THE FOUR SCORE SOLUTIONS

ROI PLAYBOOK:

Sharpen the Axe, Measure the Impact

A Four Score Solutions Field Guide
for Builders, Champions, and Decision-Makers
who want to prove value with precision.

"Give me six hours to chop down a tree, and I will spend the first four sharpening the axe."

— Abraham Lincoln

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Sharpen the Axe. Swing with Precision. Sustain the Forest.

FOUR SCORE SOLUTIONS

WHY THIS EXISTS

ROI gets thrown around in boardrooms like everyone understands it.
But for the people who actually fix problems, build systems, and see around corners, ROI can feel abstract.

I learned that the hard way.

Back in 2013, our engineering team ran everything out of Excel. It worked...until it didn't.
When our company invested hundreds of thousands into a big ERP system with a project management add-on, things got *slower*.
We didn't need more software.
We needed something scalable, something that actually made sense for how we worked.

That's when I stumbled across what felt like *Excel 2.0 in the cloud*: **Smartsheet**.
Within months, we turned our once-functional spreadsheets into scalable workflows.
But to get executives on board and to stop pouring money into a system that was holding us back. I had to do more than build.
I had to **calculate, communicate, and compound ROI** in a language they understood.

That process worked and this playbook was born from it.

This isn't theory. It's a field manual for every builder who knows their solution works but struggles to prove its value. Inside, you'll learn how to:

- Define what success really means
- Measure what matters most
- Communicate ROI with confidence
- And build momentum that compounds over time

Because sometimes, the thing that needs selling isn't the tool...it's your belief in it.

The Honest Abe Standard

At Four Score Solutions, we believe in what we call **The Honest Abe Standard** a commitment to being: **Transparent. Measurable. Accountable.**

That means:

- No made-up numbers.
- No guessing if something worked.
- No hiding when it didn't.

Every project we build is tracked like keeping score in a game, so we always know if it's really helping.

We follow three easy ideas:

1. **Sharpen the Axe:** *Slow down to think before you build.*
    a. First, figure out what's wrong, who's involved, and how it all works together.
2. **Swing with Precision:** *Build with purpose.*
    a. Every tool, chart, or task should clearly help the team save time or do better work.
3. **Sustain the Forest:** *Think about tomorrow.*
    a. As teams grow, their tools should grow too. Helping people use them (that's called adoption) keeps the value going strong.

These steps aren't just what we do, they're how we think. In today's fast world, being careful and clear is how you win.

What Is ROI?

(Return on Investment)

ROI means Return on Investment or simply: "*Did what we did make things better?*" It means understanding what changed, how much it helped, and why it matters; in numbers anyone can see.

It's like this: If you spend $1 and get $2 back, you doubled your money.
That's an ROI of 100%.

But ROI isn't only about money. It's also about saving time, making fewer mistakes, or helping more people use a tool. Those things have real value too; even if they don't show up on an invoice.

$$ROI = \frac{(ValueGained - InvestmentCost)}{InvestmentCost}$$

ROI helps leaders decide what's worth doing. It helps teams show that their work makes a real difference.

You'll learn six ways to measure ROI in this playbook:

- **Enablement**: Are people trained and ready?
- **Adoption**: Are they using it the right way?
- **Quantity**: Are we doing more with less?
- **Time**: Are things faster now?
- **Money**: Are we saving or earning more?
- **Risk/Quality:** Are we making fewer mistakes?

All six connect to one goal: proving your work *creates real value.*

What This Playbook Covers

If you've ever had to convince your boss to upgrade a system or try a new tool and didn't know how to show it was worth it, this playbook is for you.

Here's what's inside:

1. **Build Your Case:**
    a. Learn how to find the real problem, write down what's happening now, and figure out what it costs if you do nothing.
2. **Measure from All Sides:**
    a. We'll show you six ways to see value like time, money, and how well people use the tools.
3. **Tell the Story:**
    a. Use a simple checklist to show your wins in a way that leaders care about.
4. **Do the Math:**
    a. Use our free calculator to see your own results and tell your story with numbers that make sense.

This isn't about fancy charts. It's about showing clear proof that what you built really works.

Let's get your axe sharp and ready.

Identify the Pain

🔨 ***Principle: You Can't Measure What You Don't Define***

Before you can show what's getting better, you have to know what's wrong. That means finding the **pain:** the real reason work feels slow, messy, or expensive.

