



**BOXERADVISORS**  
Translating Insights Into Action

**Translating Insights into Action: Generating  
Return-on Investment (ROI) From  
Organizational Development (OD) Solutions**

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## 1.0 Introduction

As most of our clients and many people I have known for years are aware, our team at Boxer Advisors is laser focused on helping our clients Translate Insights Into Action. What they aren't always certain of is exactly what we mean by this. Simply put, we believe the goal of every organizational development solution (i.e. -- training program, coaching assignment, or consulting engagement) should be to improve the performance of an organization by improving the capabilities of its people. At Boxer Advisors, we don't teach theory, we teach skills. In a nutshell, this immediate applicability is the basis for Translating Insights Into Action. And it is this applicability and translation that is necessary for organizations to realize a tangible Return on Investment (ROI) from organizational development solutions. The purpose of this white paper is to share strategies and solutions for Translating Insights Into Actions and how Boxer Advisors can assist your organization implement solutions that produce a real benefit.

## 2.0 Overview: Boxer Advisors

### Boxer Advisors Advantage

- Over 30 years of experience
- 80% repeat business
- Proven track record with Federal agencies and Fortune 1000 Companies
- 20+ year providing training, coaching and consulting solutions
- Over 100 off-the-self training programs
- Goal driven approach to service delivery
- Experts on evaluation and ROI to ensure program validation and value

Boxer Advisors, LLC (Boxer Advisors) is a certified small business engaged in providing leadership development, organizational development, and employee engagement training, coaching and services to Federal agencies and Fortune 1000 companies. We are a full-service firm that combines resources and expertise of more than 50 professional consultants, facilitators, and coaches. Our carefully selected partners and consultants have vast experience providing training and consulting services to the Federal government, including documented experience working within the Department of Health and Human Services (HHS), the Department of Energy (DOE) and Department of Commerce (DOC). Boxer Advisors President and Principal Consultant, Ken Boxer, brings over 30 years of experience to the practice. Mr. Boxer has worked with the U.S. Environmental Protection Agency, U.S. Department of Health and Human Services, U.S. Intelligence Community, U.S. Patent and Trademark Office, U.S. Senate, the World Bank, and other government clients. Prior to founding Boxer Advisors, Mr. Boxer was the founder and managing partner of Strategic Partners, Inc. where he regularly consulted with senior managers on the design and implementation of business plans and strategies to recruit, retain, and develop employees. With our cadre of consultants, facilitators, trainers, instructional designers, and coaches – Boxer Advisors has access to hundreds of subject matter experts (SME's) with extensive

experience in leadership development, employee engagement, and change management. We develop off-the-shelf training that participants find timely and relevant. Our team is comprised of experts in delivering training and coaching in ways that help participants quickly apply what they learned back on the job. Our team of professionals collaborates with our clients to deliver learning activities that produce tangible ROI. Lessons learned from previous engagements with government and corporate clients allow our team to anticipate and avoid problems experienced by others. Because of our teams' vast experiences, the learning curve is shorter and the ability to grasp organization-specific issues is strong, allowing us to quickly provide practical, tangible guidance that enables training participants to Translate Insights Into Action.

### 3.0 Challenges with Translating Insights into Action

In the classic book, “Transfer Of Training: Action-packed Strategies To Ensure High Payoff From Training Investment”; Mary Broad and John W. Newstrom identified the most important factors to delivering ANY training program:

1. Managers involvement before the training
2. Managers involvement after the training
3. Facilitators involvement before the training

	Before	During	After
Manager			
Participant			
Trainer			

Our experience at Boxer Advisors leads us to the belief that an effective training, coaching, or consulting implementation has a beginning (to launch the initiative) and an ending (to reinforce the learning). Our team is committed to developing people through skill-based learning solutions. We believe that among the major strengths of our firm is that we support training, coaching, and consulting that ensures the skills people learn are used on the job. Key factors that contribute to the likelihood a transfer of learning occurs include:

- Preparation and communication of the organizational development activity
- Orientation of our business teams
- Recommendation and implementation of follow-up reinforcement strategies

### 4.0 Organizational Development

Organizational development, often abbreviated as OD, improves existing processes, and creates new ones. The idea is to maximize the effectiveness, potential, and capacity of both people and organizations.

Boxer Advisors helps our clients with OD solutions to support the ongoing, systematic, long-range process of driving organizational effectiveness, solving problems, and improving individual and organizational performance.

