

<h2>Financial</h2> <ul style="list-style-type: none"> •Quality of Financial aspect of Bus. Plan (3rd party to eval; end of week 2) •Recruitment cost to fill position that can't be Filled by int. candidate (every 6mos. -%chg.; HR) •Turn over rate comparison: hi po @ level 1+2 Vs. non hi po @level 1+2 (every 6 mos.;HR) 	<h2>Strategic</h2> <ul style="list-style-type: none"> •Assessment by Div VP to determine increase In strategic thinking (pre;end of 6 mos.prgm.) •Self assessment of strategic thinking (pre,post) •Assessment by coach (end of 6 mos.)
<h2>Leadership</h2> <p>As compared to 6 mos. Ago, how would you Rate this person's overall readiness to assume Significantly expanded roles & responsibilities W/in 3-5 yrs.</p> <p>1 Not at all</p> <p>2</p> <p>3</p> <p>4</p> <p>5 Completely</p>	<h2>Operations</h2> <p>To what extent has this person contributed to Improvement of operational efficiency & Effectiveness in his business unit over the last Year?</p> <p>1 Not at all</p> <p>2</p> <p>3</p> <p>4</p> <p>5 Significantly</p>

Group 7

Scenario B –

ROI for a New Open Enrollment Program

Assumptions

- State of Art Program
 - “Yukon State University Marketing Academy”
- Marketing Faculty committee to development
- Interest by Client organizations
- ROI requires departure from conventional design methods
- Program Director has design experience
- Mid-level Managers
 - Technical background
 - Move into positions in marketing
- Program is classroom based
- Standard pricing structure

Question One – Course Content

- o ID Company Needs
- o Benchmark other schools doing it
- o Determine faculty intent/expertise
 - o need to go outside

Question Two – Projects

- o No – but long discussion
- o Resource intensive
- o Better for custom programs
 - ...public program may lead to custom

Question Three – Pricing

- o Consistent with existing pricing
 - discounts for
 - early enrollees
 - group discount
 - company discount
- o Check vs. market
- o Seed enrollees
- o Early clients pay for development

Question Four – Marketing

- o Pre-sell to companies with intent
 - o possibly fill with them
- o Sell to other industry players
- o Alumni
- o Normal public program target market
 - o publicity
 - o existing client companies
 - o etc.

Question Five – ROI

To Client

- o Program differentiator/competitive edge
- o Sell ROI to early enrollees/companies
- o ID their ROI Criteria
 - o merge into one set
 - o pre/post assessment
 - o benchmarking
 - o reference Antoine's slides
- o Check what other Universities have done

ROI to School

1. Profit
 2. Faculty
 - Contribution to faculty salary
 - Development of faculty
 - Faculty Recruitment
 - Research Opportunities
 3. Brand Contribution (including politics)
 4. Use of Faculty
- 2&3 depend on School Objectives

ROI to Faculty

(Didn't pursue)

Question Six - Value

- o Testimonials
- o Referrals
- o ROI
 - o for own marketing (otherwise just a cost)
 - o will deliver new clients for the school

Group 8



UNICON UNIVERSITY

ROI of Past Programs

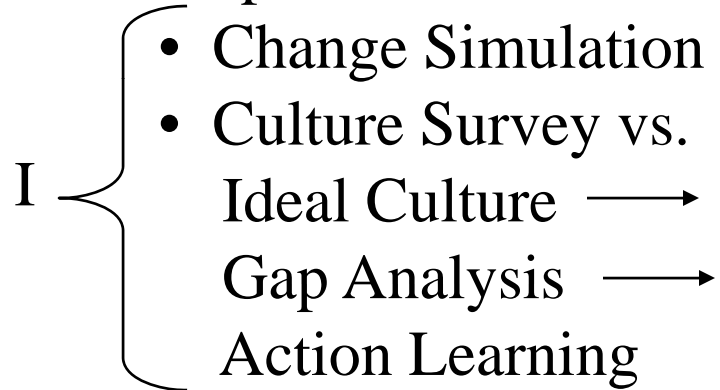
- Critical Incident Analysis
- Sampling of Past Participants
- ROI = $\frac{\text{Benefit} - \text{Cost of Program}}{\text{Cost of Program}} \times 100$
 - Cost of Program = \$750K + 1/24 (Exec Salary)
 - Benefit = Mean Critical Incident * 71
- Evaluation of Return
 - ROI > Firm's Cost of Capital