There are three kinds of pain to look for:

- **Operational Pain:** The work takes too long or has too many steps.
  - *(Example: People re-do the same thing again and again.)*
- **Financial Pain:** The company is losing money, time, or chances to save.
  - *(Example: Paying for two tools that do the same thing.)*
- **Strategic Pain:** The team doesn't have the right info to make good decisions.
  - *(Example: Reports are late or confusing.)*

💡 **Example:**
"Our team spends 6 hours a week collecting updates. That adds up to 48 hours a week or one whole person doing nothing but copy-paste."

🔨 **Axe Moment:**
"If you don't know where it hurts, you can't fix it
and you definitely can't prove it."

Set the Baseline

🔨 ***Principle: Start with What You Can Measure***

Once you've identified the pain, the next step is to measure your starting point; your baseline.

Your baseline is the "before" picture of your current process: how long things take, how much they cost, and how often they go wrong. It's the control group in your ROI story, the benchmark against which all improvements are proven.

Without a baseline, ROI becomes guesswork.
With one, it becomes undeniable.

Key Baseline Questions

- How many people are involved in this workflow?
- How much time or cost is associated with each cycle?
- How often does this process run (daily, weekly, monthly)?
- What's the error rate, rework rate, or delay frequency?

💡 **Pro Tip:**
When possible, calculate the cost of inaction. Ask: "If nothing changes, what's the long-term impact?"

That single question can shift an executive conversation from approval to urgency.

Set the Baseline

Three Steps to Establish Your Baseline

1. **Quantify Time and Effort**
    a. Measure how long each process takes.
    b. Track who's involved and how many hours they spend.
2. **Document Volume and Frequency**
    a. Count how often the activity occurs (per week, month, or quarter).
3. **Estimate Financial Impact**
    a. Multiply labor hours × hourly cost to find your current spend.

Metric	Current State	Desired State	Delta	Value of Change
Average approval cycle	6 days	2 days	-4 days	4 days × 20 requests × $300/day = $24,000/month
Manual reporting hours	120 hrs/month	30 hrs/month	-90 hrs	90 × $80/hr = $7,200/month
Data errors per report	12	2	-10	10 × $500 impact = $5,000/month

Monthly Value Realized: $36,200/month

Annualized ROI Potential: ~$434,400

🔨 **Axe Moment:**

"If you can't measure where you started,
you'll never convince anyone how far you've come."

Define the Desired Outcome

🔨 ***Principle: Clarity Creates Confidence***

Once you've identified pain and measured your baseline, define what success actually looks like.

Success should be:

- **Specific** — What's the target metric?
- **Measurable** — How will we know it improved?
- **Attributable** — Can we tie the change directly to the initiative?

🎯 Example Goal Statements

- "Reduce time-to-decision from 6 days to 2 days within 90 days."
- "Automate weekly reporting to save 90 hours per month."
- "Eliminate duplicate data entry across three departments."

Quick Framework:

- What is changing? (Process, system, or behavior)
- Who benefits? (Team, department, enterprise)
- By how much? (Percentage, hours, dollars)
- By when? (Timeline commitment)

💡 **Pro Tip:** Pair every target with a "why it matters" statement. "Faster approvals mean projects start sooner thus accelerating revenue by one quarter." When you connect improvement to business outcomes, your ROI story goes from interesting to irrefutable.

Define the Desired Outcome

Three Steps to Define Your Outcome

- **Translate Pain into Progress**
  - Revisit the problem you defined earlier.
  - Flip it into a success statement.
    - "Approvals that took 5 days now take 1." This becomes your ROI headline and the result you'll prove.

- **Set Measurable Targets**
  - Time saved, errors reduced, output increased, choose metrics that matter to your audience.
  - Example: "Reduce manual reporting by 75% within 90 days."

- **Define the Value of Success**
  - Connect results to outcomes that resonate with leadership.
  - Example: "This saves 12 hours per week, worth $46,800 annually."

🔨 **Axe Moment:**

"If you can't picture success clearly, no one else can either."

Quantify the Gap

(Cost of Doing Nothing)

🔨 ***Principle: The Cost of Doing Nothing Is Still a Cost***

Once you know where you are (the baseline) and where you want to go (the outcome), the next step is to define what happens if you don't act.

Every slow process, manual task, or missed update costs something, even if you can't see it right away. That's your **Cost of Doing Nothing.**

Three Steps to Quantify the Gap

1. **Calculate the Daily or Weekly Loss**
    a. Use your baseline data to measure recurring waste.
    b. Example: "We lose 12 hours weekly consolidating reports = $900 per week."
2. **Project It Over Time**
    a. Multiply that loss by months or quarters.
    b. "At $900 per week, that's $46,800 a year in lost productivity."
3. **Compare It to the Fix**
    a. Estimate your solution cost then show the payback.
    b. "A $25K automation eliminates $46K in waste; a 1.8× ROI within 12 months."

$$\text{ROI Multiple} = \frac{\text{Total Benefit}}{\text{Solution Cost}}$$

$$\text{ROI Multiple} = \frac{46{,}000}{25{,}000} = 1.84\times$$

Quantify the Gap

(Cost of Doing Nothing)

💡 **Pro Tip:**

Executives don't fund ideas...they fund avoided pain.

