



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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