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Consulting effectiveness: Methodologies for assessing ROI from the implementation of new sales techniques and training programs in large enterprises

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Abstract

This article examines methodological approaches to assessing the return on investment (ROI) of consulting projects focused on implementing new sales techniques and training programs in large corporations. The objective of the study is to conduct a systematic analysis of existing ROI calculation models, identify their limitations, and develop a comprehensive approach that accounts for both direct financial outcomes and indirect strategic effects. The research methodology includes a critical review of academic literature on training effectiveness and organizational change evaluation, as well as an analysis of real-world cases from international practice. The findings demonstrate that traditional simplified ROI formulas often underestimate the overall value of such projects by neglecting factors related to employee retention, customer experience quality, and organizational learning. The practical significance of the article lies in the proposal of a multi-level evaluation framework that integrates quantitative and qualitative indicators at the operational, tactical, and strategic levels to substantiate investments in the development of the commercial function.

Keywords: Consulting ROI; Effectiveness Assessment; Sales Techniques; Sales Training; Large Enterprises; Evaluation Model; Organizational Change

1. Introduction

Large corporations regularly invest substantial resources in external consulting and internal training programs aimed at modernizing sales methodologies. However, the justification of the financial effectiveness of such initiatives often remains problematic, being reduced either to subjective participant satisfaction reports or to calculations that fail to capture the comprehensive impact on business performance. Increasing pressure on development budgets requires financial departments and commercial leaders to obtain clear and objective data on investment returns. The relevance of developing advanced ROI assessment methodologies is driven by the need to transform expenditures on training and consulting from cost items into managed investments with predictable returns.

The purpose of this article is to analyze existing approaches to ROI assessment, identify their methodological gaps as applied to sales technique projects, and synthesize an improved evaluation model. To achieve this objective, the study addresses the following tasks: examining the theoretical foundations of training effectiveness evaluation, systematizing practical methodologies, analyzing cases of their application in international companies, and formulating principles for comprehensive assessment.

2. Theoretical Context: The Evolution of Training Effectiveness Evaluation Models

The theoretical foundation for assessing ROI from training and organizational change initiatives is the hierarchical model developed by Donald Kirkpatrick in the 1950s, which has become a classical framework. The model consists of

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four levels: reaction, learning, behavior, and results. The first two levels measure participants' immediate reactions to training and the degree of knowledge acquisition; the third assesses the application of skills in the workplace; and the fourth focuses on final business outcomes. The transition from the third to the fourth level represents the greatest methodological challenge, as it requires isolating the impact of training from numerous other factors influencing business performance [2].

Further development of this concept led to the emergence of Jack Phillips' ROI model, which introduced a fifth level—the calculation of return on investment. This model proposes a rigorous process that includes data collection before and after the intervention, converting behavioral changes into monetary values, and comparing the resulting benefits with program costs. Critics of this approach note that it places excessive emphasis on financially measurable aspects while overlooking strategic and intangible benefits such as enhanced innovation capacity and the strengthening of corporate culture.

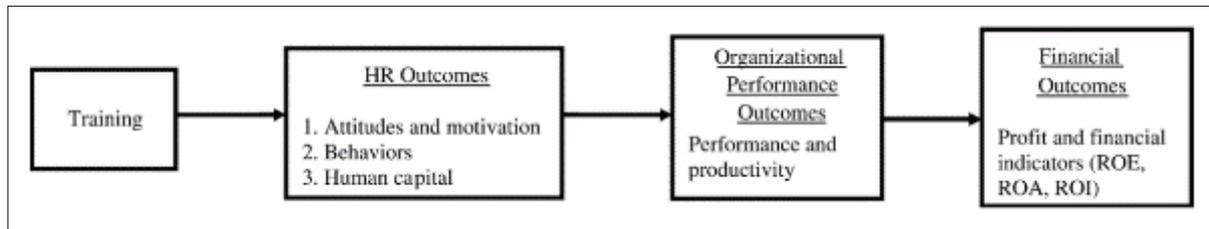


Figure 1 Evolution of training effectiveness evaluation models: Kirkpatrick's four levels and Phillips' ROI extension

Contemporary research in performance management emphasizes the importance of evaluating organizational change as a system rather than as a one-time event. From this perspective, the implementation of new sales techniques constitutes a process of organizational learning, the success of which depends on leadership support, the adaptation of methodologies to the company's specific context, and the integration of new practices into daily operations. Consequently, effectiveness assessment should consider not only final outcomes but also the factors that ensure the sustainability of change [3].

3. A comprehensive evaluation framework: a multi-level approach

To address the limitations outlined above, a multi-level evaluation framework is proposed, which examines the effectiveness of a consulting project through the lens of three interrelated levels: operational, tactical, and strategic.

The operational level focuses on direct, short-term, and measurable changes in managers' activities. Evaluation at this level includes metrics directly related to the application of new techniques, such as changes in the number of effective cold contacts, increases in conversion rates at specific stages of the sales funnel following the introduction of new scripts, and growth in the average number of repeat sales.

Data are collected through CRM systems, call recording analysis, and managers' reports. The financial effect is calculated by assigning a monetary value to a unit of improvement. For example, if a new technique increases the conversion rate from the presentation stage to the commercial proposal stage by 5%, and the average deal value is a certain amount, the potential revenue uplift can be estimated [4].

The tactical level assesses the impact on overall sales department performance and related functions over the medium term. This includes indicators such as sales cycle reduction, growth in average deal value, decreased turnover among commercial personnel, and increased key customer retention rates. At this level, counterfactual analysis methods are applied, such as comparing performance dynamics between a test group that has undergone training and a control group that continues to operate under previous methodologies. This approach allows the effect of the intervention to be at least partially isolated from external market factors [1].