**Our OD toolkit includes:**

- Strategic implementation of training to build core competencies, helping clients make effective use of their human Resources and providing focus on education and growth.

- Executive coaching, action learning coaching, team coaching, career coaching to improve individual and team performance
- Strategic change interventions such as: strategic planning, team building, competency development, organizational change consulting, end communication consulting, and benchmarking studies

## 5.0 Menu of Solutions

The “*secret sauce*” to our success in implementing organizational development solutions is that we help clients set the stage for learning and then reinforce our corporate tag line, helping “Translate Insights Into Action, by providing a menu of options to reinforce the learning from training, coaching, or consulting implementations. Some specific suggestions to help realize our clients realize a tangible ROI are outlined below:

### 1. Communications Consulting and Orientation of Our Team

To help address the three most important reasons underlying the success of any learning initiative, we leverage our experience to help leaders set the stage for learning and follow-up. We are experts at orienting teams so that our trainers and coaches have an understanding of the unique aspects of each individual client organization and culture.

Part of our Boxer Advisors team includes a group of communication experts experienced in developing a variety of communication tools to help our clients launch learning initiatives. we are informed by our experience that clients that communicate expectations for learning initiatives are more likely to realize a tangible ROI.

We have developed online learning portals, videos, speeches, posters, postcards, hosted events, hosted conferences, and leveraged process maps (visual pictures of strategy) to help our clients communicate to their organizations regarding learning initiatives. Two samples of process maps we've created for clients are included in appendix A.

One of the hallmarks of our approach is orienting our teams to perform work on behalf of our clients. We conduct regular meetings with our team of coaches, consultants, trainers, instructional designers, and technical producers. We have developed briefing documents and conducted briefing sessions for our team to better understand how to adapt coaching or training solutions that address our clients’ specific needs.

### 2. MovieComm Implementation

One way we help clients enhance the effectiveness of learning is to leverage our partnership with MovieComm to provide movie clips to communicate about learning initiatives and to improve the engagement of training. MovieComm ([www.moviecomm.com](http://www.moviecomm.com)) is the first company, in the history of Hollywood, to gain legal access to the major studio’s movie clip library. Clients have found it effective to use movie clips to help senior leaders communicate about learning, serve as a potential reinforcement to le, and /or use the movie clips in actual training sessions.



### 3. Executive

### Coaching

An overarching goal of Boxers Advisors is to ensure we improve our clients' processes and team skills. We bring a diverse pool of over forty (40) highly experienced executive and business coaches, most of whom have been certified by the International Coach Federation (ICF) and are involved with coach education and developing and influencing the standards of coaching practice being adopted industry wide. These individuals have worked together, both as a team and in support of sub-groups, on a variety of large-scale projects requiring both coaching and organizational development expertise.

### 4. Follow-up Application Webinar

We have designed and delivered a follow-up webinar for participants of all the training sessions conducted by Boxer Advisors. We request that participants of training come prepared to share specific stories of how they have applied the concepts from our workshop(s). Feedback provided by dozens of our clients has reported hundreds of thousands of dollars of ROI, as a direct result of people applying the concepts and tools taught in our workshop to help them improve communication, enhance processes, and methodologies shared for improving productivity.

### 5. Job AIDS for Leaders

Providing job aids during a training program or as a follow-up to a coaching engagement helps learners to retain information and recall it at the right time, which can be applied in the right manner when required. As a learning tool, an effective job aid helps participants recall and reinforce what has been taught during a training program or during a coaching session.

Boxer Advisors has created and has access to a library of effective job aids that include cheat sheets, memory joggers, one-pagers, performance support tools, direction lists, and much more. Essentially, anything designed to help people Translate Insights Into Action can be considered a job aid.

### 6. Book Review Session

For the past seven years, Boxer Advisors has hosted an executive book club. One powerful way to help reinforce learning from recently received training, is to conduct a one-session book review in a manner similar to what takes place in our book club. We do this by selecting one book that relates to majority of topics within the training we conduct. We can then either purchase the book for participants, or they can purchase it themselves; we then prepare and

share a brief summary ahead of time. During the session we then facilitate a discussion of key concepts from the selected book, how they relate to the training course(s). We wrap the session up by engaging participants in a two-way dialogue of approaches for applying some of the lessons of both the recent training and the book.

