

ROI INSTITUTE®

Creating an  
ROI Network





The Oxford Dictionary defines networking as the action or process of interacting with others to exchange information and develop professional or social contacts. That definition is perfect for describing an ROI Network. From the beginning of the ROI Certification process, networking has been an essential component. For example, the first public session for the ROI Certification was conducted in Nashville, Tennessee, in December 1995. The next session was held in March 1996 in the same city. The second group raised this question: “Could we contact the first group and do some networking with them?” That was the beginning of ROI networking, and from that point, networking has been beneficial for many individuals involved in using the ROI Methodology.



#### **Within the Organization**

When individuals attend ROI Certification and begin their implementation journey, we recommend connecting with others interested in ROI and becoming involved in a network. Many, if not most, ROI implementations in large organizations include a structured ROI network. The starting point for networking is within an organization. For example, Verizon Communications has a large internal ROI Network with several hundred members.



#### **Within the Local Area**

Another possibility for a network is within the local area. Sometimes organizations in an area will create a network within a city, a metropolitan area, a state, or even a US territory. These networks bring together others involved in this process to connect, share information, and collaborate. For example, a State of Mississippi ROI network and a City of Los Angeles ROI network were created.



#### **Within a Country or Region**

Many countries establish ROI networks to connect individuals interested in and involved with ROI. For example, Klaas Toes, CEO, ROI Institute Europe, created a network for the Netherlands that allows ROI professionals to support each other and help grow ROI use in that country. A regional network can help coordinate activities within a region, such as an ROI network for the Middle East, Europe, or South America.



#### **The Global ROI Network**

As of 2021, more than 16,000 individuals have completed ROI Certification. As part of this process, the individuals become members of the global ROI network organized by ROI Institute. The global ROI network connects all individuals who implement and use the ROI Methodology.

# Typical Network Issues

Network organizers need to address five issues to move the network from an idea or an informal process to a more structured, influential network.



## Communication Methods

Deciding how to manage communications is critical. Will the contact be based on a platform, such as WhatsApp, Slack, Facebook, or LinkedIn? Or will it be through text or email? In some cases, maybe a virtual or print newsletter would be possible.



## Membership Rules

Who is allowed to join the network is essential. Everyone who attends ROI Certification should automatically become a member. Additionally, networks can be open to individuals who attend a one- or two-day ROI workshop and are interested in supporting, assisting, and implementing the ROI Methodology. Other networks may wish to offer membership to anyone interested in ROI and a desire to contribute in some way to advance the process.



## Meeting Times

Should there be a formal or ad hoc meeting schedule? Most networks hold regularly scheduled meetings, usually every quarter. Some very focused networks meet monthly. The meeting schedule will depend on the needs of the group. Virtual arrangements are appropriate for most networks, while an in-person format is ideal for others. If the network is inside an organization with most members located at one facility, it is easier to have an in-person network meeting at that location. If the organization operates globally, virtual sessions are more practical.



