



The 2008

Measuring ROI in Human Capital Programs Conference

Using ROI to Transform Human Resources and Maximize
Value Throughout the Organization

Pre-Conference Workshop: June 10, 2008

Conference: June 11–12, 2008

Fairmont Chicago

Chicago, IL

Dear Colleague,

Measuring ROI in human capital is becoming the newest metric strategy for the HR executive. Sure, ROI has been around for many years—hundreds of years—to show the value of investing in capital expenditures such as buildings, equipment, and other companies. Now, it is being used to show the value of a variety of human resources projects and programs. Credible ROI values are developed, while capturing other types of data, as well.

Now, for the first time, The Conference Board is presenting a conference devoted entirely to the use of ROI in human resources. Attend this unique conference, and hear dramatic stories of how the value of a particular HR project or program has been captured, including the financial ROI. Hear how the results are used to protect budgets, improve relationships, enhance image, and yes, secure additional funding for the future.

The studies presented at this conference show how data are collected in a systematic, standardized way to generate reaction, learning, application, impact, ROI, and intangible data. These six types of data present a balanced profile of success, and in each study there is a technique to isolate the effects of the program on the impact data. The results are CFO friendly and desired by many top executives. This is perhaps one of the most useful and powerful ways for the HR function to change its image, connect to the business, and show the financial impact in the organization. Please join us for an exciting, content-rich conference.

Best Regards,

Jack J. Phillips
Conference Program Director
The Conference Board

Pre-Conference Seminar

Tuesday, June 10, 2008

Registration and Continental Breakfast: 8–9 am

Show Me the Money: The ROI Basics

Seminar: 9 am–5 pm

This introductory workshop shows how ROI is developed and utilized as an important, strategic tool for HR managers and executives. It shows the steps, elements, and techniques that comprise this comprehensive and systematic, yet credible process. After reviewing the rationale for using ROI, the process is approached step-by-step, showing methodically and systematically how ROI is developed from the beginning of a project to communicating the results to a variety of audiences.

After attending this workshop, participants should be able to:

- Make the business case for ROI
- Describe the steps and elements comprising the ROI Methodology
- Use the Guiding Principles to create credible studies
- Plan the next steps for ROI implementation

Using multiple parts, a detailed case study is examined and discussed by participants. Each participant will receive a 75-page workbook, a case study, the ROI Process Model and a copy of the presenters' new book, *Show Me the Money: How to Determine ROI in People, Projects, and Programs* (Phillips, J.J., and Phillips, P.P., San Francisco, Berrett-Koehler, 2007).

Presenters

Jack J. Phillips, Ph.D.

Chairman

ROI Institute

Patti P. Phillips, Ph.D.

President and Chief Executive Officer

ROI Institute

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June 11-12, 2008

Wednesday, June 11, 2008

Registration and Continental Breakfast: 8-8:45 am

Welcome and Introduction: 8:45-9 am

Measuring the Contribution of Human Resources: Why ROI and Why ROI Now?

General Session A: 9-10 am

This opening session traces the use of ROI in the HR function and describes the forces contributing to the use of ROI. It will show the key steps and elements of the ROI process while exploring some of the myths and mysteries of ROI. The latest benchmarking on the use of ROI is revealed. This session sets the stage for the conference and presents the fundamental ROI process.

Presenter

Jack J. Phillips, Ph.D.

Chairman

ROI Institute

Networking Refreshment Break: 10-10:15 am

Concurrent Sessions B1 & B2: 10:15-11:15 am (choose one)

Measuring ROI in Leadership Development: Showing How Leadership Skills Make a Difference

Concurrent Session B1: 10:15-11:15 am

Leadership development is often considered a soft process. This session examines the use of ROI in leadership development, demonstrating how studies are conducted to show the financial impact of a variety of different types of leadership development efforts. Vic Buzachero highlights studies conducted at Scripps and shows how they have added value to the Scripps system. This presentation shows how data were captured, and more important, how the data were used to make adjustments in the programs. It also highlights how ROI is being used in other HR efforts at Scripps.

Presenter

Vic Buzachero

Corporate Senior Vice President, Human Resources

Scripps Medical Centers

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www.conference-board.org/hrroi

A Case Study in Diversity Leadership and ROI Measurement

Concurrent Session B2: 10:15–11:15 am

Many organizations have justified investments in diversity on the basis of legal and compliance perspectives. Ed Hubbard has been showing organizations the value of a diverse workforce in more acceptable business terms—bottom-line profitability. For many years, achieving diversity results has been a key component of Prudential Financial's business strategy. Senior leaders decided that a strong diversity measurement process was needed and would include objectives for profile representation, environment, and diversity leadership. For the purpose of this case study, we will focus on diversity leadership and the impact it has had on achieving established objectives and embedding diversity firmly into the fabric of our business. Using ROI, Dr. Hubbard and Emilio Egea show how diversity makes a difference in the organization.

