



**A GUIDE TO MEASURING YOUR TRAINING RETURN ON INVESTMENT (ROI) –  
THE BFI METHOD**

Evaluate the effectiveness of your bespoke training initiatives, measure the impact on performance and business outcomes, and make informed decisions to optimise future training investments and drive ROI

**Key Performance Indicators (KPIs) to measure Return on Investment (ROI) for an in-house bespoke live training course may include:**

<b>KPI</b>	<b>What to measure</b>	<b>How to measure</b>
<b>Design costs</b>	Calculate the total cost of developing the bespoke live training course	<b>Include expenses related to:</b> <ul style="list-style-type: none"> <li>• Content creation</li> <li>• Consultations to establish precise needs and focus of the training</li> <li>• In-depth discussion with potential trainer to establish relevant experience, fit and appropriate methodology of delivery</li> <li>• Instructional design, customisation, and material</li> <li>• Pre-training engagement maximised by collaboration between provider and learners</li> </ul>
<b>Values, ethics and professionalism</b>	Ensure your training provider is aligned with your own organisation’s values, ethics and professionalism, so they can support your business objectives and provide standardised and consistent training for your organisation	<b>Establish the following:</b> <ul style="list-style-type: none"> <li>• Are the highest ethical standards adhered to?</li> <li>• Is a non-political stance maintained?</li> <li>• Do they have verified qualifications and established experience to deliver expert advice?</li> <li>• Do they have professional indemnity?</li> <li>• Are they knowledgeable and trained in appropriate training methodology, ensuring effective delivery and engagement?</li> <li>• Will your organisation benefit from a bank of tried, tested and fully vetted experts?</li> </ul>



		<ul style="list-style-type: none"> <li>• Can you expect a personalised match with an experienced trainer?</li> </ul>
<b>Course design and delivery</b>	Can you measure the effectiveness of the methodology and content?	<p><b>Considerations about the course quality:</b></p> <ul style="list-style-type: none"> <li>• Relevance of content to subject matter</li> <li>• Application of content to participant job roles, experience and seniority</li> <li>• Delivery: methodology, engagement, structure, pace, break times and lengths, formal versus informal, questions and feedback timings and weight</li> <li>• Instructor effectiveness, approachability, energy and relationship building with delegates</li> <li>• Confidentiality and space to discuss learner experiences, issues and specific questions</li> <li>• Quality of training materials</li> <li>• Time efficiency</li> </ul>
<b>Participant engagement</b>	Measure participant engagement levels during the live training course	<p><b>Does your provider report back after the course with quantified:</b></p> <ul style="list-style-type: none"> <li>• Active participation</li> <li>• Interactions with instructors and peers</li> <li>• Content and frequency of questions asked</li> <li>• Overall engagement with the course content</li> <li>• Engagement and completion rates (e.g., participation in chat, questions asked, cameras on)</li> <li>• Empirical feedback from experienced course facilitators</li> <li>• Trainer feedback on strengths and areas for follow-up training</li> <li>• Course completion rate</li> <li>• Assessment pass rate</li> <li>• Retention and recall of knowledge through polls, quizzes, and certificates</li> </ul>
<b>Learning outcomes</b>	Are you able to ascertain whether and to what extent	<p><b>Does your provider establish and collate overall strategic training objectives:</b></p> <ul style="list-style-type: none"> <li>• From HR or L&amp;D colleagues</li> </ul>



	<p>learning outcomes were met?</p>	<ul style="list-style-type: none"> <li>• Does the provider survey, establish and meet individual participants learning objective before and during the training course?</li> <li>• Were you able to dovetail training goals with your overall organisational strategy?</li> <li>• Did you set SMART goals?</li> <li>• Did the training support the overall learning strategy of your organisation?</li> </ul>
<p><b>Participant feedback</b></p>	<p>How can you assess the extent to which participants achieve the learning objectives and desired outcomes of the training course?</p>	<p><b>Does your provider give feedback on:</b></p> <p><i>BFI delivers a full post-course report on the following areas -</i></p> <ul style="list-style-type: none"> <li>• Content relevance</li> <li>• Delivery methods</li> <li>• Trainer effectiveness</li> <li>• Overall learning experience</li> <li>• New knowledge and skills acquisition</li> <li>• Skill improvement</li> <li>• Behaviour changes because of the training</li> </ul> <p>The impact for both individuals and your organisation, leading to:</p> <ul style="list-style-type: none"> <li>• Increased efficiency</li> <li>• Reduced costs/savings</li> <li>• Compliance</li> <li>• Reduced reputational risk</li> <li>• Employee retention rate</li> <li>• Understand satisfaction levels and identify patterns and areas for improvement</li> </ul> <p>Survey forms and live polls:</p>



		<ul style="list-style-type: none"> <li>• Immediate feedback through survey forms and live polls</li> <li>• Evaluate content, timing, trainer performance, and relevance to roles</li> <li>• Review specific learning objectives collected at the beginning of the session and check back during the day to ensure they are met</li> </ul> <p>Learning and met objectives:</p> <ul style="list-style-type: none"> <li>• Identify skills learned, developed, or refreshed</li> <li>• Isolate specific learning, such as new legislation, processes, etc.</li> <li>• Ensure all objectives are met within the scope of the initial brief</li> <li>• Address any subjects outside the original agreed course in subsequent training, discussed in the wash-up session</li> </ul>
<b>Application in the workplace</b>	In what way do you plan to evaluate the application of knowledge and skills acquired during the training course in the participants' day-to-day work?	<p><b>Will your training allow you to:</b></p> <ul style="list-style-type: none"> <li>• Measure the impact of the training on job performance, productivity, and business outcomes.</li> <li>• Did the training create new and legacy knowledge?</li> </ul>
<b>Post-training support</b>	Can you assess the value and effectiveness of post-training support provided?	<p><b>Compare the quotes and proposals to establish the quality and extent of:</b></p> <ul style="list-style-type: none"> <li>• Follow-up resources</li> <li>• Coaching, mentoring, or reinforcement activities</li> <li>• Ongoing support on knowledge retention and application</li> </ul>
<b>Return on investment</b>	Calculate the ROI of the bespoke live training course by comparing the total benefits or outcomes achieved, such as increased productivity, cost savings, improved performance, or	Use the formula: $(\text{Total Benefits} - \text{Total Costs}) / \text{Total Costs} * 100$ to determine the ROI.



	enhanced skills, against the total costs incurred	
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Blank worksheet for notes:

KPI	What to measure	Refer to - How to measure
<b>Design costs</b>	Calculate the total cost of developing the bespoke live training course	
<b>Values, ethics and professionalism</b>	Ensure your training provider is aligned with your own organisation's values, ethics and professionalism, so they can support your business objectives and provide standardised and consistent training for your organisation	
<b>Course design and delivery</b>	Can you measure the effectiveness of the methodology and content?	



<b>Participant engagement</b>	Measure participant engagement levels during the live training course	
<b>Learning outcomes</b>	Are you able to ascertain whether and to what extent learning outcomes were met?	
<b>Participant feedback</b>	How can you assess the extent to which participants achieve the learning objectives and desired outcomes of the training course?	



<b>Application in the workplace</b>	In what way do you plan to evaluate the application of knowledge and skills acquired during the training course in the participants' day-to-day work?	
<b>Post-training support</b>	Can you assess the value and effectiveness of post-training support provided?	
<b>Return on investment</b>	Calculate the ROI of the bespoke live training course by comparing the total benefits or outcomes achieved, such as increased productivity, cost savings, improved performance, or enhanced skills, against the total costs incurred	