When you show how much the problem costs each month, your solution starts to feel urgent.

Category	Impact	Frequency	Annualized Cost
Delayed Approvals	4-day delay × $300/day	Weekly	$62,400
Manual Rework	10 hrs/week × $80/hr	Weekly	$41,600
Missed Opportunities	2 delayed launches × $15K	Quarterly	$120,000
Total Annual Cost			**$224,000**

🔨 **Axe Moment:**

"Doing nothing still costs something...you're just paying for it quietly."

Estimate the Return

At Four Score, we measure ROI through six lenses that reflect the full impact of modern work:

1. **Enablement — Readiness ROI**
    a. How equipped is your team to succeed?
    b. *Measured by:* % of trained users, # of certified admins, onboarding completion rate.
    c. *Insight:* The more capable your people, the faster your ROI compounds.
2. **Adoption — Utilization ROI**
    a. Are people actually using the tool and using it correctly?
    b. *Measured by:* Login frequency, active usage, automation adoption.
    c. *Insight:* Tools don't drive ROI; people do.
3. **Quantity — Output ROI**
    a. Are you doing more with the same resources?
    b. *Measured by:* Tasks completed, projects closed, deliverables produced.
    c. *Insight:* Volume without burnout is real productivity.
4. **Time — Efficiency ROI**
    a. How much faster are you completing the same work?
    b. *Measured by*: Cycle time, process duration, time-to-market.
    c. *Insight:* Every hour saved adds capacity to innovate.
5. **Money — Financial ROI**
    a. How much are you saving or earning because of this change?
    b. *Measured by:* Cost reduction, revenue acceleration, resource optimization.
    c. *Insight:* This is the number CFOs want, but it's not the only one that matters.
6. **Risk & Quality — Assurance ROI**
    a. Are you reducing errors, downtime, or compliance issues?
    b. *Measured by:* Defect rate, rework %, audit findings, incident reduction.
    c. *Insight:* Fewer mistakes mean fewer costs and greater trust.

🔨 **Axe Moment:**

"You don't need to be a math genius to prove ROI, just an honest one."

Enablement: Can People Use It?

🔨 ***Principle: Tools Don't Create Value — People Do.***

If people can't use it, it can't create ROI. Enablement is the groundwork, the process of ensuring every stakeholder has the access, knowledge, and confidence to participate. If people don't know how to use the tool, they can't make things better...even if the tool is amazing. That's why training, setup, and clear instructions matter.

Definition

Enablement measures the percentage of your target users who can use the solution effectively. It's the difference between "launched" and "ready."

Formula 📈

Enablement Rate (%) = Enabled Users ÷ Total Target Users × 100

Example:

You roll out a new intake process to 120 employees. 90 have access + training. Enablement Rate = 90 ÷ 120 = 75 %

Improving that to 95 % may seem small, but the compounding effect on downstream adoption can double your realized ROI.

💡 **Pro Tip:**

Enablement ROI compounds over time and each trained user reduces dependency, improves adoption, and amplifies overall system value.

Enablement: Can People Use It?

How to Measure Enablement ROI

1. **Training Completion Rate**
   - What % of users have completed onboarding or training?
   - Example: "82% of users completed onboarding within two weeks."
2. **Confidence and Competency Scores**
   - Use post-training surveys or assessments.
   - Example: "Average confidence score increased from 3.1 to 4.6."
3. **Time-to-Competency**
   - How long it takes a user to perform key tasks without support.
   - Example: "New users reach proficiency in 10 days, down from 25."
4. **Support Ticket Volume**
   - Declining help requests often signal rising enablement.
   - Example: "Weekly support requests dropped by 40%."

Metric	Before	After	Delta	Comment
Users enabled	75%	95%	20%	Access gaps closed
Training completion	60%	90%	30%	Hands-on sessions added
Support tickets	42	18	-57%	Knowledge improved

🔨 **Axe Moment:** "If they can't swing the axe, it doesn't matter how sharp it is."

Adoption: Are They Using It Correctly?

🔨 ***Principle: Adoption Turns Potential Into Proof.***

Enablement creates potential. Adoption turns that potential into performance. It's not enough to have users able to engage, they must want to, and do so in the right way.

