



ROI MARKETING TOOL KIT

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STAGE	ACTION	TOOL
IDENTIFY THE PILLARS	Identify your organization's mission and vision and, marketing and sales overall plans. Aim to find the drivers of sustainability in three levels: economic, social, and environmental.	ELICITATION
SETTING OBJECTIVES	Define performance indicators, period of impact and success threshold in at least five dimensions of measurement. Align with the pillars.	OBJECTIVES TEMPLATE
RELATING FACTORS PLAN	Define cause-effect relationships between messages and interactions, and costs and revenues indicators. Isolate number of acts of purchase impacted by the project and influence of project on each act of purchase.	STATISTICAL ANALYSIS. INTERNAL CONSENSUS
MONETARY CONVERSION CRITERIA	Define value or profit per unit sold in cash. Use as the value baseline for attribution calculation	OWN INFORMATION SYSTEMS AND PROTOCOLS
DATA COLLECTION PLAN	Use objectives indicators and define period of influence of project, data source, and data collection method based on project's dynamics.	3WH FRAMEWORK
ROI SENSITIVITY ANALYSIS	Use validation and predictive models for an ROI Sensitivity Analysis.	ROI SENSITIVITY ANALYSIS. HISTORICAL DATA
DATA GATHERING	Collect all necessary information to verify marketing plan impacts on communications and on business.	DATA COLLECTION PLAN
RELATING	Use your attribution model as defined in Relating Factors. Link communication performance (project inputs) with business impact (project outputs).	QUANTITATIVE RESEARCH. CONJOINT. TRACEABILITY
CONVERTING TO MONEY	Establish the monetary value of communication impacts.	USE CONVERSION CRITERIA
ROI CALCULATION	Define the economic return of sales and marketing investments.	$\frac{\text{NET REVENUE}}{\text{INVESTMENT}} \times 100$
CONCLUSION & ANALYSIS	Generate business intelligence from each evaluation cycle. Set criteria for future planning.	OWN INFORMATION SYSTEMS (CRM, ERP, ETC.)