The strategic level addresses long-term and intangible effects that are difficult to monetize but that contribute to sustainable competitive advantage. These include improvements in customer experience quality and Net Promoter Score (NPS), strengthening the company's reputation as a market expert, the development of an internal culture of learning and adaptability, and the creation of a repository of best practices. Evaluation at this level is based on regular customer surveys, benchmarking against competitors, and qualitative analysis of employee feedback.

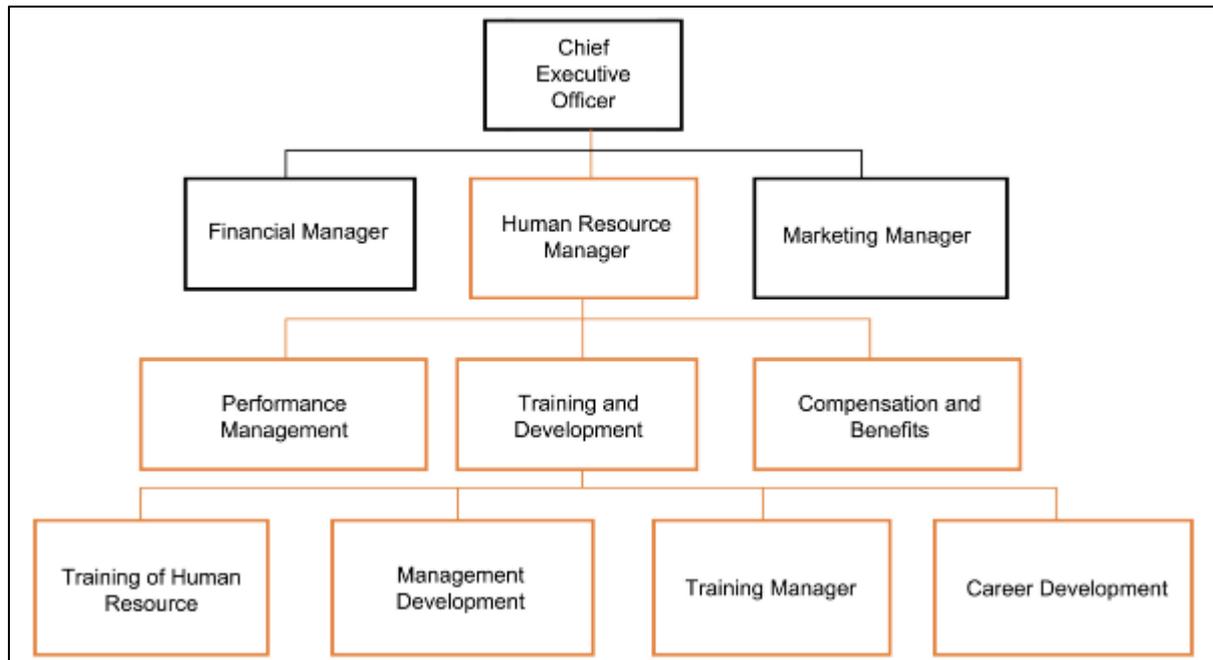


Figure 2 Multi-level ROI evaluation framework for sales techniques and training projects (operational, tactical, and strategic levels).

4. Synthesis and Recommendations for Implementing an Evaluation System

Based on the analysis of theory and practice, a set of recommendations can be formulated for designing an ROI evaluation system in large enterprises. The first step is to plan the evaluation in advance, already at the stage of designing a consulting project or training program. It is necessary to define which specific business metrics are expected to change, establish baseline values for these metrics prior to the intervention, and develop a data collection plan.

The second step involves selecting and combining data collection methods in line with the multi-level framework. This may include CRM data analysis, customer and employee surveys, focus groups, expert interviews with executives, and the use of control group methods where organizationally feasible.

The third step is calculation and interpretation. For financially measurable effects, standard ROI formulas are applied with mandatory inclusion of all direct and indirect costs, including temporary productivity losses. For strategic effects, qualitative descriptions are used and linked to the company's long-term objectives. It is important to present results not as a single ROI figure, but as a portfolio of evidence that includes financial calculations, data on behavioral change, and qualitative insights.

A key condition for success is the integration of the evaluation system into the company's overall performance management process and the involvement not only of the HR function, but also of commercial leaders, the Chief Financial Officer, and employees themselves. This transforms evaluation from a formal reporting exercise into a tool for organizational learning and informed decision-making regarding future investments in development [5].

5. Conclusion

The conducted research confirms that assessing the ROI of implementing new sales techniques and training programs in large enterprises requires moving beyond simplified financial formulas. The effectiveness of consulting projects in this domain manifests at operational, tactical, and strategic levels, all of which must be considered within a comprehensive evaluation model.

The main conclusion of the study is the necessity of applying a multi-level framework that integrates quantitative data on changes in business performance with qualitative analysis of transformations in employee behavior and organizational processes. Such a model enables more accurate isolation of the intervention effect, accounts for time lags, and captures strategic benefits that create long-term value.

Practical recommendations include mandatory advance planning of evaluation, the use of mixed data collection methods, ROI calculation for measurable effects combined with qualitative representation of strategic outcomes, and the institutionalization of the evaluation process as an integral part of the company's management system. The proposed approach is applicable across industries; however, specific metrics and methods should be adapted to the characteristics of the sales cycle, product portfolio, and organizational structure. Future research may focus on the development of standardized instruments for measuring behavioral change following training programs and on examining the impact of digital platforms on the accuracy and speed of data collection for ROI assessment.

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