

Three Checklists

Annual benefits

Annual costs

Investment costs



Benefits Checklist

- ✍ Average hourly salary of the target audience in savings
- ✍ Average burdened salary of the target audience (including benefits and facilities costs)
- ✍ Time savings
- ✍ Materials savings
- ✍ Facilities savings
- ✍ Savings on capital equipment
- ✍ Recruitment savings
- ✍ Turnover savings (cost to replace workers)
- ✍ Savings from not training new employees (if turnover is reduced)
- ✍ Increased sales
- ✍ Decreased inventory
- ✍ Other

Annual Costs Checklist

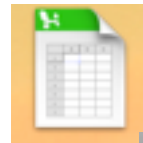
- ✍ Increased management time to administer new process
- ✍ Time to comply and complete new process
- ✍ Increased management and employee collaboration time and associated cost
- ✍ Rental and licensing fees associated with software and equipment supporting the new initiative
- ✍ Increased travel required to support the new initiative
- ✍ Lost opportunities due to displacing select current activities with new initiative

Investment Checklist

- ✍ Training development
- ✍ Trainer/facilitator
- ✍ Web hosting
- ✍ Programming
- ✍ Duplicating materials
- ✍ Binders
- ✍ Supplies
- ✍ Facilities
- ✍ Meals
- ✍ Travel for trainer/facilitator
- ✍ Travel for participants
- ✍ Time (labor costs) for participants
- ✍ Lost opportunity or replacement labor for participants
- ✍ Other

Proforma ROI Tool

Email Darryl for a copy of the tool.



Pro-Forma ROI Tes_04.xls

	A	B	C	D	E
1	The Profit Ability Group, Inc.				
2	and Darryl L. Sink & Associates, Inc.				
3					
4	Calculating the PRO-Forma ROI for Investing in a Training Program				
5	(enter values in shaded cells, enter "0" if no benefit or cost for the year)				
6					
7	First, Estimate the Annual Benefits	Template		Example	
8	Benefits in year one (cost reductions or revenue increase due to the training)			\$300,000	
9					
10	Benefits in year two (cost reductions or revenue increase due to the training)			\$500,000	
11					
12	Benefits in year three (cost reductions or revenue increase due to the training)			\$500,000	
13					
14	Benefits in year four (cost reductions or revenue increase due to the training)			\$0	
15					