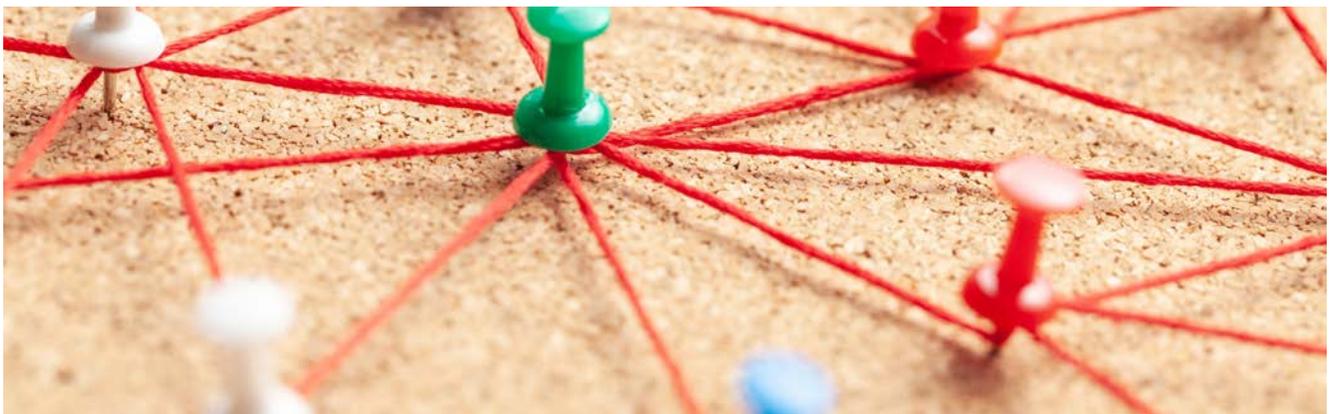
## Topics or Issues

The topics discussed and issues explored should be determined early in the process. This planning generates interest in the network, keeps the networking process-focused, and prevents interactions from going astray with unrelated issues. The key is to identify the topics, publish them, and follow a plan or agenda.



## Monitoring and Managing

A network must have a leader and others who can support the process. More formal networks have an executive director or network manager. Some might have volunteers who fill the roles of program leader, communication leader, and finance leader (if dues are part of the membership).



# Typical Network Topics

Topics for discussion can vary according to the organization, members' needs, and the networking group's maturity. Here are six areas of possible topics:



## Tools and Template Sharing

Perhaps one of the most important reasons for networking is to share tools and templates. Someone may have created an excellent feedback survey or have a great example of an infographic. Sharing resources with others can be extremely helpful.



## Collaborative Projects

Sometimes a network takes on a project that is important just to them. The project may be important in their professional community, such as tackling key resistance areas, exploring new approaches to achieving the desired impact, or making projects more successful. Some collaborative projects may involve conducting an impact/ROI study for a nonprofit organization, using volunteers to conduct the study. For example, the United States Social Security Administration's ROI network, which has its anchor in the IT function, used its members to help the local food pantry show the impact on the community.



## Research and Benchmarking

The critical function of research and benchmarking is to routinely capture data that shows the progress made in driving results. A typical survey asking, "How results-based are your programs?" should be conducted with the network member each year to gauge progress. Other research may be performed around technology use, the types of projects being developed, and critical activities to generate funding for measurement and evaluation. One of the most important research topics is the status of measurement in a country or region.



## Sounding Board

One of the more critical functions of networking is to serve as a sounding board for executive briefings before the briefing is presented to the senior team. This process provides a critique to the presenter so that adjustments can be made before the actual presentation to the senior team. For example, the Puerto Rico ROI network in San Juan provides this helpful service to its members.



## Project Critiques

Networking groups can explore existing projects, fully completed projects, and even published case studies and present them to others as a learning exercise. This functions much like a book club. This approach also provides a critique of how the project was completed and how it could be improved. Studies conducted by other organizations, even using different methodologies, could be presented and analyzed for their effectiveness, success, and credibility.



## Technology Review

Another benefit of the network is to share technology, tools, software, and apps. With the costs of technology and the proliferation of tools to assist professionals in project management, analytics, and evaluation, helpful guidance is welcomed. These tools can be critical to making analysis and evaluation more effective with fewer costs and less time commitment. Conducting periodic reviews of new technologies would be an ideal feature within network meetings.

## Summary

To summarize, networking is a great way to build support and resources to implement the ROI Methodology effectively in an organization, an area, a state, a country, a region, or globally. If you would like additional information on how to establish an ROI network, contact ROI Institute.



## About ROI Institute, Inc.®

ROI Institute, Inc., founded in 1992 as a service-driven organization, assists professionals in improving programs and processes using the ROI Methodology® developed by Dr. Jack J. Phillips and Dr. Patti P. Phillips. This Methodology is the global leader in measurement and evaluation, including the use of return on investment (ROI) in non-traditional applications. ROI Institute regularly offers workshops, provides consulting services, publishes books and case studies, and conducts research on the use of measurement and ROI. This makes ROI Institute the leading source of content, tools, and services in measurement, evaluation, and analytics. ROI Institute applies the ROI Methodology in 20 fields in over 70 countries, working with more than one hundred ROI consultants. ROI Institute authors have written or edited over 100 books translated into 38 languages. Organizations build internal capability with the help of ROI Institute and its ROI Certification process. By completing this process, individuals are awarded the Certified ROI Professional® (CRP) designation, which executives in organizations worldwide respect.

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