

ROI Checklist

As you work to identify and measure the costs, savings, and return on investment (ROI) associated with your integrated program, the checklist below will serve as a tool to help you think through the possibilities.

KEY QUESTIONS	ANSWERS	COMMENTS
Have you defined the objectives of your integration efforts?		
What is your organization trying to accomplish and why?		
What are the specific outcomes that can be associated with the accomplishments and why?		
How can the measures be tied to:		
How the business works?		
How finance allocates expenses?		
Who the stakeholders are?		
How the business defines the language it uses for measures?		
Who the audience is and what the potential ROI areas are?		
Which of the following data gathering strategies will be used by your organization?		
Database queries and specific report extraction		
Employer population demographic detail summary and confirmation		
Structured individual interviews of key stakeholders		
Focus group discussions with stakeholder groups		
Surveys and/or questionnaires		
Onsite observations		
Benchmark and source identification		
Other		
Which of the following methods will your organization utilize to justify integrated program costs?		
ROI methods		
Break-even calculations		
Impact assessment		
Efficiency assessment		
Coverage assessment		
Service delivery assessment		
Fiscal assessment		
Legal assessment		
Other		

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What definitions will your organization rely on to measure outcomes (e.g., direct costs, indirect costs, hidden costs)?		
Which absence types will you track and measure (e.g., STD, LTD, WC, FMLA, leave of absence)?		
Are there particular surveys or research data against which it makes sense to routinely compare your organization?		
Is your organization able to employ some or all of the best practices noted above in measuring your integrated program?		