COMPETENCIES

- Leading Change
- Develop Common Culture
- Strategic Thinking
- Understanding New Business
- Communication

PROGRAM DESIGN

- Modular
- Address Two Populations
- Components



- II - • General Management

MEASURES

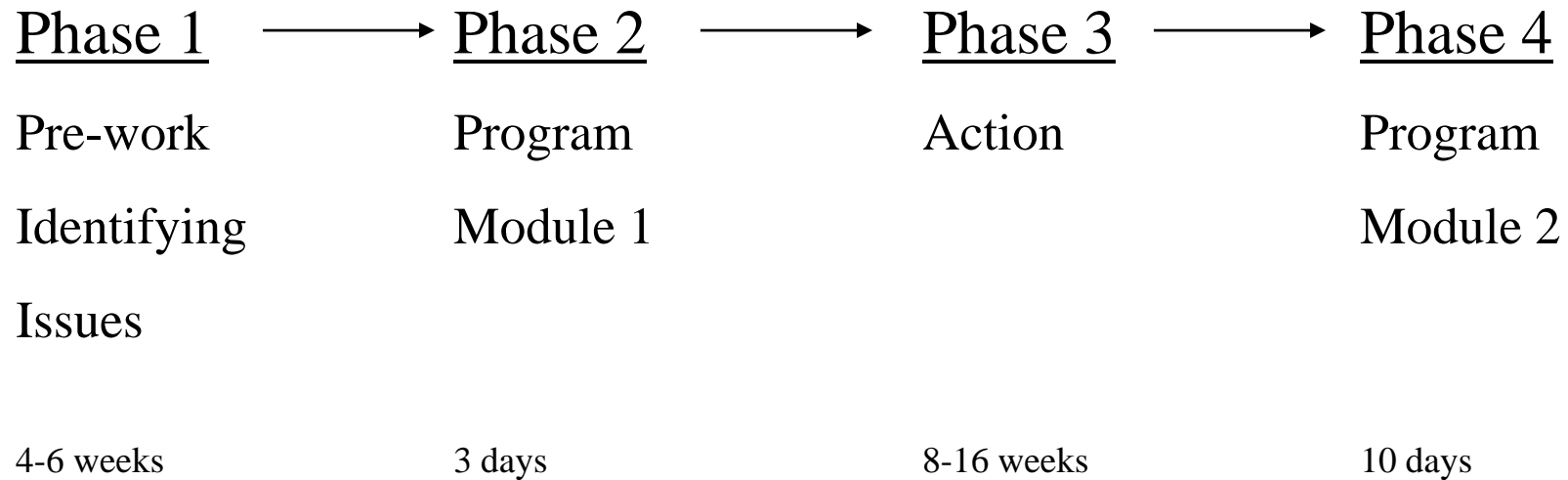
- Culture/Employee Attitude Survey
- Monitor Cost Savings w/in 12 Months
- Retention Rates
- 360 Before/After Program

MEASURES

<u>Financial</u> Cost Savings (Duplication, Turnover)	<u>Strategic</u> Understanding & Implementation (360/Employee Attitude)
<u>Operations</u> Process Improvements	<u>Leadership</u> Retention/Culture Change Critical Incident Analysis

The diagram consists of a 2x2 grid. In the bottom-right cell, the text 'Leadership Retention/Culture Change Critical Incident Analysis' has three arrows pointing towards the top-left, top-right, and left cells of the grid.

PROGRAM LEARNING PROCESS



Phase 5

Integration

3-12 months

Group 9

What is the Role of the Business School?

What are the Capabilities within the school as you move out of the circle?



Moving from Inside
Circle out

- less control
- greater risk

But closer to meeting
Client's objective

Investment Increases
As you move Out

Performance Based Contract

Objective

Building Bench Strength:

Measured by What?