Definition

Adoption means people are actually using what you built, not just knowing it exists. It's like having a great new car but never taking it out of the garage. You don't get the value until you drive it.

Here's how to see if people are really using your tool:

1. **Who's logging in?**
    a. How many people use it each week?
2. **How deeply are they using it?**
    a. Are they doing just one thing or using all the cool features?
3. **Is it growing?**
    a. Are more people using it this month than last?
4. **Is it making work easier?**
    a. Are fewer people stuck doing things by hand?

If people aren't using the tool yet, don't panic. Look to help the ones who are excited first. They'll show everyone else why it matters.

Adoption: Are They Using It Correctly?

Adoption ROI measures the activation of potential value. You can't realize return on investment until people use the tools consistently and confidently.

Formula 📈

Adoption Rate = (Active Users ÷ Enabled Users) × Utilization Score

Utilization Score = average percent of core features used consistently.

How to Measure Adoption ROI

1. **Active User Rate**
    a. % of total licensed users logging in weekly or monthly.
2. **Usage Depth**
    a. How much of the platform's capability is being used (features, automations, workflows).
3. **Engagement Over Time**
    a. Is usage growing, plateauing, or declining?
4. **Business Impact Indicators**
    a. Tie adoption to visible outcomes like fewer manual tasks, faster approvals, or higher collaboration.

Metric	Before	After	Delta	Comment
Active Users	80	110	30	Re-onboarding campaign ran
Utilization Score	65%	85%	20%	Feature training added
Effective Adoption Rate	52%	79%	27%	Performance doubled

🔨 **Axe Moment:** "The sharpest system is worthless if it never leaves the sheath."

Enablement + Adoption as the Baseline

🔨 ***Principle: Measure Before You Multiply***

ROI calculations built on weak adoption are fictional. That's why Enablement and Adoption form the baseline for every other ROI lens to come: Quantity, Time, Money, Risk, and Quality.

🪞 **Think of It Like This**

- Enablement = Capability
- Adoption = Behavior

Together, they determine how much of your potential ROI is even eligible to be realized.

ROI Readiness Formula 📈

ROI Readiness = Enablement Rate × Adoption Rate

If Enablement = 90 % and Adoption = 70 %, then only 63 % of your ROI potential is being captured.

You don't have an ROI problem...you have an engagement problem.

💡 **Practical Tip**

Before building dashboards or ROI models, run a "Readiness Audit."
Check licenses, training, logins, and usage analytics.
Fix those first — then measure impact.

🔨 **Axe Moment:** "Sharpen your people before you measure your productivity."

Quantity: Doing More With Less

🔨 *Principle: Volume Is the First Visible Win*

When leaders ask for ROI, what they often mean is output.
Quantity measures how much more your team can deliver once friction is removed: more tasks completed, more requests processed, and more projects delivered with the same headcount.

Definition
Quantity ROI measures the increase in throughput or output relative to a fixed set of resources.

Here's how to measure it:

1. **Count what's finished.**
    a. Are you completing more projects or tasks than before?
2. **See who's doing it.**
    a. Are people producing more without feeling overworked?
3. **Check for mistakes.**
    a. Doing more doesn't count if quality goes down.
4. **Compare to the past.**
    a. If you did 100 things before and now do 150 with the same effort... that's ROI.

💡 **Pro Tip:**
Quantity gains without burnout or rework are the strongest indicator of sustainable ROI.

Quantity: Doing More With Less

Once people are trained (**Enablement**) and actively using the system (**Adoption**), it's time to measure what they're producing...the output ROI.

Formula 📈

Quantity ROI = (New Output – Baseline Output) × Value per Output

How to Measure Quantity ROI

1. **Throughput Improvement**
   - Measure the number of tasks, projects, or deliverables completed in the same time frame.
   - Example: "Teams completed 34% more projects per quarter."
2. **Resource Efficiency**
   - Compare output per person or per dollar.
   - Example: "Output per FTE increased from $185K to $240K annually."
3. **Process Volume Expansion**
   - Quantify how automation or new workflows scale your capacity.
   - Example: "One workflow now processes 200 requests per week instead of 80."
4. **Error-Adjusted Output**
   - Track how increased volume affects quality (shouldn't decline).
   - Example: "Output rose 40% while error rates dropped 15%."

Quantity: Doing More With Less

Metric	Before	After	Δ	Value
Requests Processed	200	320	120	$18,000/month
Rework Rate	14%	4%	-10%	10 % × 320 × $150 = $4,800 saved
Cycle Efficiency	68%	92%	24%	Faster completion times

Total Monthly Value Realized: $22,800

Annualized ROI: ~$273,600

💡 **Tip**

Track Quantity ROI early as it's the most visible win you can communicate to executives. It shows teams are doing more with the same people, tools, and hours.