## 7. Menu of Articles

With our access to Harvard Business Review, INC. magazine, and other publications, we will recommend a series of articles with some questions for participants to ponder. This helps ensure participants reflect on the recently received training, helping to reinforce key workshop concepts and to continue the learning process.

## 8. Mentoring Calendar

Our Mentoring Practice Leader has developed an on-line mentoring calendar to help facilitate learning between mentors and mentees.

### The Mentoring Calendar

- ❖ Provides suggested monthly activities you can do together or alone
- ❖ Related to the competency that month
- ❖ Reinforces the virtual or in-person learning
- ❖ Provides ideas only, you can pick and choose what you want to do
- ❖ Activities do not have to be done on the exact date
- ❖ Eliminates the need to design activities





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## 9. Briefing for Senior Leaders

An interesting and useful option Boxer Advisors has provided for several other clients is to conduct a virtual briefing (60 minutes or less) for senior leaders within organizations. The purpose of this briefing is to provide specific suggestions of ways that these leaders can understand what was taught in the workshop or the reason for coaching, reinforce the learning, and strategize ways to connect the training or coaching to help accomplish critical organizational objectives.

## 10. Return-on-Investment Assessment (ROI)

What follows are examples of how we helped two clients realize an ROI from learning initiatives.

Organization	Organizational Challenges	Solution	Results
<b>Investment Management-National</b> 11,000 employees	Turnover costs of \$30 million directly affecting profitability Seeking to become “Employer of Choice”	Coaching and training for 1800 managers; Internal organization changes made to support organizational retention focus	Contributed to 22% decrease in turnover; Intellectual capital savings measured at \$5.1 million
<b>Financial Services</b> 10,000 employees	Employee attrition and concern about its impact on customer satisfaction and consequential revenues	Coaching and training to employees and managers, helping enhance their people development skills	\$1.5 million replacement cost savings; 147% return on investment

We have people on our team who are expert in working with Kirkpatrick level 1-4 assessments and who help our clients implement strategies to capture ROI data from learning events.

### 6.0 Proven ROI

As noted throughout this white paper, Boxer Advisors is committed to developing people through skill-based learning solutions. We do this through the design and implementation of customized training for client organizations and through a variety of solutions that reinforce the training received and help ensure the skills learned are brought back to the workplace and used on the job by training participants.

We know this process works and are sharing below several success stories from our coaching, training, and team-building initiatives.

#### 1) Leadership Training

With our access to over 100 off-the shelf training solutions and our deep experience providing leadership training, we are well qualified to be bring our experience and qualified professions to provide high quality training. Following is a demonstration of one of our many successes providing Leadership Training.

- ✓ **Centers for Medicare and Medicaid Services (CMS):** Our team designed and developed customized workshops based on core competencies, training over 300 headquarters employees and another 200 regional employees. In addition, our team trained

almost 1,000 managers in six core competencies, including written and oral communication, leading people, collaboration in partnering, leading change, results-driven problem solving, and continuous development. Training yielded a six-and-a-half-fold return on investment. In other words, for every dollar spent, the training yielded an average of \$6.50 in return.

## 2) Leadership Coaching

With our cadre of over forty executive coaches, Boxer Advisors has provided senior leadership/executive coaching for multiple clients. What follows is a sample of the successes achieved in one of our recent executive coaching projects.

✓ **U.S. Federal Aviation Administration (FAA), Air Traffic Organization (ATO):** FAA required executive coaching services to support the FAA ATO and participants in its ATO development programs. The program focused on building and enhancing the skills, knowledge, and insight of each of the participants during their development period as they prepare to support and further the mission and vision of the FAA. The focus for our coaching effort was thus to serve as a development process for the participants that was structured to build leadership capabilities necessary for supporting achievement of the FAA's short- and long-term organizational goals. Our coaches helped each participant reflect on, analyze, reframe, and problem-solve to discover new behaviors and patterns of increasing effectiveness. This leadership coaching program produced results that were observable, measurable, and commensurate with the performance requirements of the person being coached.

## 3) Organizational Development Consulting

The following example demonstrates our recent experience providing organizational development consulting services that provided our clients with immediate, tangible results.

✓ **Food & Drug Administration (FDA), Office of Public Information and Library Services (OPILS):** Boxer Advisors conducted team development meetings and workshops during the first year of this new organizational entity in conjunction with executive coaching. OPILS brought together four previously separate divisions under one new Office Director. We supported the success of this merger through quarterly meetings with executive and management teams and one all-hands meeting. In addition, and as part of this client engagement, our team also used a variety of tools including the Denison Leadership Culture Survey, strategic planning, Gallup Q12, the Leadership Spectrum Profile, and DiSC in conjunction with customized team-building activities. Use of these tools and activities was designed to support our client's successful development of a coherent vision, unified direction, and a set of clear and specific objectives for this newly formed unit.