Many uncontrollable factors

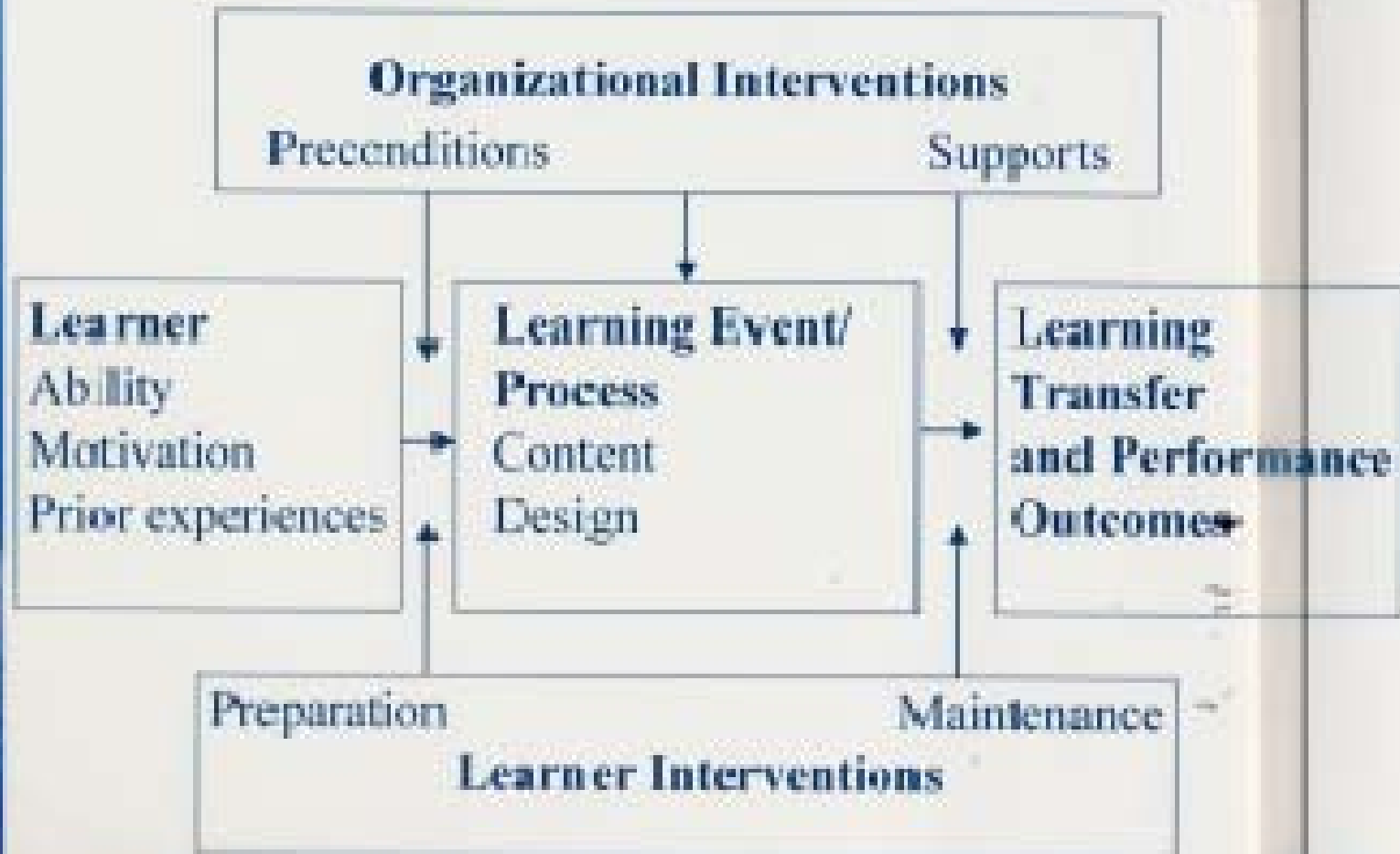
Risks – pts

Uneducated client

Internal processes of companies

1. Strategic Partnership
 - ✓ Performance based (over time)
 - ✓ Both school/co responsible
2. Link to co's core competencies
 - ✓ Eg. Finance/acctg skills
3. Measurables
 - ✓ Pre/Post Test
 - ✓ Specific Q's on Evaluation that's realistic
e.g. able to read P/L & balance sheets & explain
 - ✓ Various Phases/stages
based on program
gap analysis/coaching
talent development
 - ✓ Kirkpatrick Model
Level 1
Level 3 (overtime)

A Conceptual Framework For Managing Learning Transfer Systems



Group 10

PERFORMANCE BASED ASPECT

Overall group assessment

- if metrics $\nearrow > 10\%$
 - performance – based incentive $\nearrow 10\%$
- if no change in metrics
 - we refund 10% of program cost



Management
Acceleration
Program for
Leadership
Effectiveness

COMPONENTS

Pre-Program

- * CEO Chat
- * Competency Assessment
 - Company
 - Participants' Self –Assessment
 - Participants' Direct Supervisors

COMPONENTS

Program Design

Week 1

General Mgt.