🔨 **Axe Moment:**

"Real efficiency means more done, less wasted; not more stress."

Time: Reclaim Your Hours

🔨 ***Principle: Time Saved Is Momentum Gained***

Every minute reclaimed from manual work is a minute redirected toward impact. Time ROI captures the measurable savings from automation, standardization, or process optimization.

The Time Lens asks one simple question:
Are we getting things done faster than before?

Here's how to see if you're saving time:

1. **Check how long things take.**
    a. Did a task that took 5 days now take 1?
2. **See how fast decisions happen.**
    a. Are reports or approvals ready sooner?
3. **Add up the hours saved.**
    a. Example: "We saved 120 hours each month → that's $9,000 worth of time."
4. **Show how you used that time.**
    a. Example: "We used the time we saved to start two new projects."

💡 **Pro Tip:**
Always link time saved to what's done with that time.
"We didn't just save 10 hours, we used those hours to build three new client dashboards."

Time: Reclaim Your Hours

The Time Lens measures how much faster your organization delivers the same results without sacrificing quality. It's the most visible, relatable, and financially measurable ROI metric. Every hour saved becomes an hour available for higher-value work: innovation, strategy, or scaling.

That's why time savings often serve as the **anchor metric** in ROI calculations across consulting and enterprise models.

Definition

Time ROI calculates the total value of hours saved multiplied by the loaded hourly rate of those performing the work.

Formula 📈

Time ROI = (Hours Saved × Loaded Hourly Rate) × Frequency

Example

Ten analysts each save 3 hours per week automating reports.
Their average loaded rate is $65/hour.
Time ROI = (10 × 3 × $65) × 52 weeks = **$101,400 annualized.**

💡 **Tip**

To make Time ROI stick with executives, translate hours saved into strategic reinvestment value:

- "This gives us capacity to take on 15 more projects."
- "We gained the equivalent of one FTE's workload."
- "We reclaimed 20 % of our team's week."

Time: Reclaim Your Hours

How to Measure Time ROI

1. **Cycle Time Reduction**
   - How much faster does a process complete from start to finish?
   - Example: "Approvals now take 1 day instead of 5 — an 80% reduction."
2. **Time-to-Decision / Time-to-Value**
   - How long from data input to actionable outcome?
   - Example: "Reports generated in 2 hours instead of 2 days."
3. **Effort Hours Saved**
   - Total hours reduced for recurring work.
   - Example: "Saved 120 labor hours per month — equivalent to $9,000."
4. **Time Redeployed**
   - Where those saved hours go.
   - Example: "Freed 15% of team capacity for innovation projects."

Metric	Before	After	Δ	Value
Weekly Reporting Time	5 hrs/analyst	2 hrs/analyst	-3 hrs	3 × 10 × $65 × 52 = $101,400
Meeting Prep Time	4 hrs	1.5 hrs	-2.5 hrs	$84,500 annualized
Rework Hours	60/mo	20/mo	-40 hrs	$31,200 annualized

🔨 **Axe Moment:** "Saving time is great — using it well is better."

Money: Follow the Dollars

🔨 ***Principle: The Sharpest Metric Is the One That Hits the Ledger***

Every organization speaks in the language of dollars; not dashboards. Money ROI converts your improvements in Quantity and Time into tangible financial results. It shows leadership what efficiency is *worth*.

The Money Lens is about how your work helps the company's wallet.

When you save time or avoid mistakes, you're saving money. When you help things happen faster or better, you're earning money.

Here's how to see it clearly:

1. **Saving money:**
    a. You spend less.
    b. Example: "We cut $90,000 in extra work."
2. **Avoiding costs:**
    a. You stop small problems before they become big ones.
    b. Example: "We caught errors before they cost $25,000."
3. **Making money:**
    a. You open doors for new business or faster sales.
    b. Example: "We finished early and sold 3 more projects."
4. **Payback time:**
    a. How long it takes for the savings to cover what you spent.
    b. Example: "We got our money back in 6 months."

Money: Follow the Dollars

The Money Lens converts improvements into financial outcomes, the currency of decision-making. It's not just about savings; it's about value creation.