Presenters

Edward Hubbard, Ph.D.

President and Chief Executive Officer
Hubbard & Hubbard, Inc.

Emilio Egea

Vice President, Human Resources and Chief Diversity Officer
Prudential Financial

Measuring ROI in Talent Management: The Payoff of a Critical Process

General Session C: 11:15 am–12:15 pm

Most organizations today are focusing on critical talent in an attempt to understand which jobs are most critical to the organizations, how to attract top talent for those jobs, and how to retain the talent that is there. Consequently, a variety of programs are often implemented to manage the talent process. In this session, Lisa Edwards outlines a study on talent management, showing how the investment has paid off in financial terms.

Presenter

Lisa Edwards

Director, Global Learning and Development
Corbis Corporation

Luncheon: 12:15–1:15 pm

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Measuring ROI for Retention Solution: Case Study in the Department of Defense

General Session D: 1:15-2:15 pm

This Department of Defense agency was experiencing tremendous turnover, losing technical specialists to the high-tech industry. Dr. Wharff describes this unique solution, which included the implementation of a Master's degree program in the agency. This study shows the payoff of implementing the Master's degree program for high potential employees, detailing the actual value of the program, as well as the impact it had on lowering turnover. Do not miss this provocative and compelling case study.

Presenter

Deborah M. Wharff, Ph.D.
Technical Director
Department of Defense

Concurrent Sessions E1 & E2: 2:15-3:15 pm (choose one)

Skill-Based Pay – Does it Pay Off? An ROI Case Study

Concurrent Session E1: 2:15-3:15 pm

While the concept of skill-based pay has been used for some time, few studies have shown the actual financial payoff. Many executives are concerned about paying for skills instead of the job that is actually being performed. The payoff in skill-based pay is often in greater productivity and reduced turnover . . . and that is exactly what is demonstrated in this case study. Dr. Patti Phillips uses an interactive case study to show what is accomplished in the implementation of skill-based pay in a banking organization. The process is impressive, and the results are dramatic.

Presenter

Patti P. Phillips, Ph.D.
President and Chief Executive Officer
ROI Institute

Measuring ROI in Knowledge Management Systems

Concurrent Session E2: 2:15-3:15 pm

Because so many organizations are focusing on how they can acquire, maintain, and exchange knowledge, ROI becomes an important issue. This unique study, shows how ROI was used to measure the impact of a knowledge management system at Accenture. The results are captured with six types of data: reaction to the system, learning to use the system, use of the system, business impact, ROI, and intangibles. The speaker will present the process, step-by-step, showing the issues involved and the results obtained.

Measuring ROI in Human Capital Programs

Networking Refreshment Break: 3:15–3:30 pm (choose one)

Concurrent Sessions F1 & F2: 3:30–4:15 pm

Retaining the Right Players with Data and Dialogue Strategies

Concurrent Session F1: 3:30–4:15 pm

O2 has taken ROI and action planning to a new level by providing all 30,000 global employees a unique personalized action planning tool as part of their annual employee survey. The rich dialogue resulting from this process has transformed their survey to a true data and dialogue leadership strategy. In this session you will learn about their return on investment and how they worked to retain and motivate individuals to not just “stay” with O2 but to actively engage in behaviors to drive key business goals. In this session you will learn the history of their internal engagement process, how their survey and action planning process has evolved over time, the role of managers and employees, and the return on investment of their aggressive move to make action planning and ROI work a part of every employee’s role.

Danielle Lee

Employee Engagement Manager
O2

Theresa M. Welbourne, Ph.D.

President and Chief Executive Officer, eePulse, Inc.
Executive Education, University of Michigan

Measuring the ROI in Career Development

Concurrent Session F2: 3:30–4:15 pm

Most organizations invest in some type of career development program, but few have taken the steps to show the actual impact of these programs. This presentation traces how ROI is used to show a variety of career development programs and will show one particular study which generated tremendous impact. This study challenges the conventional wisdom that career development is necessary, but does not always have a financial payoff.

Holly Burkett

Editor-in-Chief
Performance Improvement Journal

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June 11-12, 2008

A Career Web site is more than just a basic HR function . . . It is a Strategic Differentiator

General Session G: 4:15-5:15 pm

For one large company, cutting-edge recruiting technology has become a strategic differentiator. A recently enhanced career Web site is more than just innovative, friendly, and fun; it is foundational to how the company attracts top quality talent. The company's Global Staffing organization, which oversees the hiring of its 200,000-plus employment base, including a significant portion of external hires, uses this powerful channel to develop relationships with candidates, helping them build their own career profiles and identify opportunities that best fit their qualifications and interests. Learn more about how the bank is leveraging its site to demonstrate return on investment.

