most adaptable) are the benefit-cost ratio (BCR) and return on investment (ROI) as a percentage.

First, the benefit-cost ratio (BCR) is the monetary benefits from a project divided by the cost of the project. Benefit-cost analysis has been used for centuries and is meaningful to many executives, particularly those in nonprofits, governments, and NGOs.

The second measure is the ROI, expressed as a percentage. The formula compares the net benefits divided by the cost multiplied by 100. The net benefits are the monetary benefits minus the project costs. Derived from the finance and accounting field, the ROI formula is a common measure in businesses. Even consumers understand it, as they can clearly see ROI when they invest their money in a savings account with a financial institution. For most executives, it shows the efficient use of funds. Impact alone is one thing; knowing how the monetary value of your project compares to how much you spent on the project is another. The higher the ROI, the more efficient the use of the funds.

MAKING IT WORK

You can easily show the success of any endeavor that may be part of your work or responsibility by measuring success along five levels: reaction, learning, application, impact, and ROI. Just like any other activity, it's not what you know, but what you do. So, what do you do? Here are a few tips.

Clarify why you are evaluating this project. Begin with the end in mind. What do you wish to gain by doing this? When do you want to complete this evaluation? What will it look like? What types of data will you be presenting, and at what time?

The longer you wait, the more difficult it will be. We've never known anyone to start too early, but we've seen many start too late.

We recently wrote a book that provides a lot of information, and other books provide even more. See the publication section of the website. Our [website](#) offers other tools and templates. If you need support, ask for help.

You may want to partner with a coach or mentor. This can be an informal or formal arrangement. The coach may be a friend, colleague, or a coach certified by ROI Institute. You might even consider participating in the group coaching available through the ROI Certification process. See the website for more details.

Remember that failure is okay. Progress is important. The cornerstone of this methodology is a relentless focus on process improvement. If it is successful, take action to make it even more successful next time. If your project is unsuccessful, take action to improve it. Addressing disappointing results is easier than we sometimes think.

Celebrate success. Apart from your sponsor, share your accomplishments with others. Other people need to know your outcomes. Let your community know. Let us publish your study! The key is to celebrate success and let others learn from it—better yet, let them replicate it.

If you need to learn more, a variety of formal learning programs are available. A one-day overview workshop provides the essentials. A more comprehensive train-the-trainer workshop is also available. Finally, for those who want to become a Certified ROI Professional (CRP), an intensive program is available that includes education, group coaching, and application. The program focuses on completing an ROI evaluation of a project to earn the CRP designation.

The important milestone is that you have learned a critical skill. Use this process routinely in your daily activities. The Show the Value Process keeps you focused and makes you aware of what's possible and what is required to make any effort successful. It will help you gain support and commitment from others. It will also help you gain funding in the future.

So, remember, when it comes to delivering results, hope is not a strategy, luck is not a factor, doing nothing is not an option. **Change is inevitable; progress is optional. It's all up to you.** 📌

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