Formula 📈

Money ROI = (Revenue Gain + Cost Avoidance + Cost Reduction) – Investment

How to Measure Money ROI

1. **Cost Savings (Efficiency ROI)**
   - Reduction in operating expenses or labor hours.
   - Example: "Automation reduced manual processing costs by $90,000 per year."
2. **Cost Avoidance (Risk ROI)**
   - Prevented spend or errors that would have cost money.
   - Example: "Improved data validation prevented $25,000 in duplicate payments."
3. **Revenue Enablement (Growth ROI)**
   - Increased capacity or time-to-market that drives top-line gains.
   - Example: "Faster approvals helped launch 3 new campaigns worth $150,000."
4. **Return Multiple / Payback Period**
   - How fast you recover your investment.
   - Example: "$50K investment paid back in 6 months — a 2× ROI."

💡 **Pro Tip:** Executives trust financial proxies more than assumptions. Use simple math: Hours saved × hourly rate = annualized value.

Money: Follow the Dollars

Metric	Before	After	Δ	Value
Labor Cost	$540K	$420K	-$120K	$120K saved
Vendor Spend	$180K	$130K	-$50K	$50K avoided
Revenue Recognition Lag	45 days	30 days	-15 days	$150K advanced
Total ROI (12 mo)				**$280K net**

💡 Tip

Tie your ROI to specific financial categories:

- **Cost Avoidance:** preventing new spend (licenses, contractors).
- **Cost Reduction:** lowering current spend (manual effort, errors).
- **Revenue Gain:** accelerating cash flow or throughput.

Example

Automation saves $200K in labor costs, avoids $50K in vendor spend, and accelerates revenue by $150K.

Implementation cost = $120K.

Money ROI = ($200K + $50K + $150K) – $120K = $280K net ROI.

🔨 Axe Moment:

"Efficiency unspoken is just savings unnoticed. Track the dollars or lose the proof."

Risk: Reduce Variance, Increase Confidence

🔨 ***Principle: The Only Thing More Expensive Than Doing It Right Is Doing It Twice.***

Reducing risk doesn't just prevent loss, it creates predictability.
Risk ROI measures the reduction in errors, compliance breaches, and unplanned costs, translating consistency into confidence.

The Risk & Quality Lens is about doing things right and not wasting time fixing mistakes later.

When work has fewer errors, it saves money, time, and stress.
When things go wrong less often, people trust the system more.

Here's how to measure it:

1. **Fewer mistakes:**
    a. Are there fewer errors or do-overs?
2. **Better compliance:**
    a. Are audits or reviews showing fewer issues?
3. **More reliable work:**
    a. Does the system run smoothly without help?
4. **Happier users:**
    a. Are people or customers more satisfied?

Example:
"We cut errors from 8% to 2% and saved 200 hours fixing mistakes."

Risk: Reduce Variance, Increase Confidence

How to Measure Risk & Quality ROI

1. **Error Reduction**
   - Track defects, rework, or incident counts before and after implementation.
   - Example: "Error rate dropped from 8% to 2%, saving 200 staff hours annually."
2. **Compliance and Audit Findings**
   - Fewer audit flags or nonconformities = lower exposure.
   - Example: "Audit exceptions decreased from 12 to 4 in six months."
3. **Process Reliability**
   - How often processes run without manual correction.
   - Example: "Automation success rate improved from 85% to 98%."
4. **Customer or Stakeholder Satisfaction**
   - Track quality perception — internal or external.
   - Example: "Satisfaction score rose from 7.8 to 9.2 post-implementation."

Definition

Risk ROI quantifies the dollar value of avoided incidents, improved compliance, or reduced variance caused by better systems and oversight.

Formula 📈

$$ROSI = \frac{(RiskReductionValue - InvestmentCost)}{InvestmentCost}$$

Risk: Reduce Variance, Increase Confidence

💡 Example

A quality team reduced data errors from 20 per quarter to 5.
Each error costs roughly $1,000 in rework or penalties.
Risk ROI = (15 × $1,000) = **$15,000 per quarter ($60K annually).**

Metric	Before	After	Δ	Annual Value
Compliance Incidents	8	2	-6	$12K avoided
Reporting Errors	20	5	-15	$60K avoided
Unplanned Overtime	140 hrs/mo	80 hrs/mo	-60 hrs	$57.6K saved
Total Annual Risk ROI				**$129.6K**

💡 Tip

When quantifying risk reduction, convert probabilities to dollars:
If the chance of an $80K mistake drops from 20% to 5%, the expected risk exposure fell by $12K and that's measurable ROI.

🔨 Axe Moment:

"What you prevent is often more powerful than what you produce."

Quality: Raise the Standard

🔨 ***Principle: Excellence Scales When It's Measured***

Quality ROI is the twin of Risk ROI but where Risk looks backward (prevention), Quality looks forward (performance).

It measures improvements in accuracy, consistency, and stakeholder satisfaction that create enduring competitive advantage.