- * Leadership Ops
- * Strategy
- * Corporate Valuation (analyst)
- * Action Learning Group Project

4-6 WEEK INTEGRATION PERIOD

Coaching & Mentoring on
Action Learning Projects

COMPONENTS

Program Design

Week 2

Negotiations

Change Mgt./Mktg.

Team Building

- Action Learning Project Presentations

5 plus
powerpoint
on laptop

Team 5 – Scenario D (Kelly’s notes)

ROI for Custom Programs

-- long term relationship – shift from transactions understand the resp. of client/school?

How do we take level 1-4 components & make them work –

What are the objectives for each level & each comp.

Ask these questions?

What	Resp.	Timing	Likert Scale
	Comp	Univ.	
Level 1			
2			
3			
4			

Changes the perspective on how we look at the relationship

FINANCIAL

<u>What</u>	<u>Responsibilities</u>	<u>Timing</u>	<u>Likert Scale</u>
Objective A	<u>Company</u>	<u>University</u>	
Level 1			
Level 2			
Level 3			
Level 4			

Group 2

Kelly's Notes

Team 2 – Scenario

Use balanced scorecard method

Profit financial	Policy strategic
Process operational	People

Benefits

Total cost – program fee, transportation, personal costs

Policy – strategic thinking, business growth, structure

Process - best practices (\$\$), productivity gains, process improvements

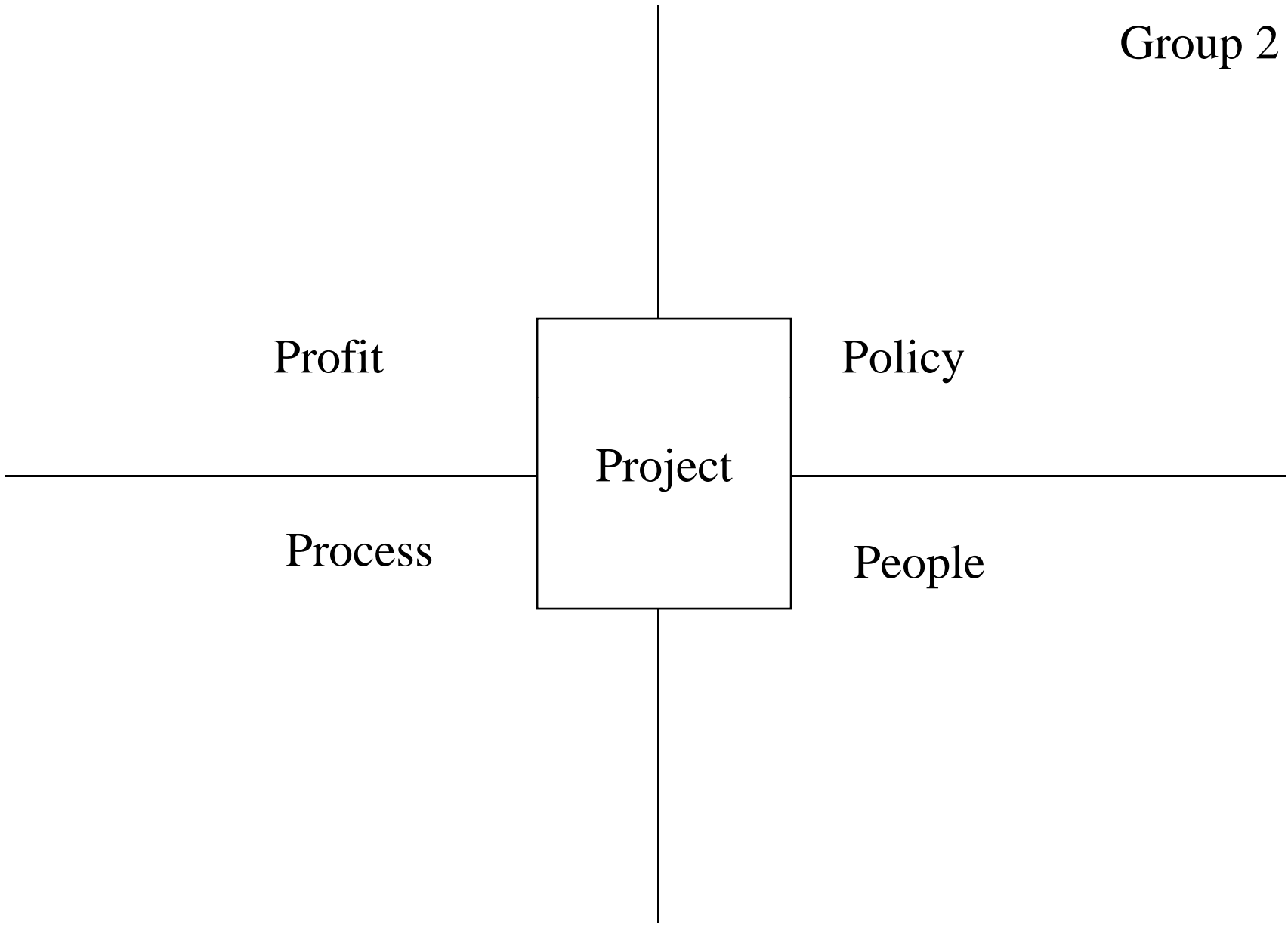
People – more strategic decisions, developing future leaders/keeping,
er of choice(moral boost) pipeline flowing, social capital, networking