Networking Cocktail Reception: 5:15-6:30 pm

Thursday, June 12, 2008

Continental Breakfast: 7:30-8:30 am

Concurrent Sessions H1 & H2: 8:30-9:30 am (choose one)

Measuring ROI in Problem Solving Teams

Concurrent Session H1: 8:30-9:30 am

In this session, Kirk Smith shows how the use of problem solving and decision making in work teams have tremendous payoffs in financial performance. Systematic problem-solving and decision-making processes can spark tremendous results from teams and work units. Typical payoff measures include productivity, quality, innovation, creativity, and breakthrough performance. Mr. Smith highlights two studies showing the financial impact in both problem solving and decision making.

Kirk Smith
Senior Consultant
Kepner-Tregoe, Inc.

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ROI Implementation

Concurrent Session H2: 8:30–9:30 am

This session shows how ROI is implemented in a systematic, methodical way. The use of ROI is more than just having a case study on one project or program, but it becomes a systematic, routine way of work—essentially changing the focus of the HR function. Melissa Scherwinski discusses how the VA has implemented this process over a seven-year period.

Presenters

Melissa Scherwinski
Director, ROI Implementation
Department of Veterans Affairs

Measuring ROI in Coaching

General Session I: 9:30–10:30 am

Coaching has experienced explosive growth, particularly in the business and executive coaching arena. This has brought much attention to the time and expenditures for this important process. This session explains how the financial impact for coaching is calculated using an actual case study. The study captures six types of data, including the financial impact.

Presenter

David Rock
Chief Executive Officer
Results Coaching Systems

Networking and Refreshment Break: 10:30–10:45 am

Forecasting ROI: Searching for the Leading Indicators

General Session J: 10:45–11:30 am

This provocative session shows how forecasting is used to predict the value of programs, showing key stakeholders in advance how their money will pay off for them. This presentation also reveals some of the recent benchmarking efforts to develop leading indicators for predicting human capital ROI.

Presenter

Jac Fitz-enz, Ph.D.
Founder and Chief Executive Officer
Workforce Intelligence Institute

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June 11-12, 2008

Creating and Sustaining a Results-Based Approach to ROI in HR: The Wachovia Story

General Session K: 11:30 am- 12:30 pm

Wachovia has been a leader in the application of the ROI methodology with sustained use over a twelve-year period. In this session, you will follow the critical path as their strategy forms, processes evolve, and resources are deployed in support of a strong assessment, measurement, and evaluation strategy for Human Resources, resulting in increased accountability, improved credibility, and direct links to business results.

Presenter

Debi Wallace

Senior Vice President

Advanced Analytics & Research Practice

Leader/Workforce Analytics

Wachovia

Closing Remarks: How to Make ROI Work for You

General Session L: 12:30 pm

This session discusses the outlook for ROI and its use and how an organization can embrace this methodology in an economical and feasible way. Specific suggestions for next steps and actions are included.

Presenter

Jack J. Phillips, Ph.D.

Conference Program Director

The Conference Board

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Registration Form

- Online** www.conference-board.org/hrroi
- By Phone** Call Customer Service at 212 339 0345
8:30 am to 6 pm ET Monday through Friday
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Cancellation Policy

Full refund until three weeks before the meeting.
\$500 administration fee up to two weeks before the meeting.
No refund after two weeks before the meeting.
Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

Team Discounts per person

For a team of three or more registering from the same company at the same time, take \$200 off each person's registration.

Hotel Accommodations

Fees do not include hotel accommodations. For reservations, contact the hotel directly no later than the cut-off date and mention The Conference Board's Measuring ROI in Human Capital Programs Conference.

Fairmont Chicago
200 North Columbus Drive
Chicago, IL 60601
Tel: 312 565 8000

Hotel Reservations Cut-off Date: Monday, May 19, 2008

Measuring ROI in Human Capital Programs Conference

Pre-Conference Workshop: June 10, 2008

Conference: June 11-12, 2008

Fairmont Chicago

Chicago, IL

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- Mail Fax E-mail

Agenda Code

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Please select your preferred concurrent sessions.

Wednesday, June 11, 2008

- B1 or B2 choose one
 E1 or E2 choose one
 F1 or F2 choose one

Thursday, June 12, 2008

- H1 or H2 choose one

Registration Fees payable in advance in U.S. dollars.

Pre-Conference Seminar (B67008-1)

Conference Board Associates \$1,445
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Conference (945008-1)

Register by February 28, 2008 and receive a \$200 early bird discount.

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