Definition

Quality ROI captures the financial and reputational value of higher standards: fewer errors, faster approvals, and greater stakeholder trust.

Formula 📈

Quality ROI = (Improvement % × Total Process Value)

💡 **Example**

A reporting process valued at $250K/year improved accuracy by 20 %.
Quality ROI = 0.20 × $250K = **$50K annual value.**

Quality: Raise the Standard

Metric	Before	After	Δ	Value
Report Accuracy	78%	96%	18%	$45K/year
Stakeholder Satisfaction	82%	94%	12%	$18K/year
Project Rework Rate	15%	5%	-10%	$27K/year
Total Annual Quality ROI				**$90K/year**

💡 Tip

Frame Quality ROI in executive language:

- "Fewer escalations and missed SLAs."
- "Higher first-time approval rates."
- "Improved decision confidence."

🔨 **Axe Moment:** "Quality isn't expensive — inconsistency is."

Six Lenses at a Glance

🔨 ***Principle: See Value from Every Angle.***

The Six Lenses of ROI let you evaluate progress beyond "time saved."
Each lens measures a different kind of gain that together, reveals your **true value realization.**

Lens	Question It Answers	What to Measure	Why It Matters	Example Metric / Outcome
Enablement	Can people use it?	Training rate, certification completion, first-use time	If people aren't enabled, nothing else moves.	95 % of target users trained within 2 weeks → faster ramp-up
Adoption	Are they using it daily?	Active usage, frequency, feature utilization	Adoption multiplies ROI (usage × value).	85 % weekly active users → +25 % data accuracy
Quantity	Are we doing more with less?	Output volume per FTE or per workflow	Reveals capacity gains without added headcount.	50 % more requests processed per month
Time	Are we faster?	Cycle time, approval speed, turnaround time	Converts time savings into financial value.	Avg task time cut from 10 → 4 hrs (6 hrs saved × $75 = $450 each)
Money	Are we saving or earning more?	Cost avoidance, cost reduction, new revenue	Translates efficiency into dollars leaders see.	$120 K annual savings from automation
Risk & Quality	Are we reducing mistakes and rework?	Error rate, defects, audit findings	Every error avoided protects margin and trust.	70 % fewer errors → $60 K cost avoidance + faster compliance

🔨 **Axe Moment:**

"When you measure from every angle, your story becomes undeniable."

From Data to Story

🔨 ***Principle: ROI Only Matters If It's Understood***

You've defined the pain, set the baseline, mapped the outcomes, measured the ROI, and viewed it through six lenses. Now it's time to bring it all together and to tell one cohesive story that connects data to decisions.

Here's how to tell it:

1. **Start with the problem.**
    a. What was broken?
    b. "We lost 5 days waiting for approvals."
2. **Say what you fixed.**
    a. "We built an automated system."
3. **Show what changed.**
    a. Use numbers or facts from the 6 lenses.
    b. "Faster by 80 %, fewer mistakes, saved $90K."
4. **Explain why it matters.**
    a. "Now we finish projects 3 weeks sooner; that means more money and less stress."

Example

"We automated project intake, cutting approval time from six days to two. That freed 120 hours per month (equivalent of $110K per year) and doubled throughput without hiring anyone."

That's not a metric dump. It's a micro-story: concise, visual, and memorable.

From Data to Story

The Four-Part ROI Story Framework

1. **Problem → Proof of Pain**
   - Open with the pain that started it all.
   - Example: "Manual updates took 5 days and created $200K in delays."
2. **Solution→ What We Did**
   - Show the change you made.
   - Example: "We automated approvals and centralized dashboards."
3. **Result → What Changed**
   - Use the Six ROI Lenses to frame results.
     - Enablement ↑ — 82 % trained within 2 weeks
     - Adoption ↑ — 87 % active users
     - Quantity ↑ — 43 % more output
     - Time ↓ — Cycle time cut by 80 %
     - Money ↑ — $90K annual savings
     - Risk ↓ — Errors down 75 %
4. **Meaning → Why It Matters**
   - Tie results to bigger business outcomes.
   - Example: "We accelerated product launches by 3 weeks — adding $450K in new revenue potential."

💡 **Pro Tip:**

End every ROI presentation with "What's next?"

Show how this success can scale with new departments, new automations, new ROI.

Framework: The ROI Narrative

When it's time to tell the full story of your work.
Think of it like a short movie: there's a problem, something changes, and things get better.

Step	Description	Example
Problem	Define the friction.	"Our approvals took six days."
Solution	Explain what changed.	"We automated intake and built visibility dashboards."
Result	Quantify the impact.	"Now it's two days, saving 120 hours/month."
Meaning	Tie it to business goals.	"That's one full FTE of capacity and faster delivery."