How would we measure the networking component?

Social network analysis – Rob Cross

Centrality – manage the flows of information

Management of flows vs. Management of structure



Profit

Policy

Project

Process

People

Group 2

Profit

Benefit to company from
project, ie \$\$ saved

revenue earned

retention gains

Policy

Strategic Thinking

Business Growth

Structure

Process

Best Practices (\$\$)

Productivity gains

Process Improvements

People

More Strategic Decisions

Developing future leaders –
Keeping pipeline flowing

Employer of choice – (morale
boost)

Social capital/networking

Total Cost:

Program Fee

Transportation

Personal costs

Changes in Design:

Add teaching element (Transfer of Knowledge)

Senior Management signoff on project

Telephone follow-up after 3 months

final follow-up after 6 months

Group 3

TRAINING FRAMEWORK

1. Define Performance Criterion
2. Identify a Criterion Sample
3. Develop a Business Case
4. Collect and Analyze Data
5. Program Design
6. Train, Monitor, Coach
7. Evaluate Effects of Training

PAST COSTS/IMPACT

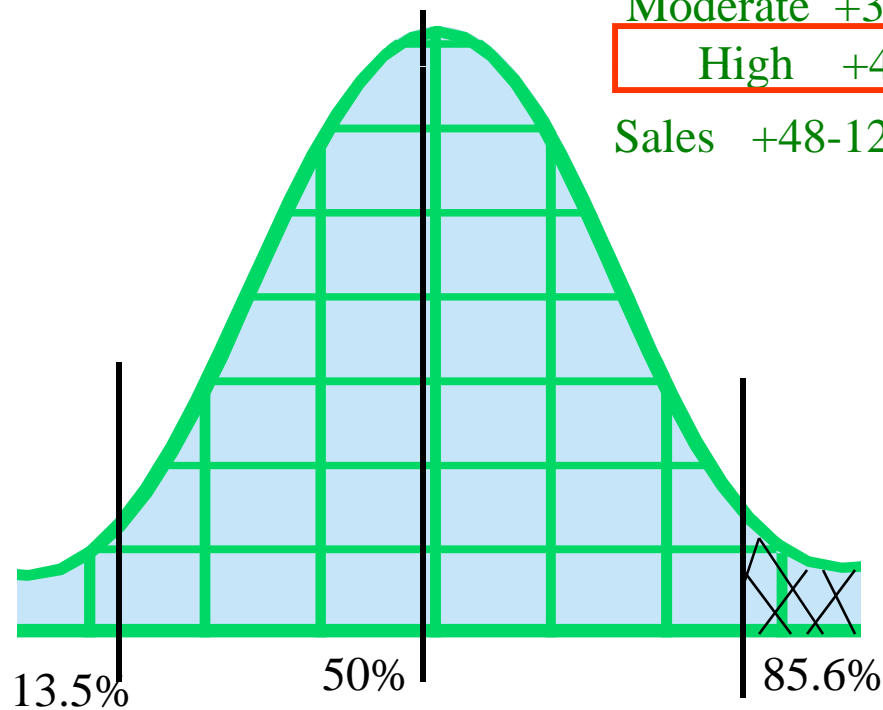
Course Development	\$35.0K
Instructions	\$157.5 K/year
	<hr/>
Total	\$472.5K
Questionnaires	\$5,325
	<hr/>
Total Costs	\$750K
	<hr/> <hr/>

