



ROI Calculation Document

People-First Leadership Development Program™

Instructions

Save the document with your name in the title, follow the three steps below and email back to your coach when completed.

STEP 1

List the goals you were focused on during the program in the first column of the blank ROI Calculation Chart below (each on a separate row).

STEP 2

Describe the impact of your leadership improvements on people, process and/or the business in the second column.

STEP 3

Calculate the financial/business impact of those improvements to people, process and/or the business. Ideas may include:

- **Productivity:** hours reduced from doing something more efficiently (e.g., processing customer requests faster)
- **Productivity:** because team members are now better empowered or motivated (e.g., faster at grooming user stories, reduced time on phone for customer requests, more sales to clients, etc.)
- **Efficiency:** less duplication of work because of better alignment and/or coaching
- **Retention:** less turnover on your team as a result of improved leadership (people typically leave their leaders, not the organization they work for)
- **Revenue:** Increased sales as a result of better coaching.
- **Innovation:** Better ideas resulting in product enhancements due to a more open and collaborative environment

STEP 4

Identify the percentage that leadership development contributed to the business improvement identified.

STEP 5

Multiply the percentage of improvement attributed to leadership development x Financial/Business impact. Create a total for all goals.

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Sample ROI Calculation Chart

| STEP 1: Leadership Goals What goals were you focused on in this program? | STEP 2: Impact of Improvement As a result of improving your leadership, what was the impact to people, process and/or the business? | STEP 3: Financial/ Business Impact What were the financial and/or business results? (e.g., productivity, efficiency, revenues, retention, innovation) | STEP 4: % Attributed to Leadership Development What factors contributed to this improvement? What % is attributed to leadership development? | STEP 5: Financial Impact Due to Leadership Development |
|--|---|---|--|---|
| Provide more one-on-one coaching | As a result of providing better coaching, my team members are better aligned and working on the right things resulting in better quality product releases and fewer bugs. | More efficient development sprints and fewer bug fixes 10 hours per month, 5 people, 5 months = 250 hours saved 250 hours x \$100 per hour = \$25,000 | <ul style="list-style-type: none"> • 50% to leadership development • 25% to new people operations process • 25% bug tracking tool | 50% X \$25,000 = \$12,500 |
| Improve methods by addressing inefficient systems | As a result of improving methods, we reduced time to onboard new clients by 1 hour. | 1 hour of savings X \$100 per hour X 200 clients = \$20,000 | <ul style="list-style-type: none"> • 50% to leadership development • 50% to new software | 50% X \$20,000 = \$10,000 |
| Create an energizing and motivating team environment | Reduced turnover by 20%. | Cost to hire, onboard and get a new team member productive is 1.5x their salary. Salary of \$40k resulted in savings of \$60k. | <ul style="list-style-type: none"> • 75% to leadership development • 25% to manager support | 75% X 60,000 = \$45,000 |
| Total Financial / Business Impact | | | | \$67,500 |

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| Total Financial / Business Impact | | | | |

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