## 7.0 Contracting Options



All coaching and training solutions described in this white paper can be purchased via a government approved credit card, completing a purchase order with Boxer Advisors, or contract using any of the following contract vehicles:

- Piggybacking on any open contracts that your agency has with another company
- GSA's HCaTS contract vehicle
- OPM USALearning Contract - one of our partner firms
- GSA FSS Contract vehicles
- Contract with 8(a) Firm - one of our teaming partners
- Contract with one of our woman-owned business teaming partners

## 8.0 Next Steps

Boxer Advisors proposes that as a follow-up to this white paper there are two appropriate next step actions:



**Meeting:** We suggest scheduling a follow-up meeting with Ken Boxer to discuss in more detail your organizational training requirements and our capabilities to meet those needs in FY 2023.



**Agreement:** During the past 25 years, our commitment to our Federal government clients is to be good stewards of federal dollars and make it as easy as possible to leverage our capabilities that have a measurable impact on individual and organizational performance. To move forward in supporting your training needs, there are several options and are open to a dialogue with you to discuss a plan that best accomplishes your objectives, budget, and timeframe.

## 9.0 Investment Summary

### \$10,000 Investment

Includes a bundle of some solutions outlined in this white paper to help clients Translate Insights Into Action from training, coaching, or consulting implementations. What follows are two scenarios that describe how you can combine your solutions to fit your current requirements or needs.

<b>Bundle #1</b>		
<b>Kickoff Meeting</b>	<b>In-meeting tasks:</b> -Introductions to client/Boxer team -Define organizational goals and objectives for session -Identify “hot button” topics if applicable -Develop high-level implementation plan <b>Post-meeting output:</b> -BA to provide synopsis of program objectives and implementation plan to client team	<b>\$600.00</b>
<b>Coaching</b>	3 Managers 2 Hours	<b>\$2,415.00</b>
<b>Moveicomm Pilot</b>		<b>\$500.00</b>
<b>90 Minute Webinar</b>		<b>\$1,725.00</b>
<b>Book Review and Articles</b>		<b>\$1,500.00</b>
		<b>Total: \$6,740.00</b>

<b>Bundle #2</b>		
<b>Kickoff Meeting</b>	<b>In-meeting tasks:</b> -Introductions to client/Boxer team -Define organizational goals and objectives for session -Identify “hot button” topics if applicable -Develop high-level implementation plan <b>Post-meeting output:</b> -BA to provide synopsis of program objectives and implementation plan to client team	<b>\$600.00</b>
<b>Job Aid</b>		<b>\$800.00</b>
<b>Executive Coaching</b>	2 Executives 2 Hours	<b>\$3,500.00</b>
<b>ROI Assessment</b>	3 Hours	<b>\$1,825.00</b>
<b>Mentoring Calendar</b>		<b>\$800.00</b>
<b>Senior Manager Briefing</b>	2 Managers	<b>\$2,000.00</b>
		<b>Total: \$9,525.00</b>



## Assumptions

**Implementation:** specific strategies will be refined during an initial sixty-minute virtual project planning session with the client.

**Meeting Action Items:** After the translating into action project planning meeting, we will send a follow up email to the client, confirming the statement of work and the level of effort for each solution

**Platform:** Any workshop will be delivered virtually. No Travel is required

### **Delivery of training includes:**

- Technical Producer and Virtual Platform: Our price includes a technical producer to help conduct each of the virtual training sessions, using Zoom for Gov. The instructor is then free to focus on classroom delivery only. The technical producer will ensure that the lobby and classrooms are set up beforehand and will help administer chats, polls, and breakout sessions, thereby increasing the level of engagement and improving the effectiveness of training.
- Instructor Orientation: Prior to the training, we conduct an onboarding briefing for our instructors, giving them an overview of client culture and priorities so that they are clear about all deliverables.
- Materials for up to 25 participants.

**Project Management:** One of our client services professionals will coordinate logistics with the point of contact to confirm deadlines for sending materials, deadline for pre-work, strategy for sending out the evaluation, etc.

## Appendix A: Sample Communication Tools