Impact/Feedback: 4.4 out of 5

DIFFERENTIATING SUPERIOR PERFORMANCE

Productivity

Job Complexity:



ISD %

Low +19% = 119%

Moderate +32% = 132%

High +48% = 148%

Sales +48-120% = 148-220%

Team 3

FUTURE PROGRAM

100 Participants

4 years

- o Redesign \$20K
 - o Instructions(including materials) \$630K
 - o Questionnaires \$7,500
 - o Total Costs \$657.5K
- \$164.2K/year

$$\text{ROI} = \frac{(\$120\text{K} - \$100\text{K}) - 657.5\text{K}}{\$657.5\text{K}} = \text{97\%}$$

Scenario C

Introducing....

“Naraider” Fiona van Haeringen

ABC Company:

CFO – Dan Stotz

Sr. VP HR – Robin Hollis

G’Day Officer – John Urbano

(participant)

Vekandoit University:

Director, Exec. Ed. – Urs Bernhard

Academic Director – Jan Kingsley

Program Director – Laurie Dowling

MBA Team Lead – Rob Schumacher

Scene 1:

Trouble in Paradise...

Location: CFO Office

ABC Company

Scene 2:

Meanwhile back at the Ranch...

Location: Conference Room

Vekanndoit University

Scene 3:

The Moment of Truth...

Scene 4:

As you Like it...

Group 4

Kelly's Notes

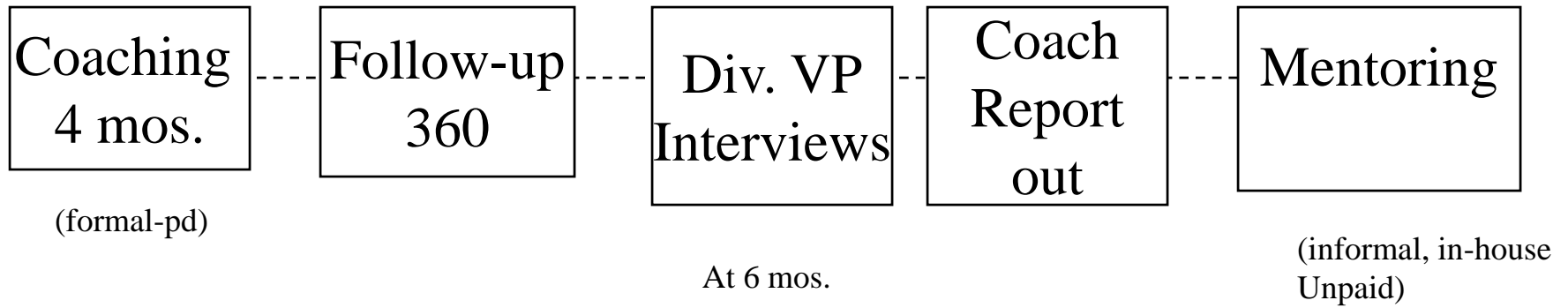
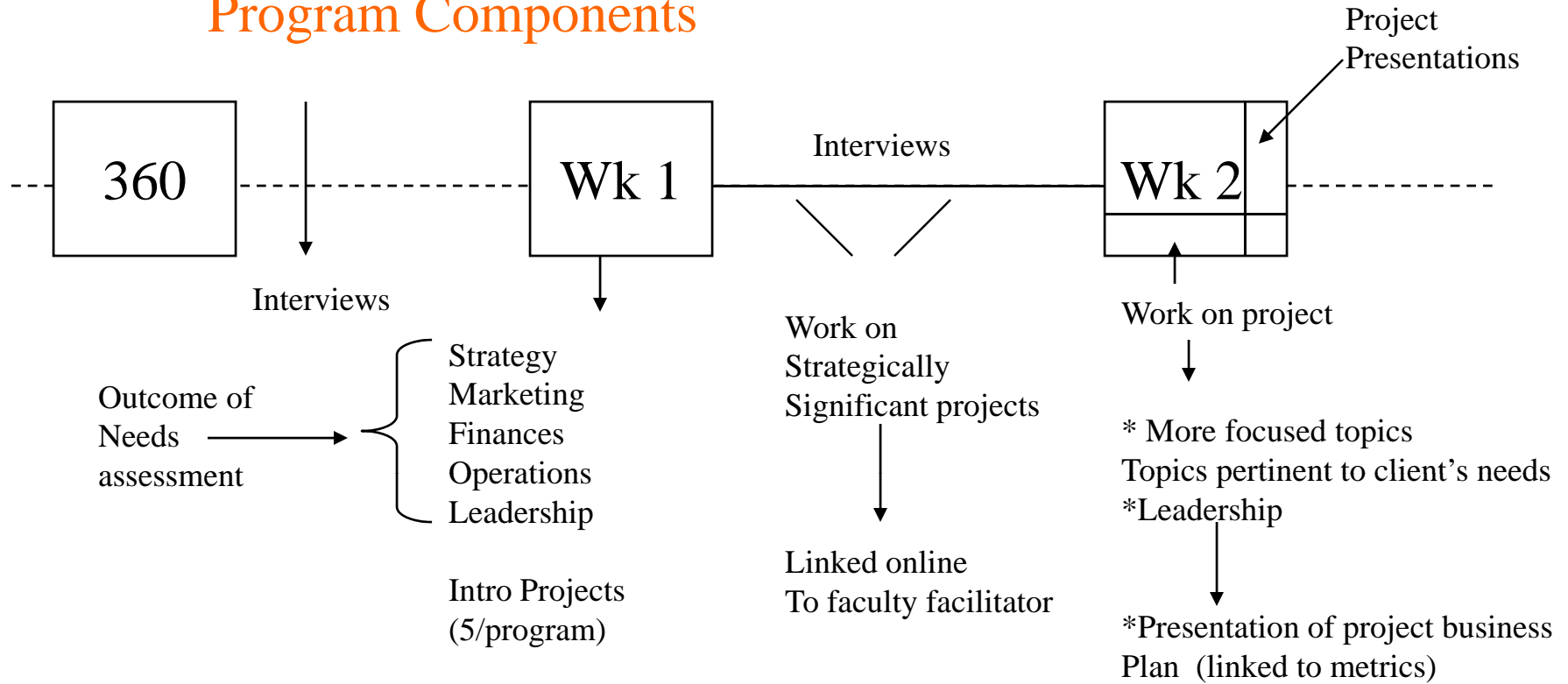
Maintain a third party assessor to come up with diagnostic and measure

- Work with 3rd party

- Share the risk with faculty and executive education

1. 360 initial assessment
2. Prior to start of program – interviews by supervisors
3. Week 1 – various topics based on needs assessment -
Introduction of strategically significant projects by executive sponsor
5 people per team
5 projects per program
4. Interim period after first week of 6-8 weeks
linked online to each other AND faculty facilitator
5. Week 2 – drill down deeper to more focused topics pertinent to client's needs
Presentation of project business plan which is linked to metrics
6. After week 2 – 4 months of formal mentoring (paid)
7. Follow-up 360
8. Coaches report out
9. At 6 months division VP interviews of participants
10. Ongoing informal in-house mentoring

Program Components



* Exec Committee sponsor for each project

PERFORMANCE BASED CONTRACT

\$2 million contract

80% payment at conclusion of each color +
20% at risk, 10% max upside if exceed targets

ROI assessment: 6-12 months after each program

Payout Formula:	< 4.0	0%
	4.0-4.39	90%
	4.4-4.69	100%
	4.70 ≤	110%

Leadership 25% weight

based on aggregate 360 feedback

Operations 25% weight

based on aggregate 360 feedback

Strategic and financial metrics similar, TBD

Note: Faculty & Staff pay tied to performance metric