Once you can tell your ROI story with confidence, the final step is to scale it by turning one success into a system of continuous improvement.

🔨 **Axe Moment:** "ROI that can't be retold won't be remembered."

Compound the Return

🔨 ***Principle: ROI Grows When You Reinforce What Works.***

The most successful organizations don't just measure ROI, they multiply it. They turn one proof of value into a cycle of continuous improvement, adoption, and reinvestment.

Compounding ROI happens when insights from one project strengthen the next. Every automation, every process optimization, every user success adds up and starts creating a flywheel of performance and trust.

Three Levers of Compounded ROI

1. **Reinvest the Gains**
   - Use saved time or money to fund the next improvement.
   - Example: "We reinvested $25K in savings into new automation training."
2. **Scale the Success**
   - Expand proven solutions to new teams or departments.
   - Example: "The pilot's 4-week turnaround became the enterprise standard."
3. **Institutionalize the Measurement**
   - Make ROI tracking part of governance; not a one-off exercise.
   - Example: "ROI dashboards refresh quarterly to guide funding priorities."

🔨 **Axe Moment:** "ROI keeps growing when learning keeps going."

The Executive Lens

🔨 *Principle: Speak in the Currency of Decision-Makers*

Executives care less about "number of workflows built" and more about "time-to-value, cost efficiency, and strategic capacity."

If you want to get buy-in, connect your ROI to outcomes that accelerate their priorities.

🎯 Executive Triggers

Trigger	What They Hear	Example ROI Statement
Speed	"Can we deliver faster?"	"We reduced cycle time by 65% — same team, more output."
Scalability	"Can we grow without adding headcount?"	"Through automation, we absorbed 40% more work with no new hires."
Visibility	"Can we see what's happening in real time?"	"Dashboards eliminated 20 status meetings per month."
Risk	"Can we trust the numbers?"	"Data integrity improved from 82% to 97% accuracy."
ROI	"Is it worth it?"	"Each dollar invested returned $4.10 in measurable value."

💡 Tip

Every executive asks: "If we invest more, will we get more?"
Build your narrative to make that answer obvious.

The Executive Lens

The Four Metrics Executives Listen To

1. **Payback Period** - How fast do we get our money back?
    - Example: "Our $60K investment paid back in 7 months."

$$\text{Payback Period} = \frac{\text{Total Investment}}{\text{Annual Return}}$$

2. **ROI Percentage (Return on Investment)** - How much value did we create compared to what we spent?
    - Example: "$120K benefit on $60K cost = 100% ROI."

$$ROI = \frac{(NetBenefit - Investment)}{Investment} \times 100$$

3. **TCO (Total Cost of Ownership)** - What does it really cost to maintain this over time?
    - Include software licenses, support, training, and change management.
    - Example: "Our total 3-year cost is $180K with expected value of $480K."

4. **Value Realization Curve** - When does ROI actually appear, and how does it grow?
    - Visualize your ROI timeline (ramp-up → adoption → full return).
    - Example: "We achieved 60% of projected value by Month 6 and 100% by Month 12."

🔨 **Axe Moment:** "If you can explain ROI in one slide, you're speaking executive."

The Communication Cadence

🔨 ***Principle: What Gets Shared, Scales.***

ROI communication shouldn't be a one-time report. Treat it as an operating rhythm; a drumbeat that reinforces progress, drives engagement, and secures future investment. Here's how to do that:

1. **Every week:**
    a. Share quick wins — what got faster, easier, or cheaper.
2. **Every month:**
    a. Tell a short story about what improved and how it helped.
3. **Every quarter:**
    a. Show the big picture — how much time or money was saved overall.

🕒 **Recommended Cadence**

Frequency	Audience	Focus
Weekly	Core team	Share visible wins ("2 workflows automated," "10 hrs saved").
Monthly	Stakeholders	Report ROI metrics, adoption trends, and before/after visuals.
Quarterly	Executives	Summarize measurable business outcomes; showcase compounding ROI.

💡 **Pro Tip:**

Visibility drives behavior. Make ROI part of your operating rhythm, not just your year-end reporting.

🔨 **Axe Moment:** "When you share wins, you spark more wins."

The Adoption Flywheel

🔨 ***Principle: Every System Lives or Dies by Its Users.***

If people don't use what you build, it stops helping. That's why adoption is like a flywheel, when you keep it spinning, everything gets easier and faster.

The Flywheel Framework

1. **Enable → Build Confidence**
    a. Equip users with the skills, context, and tools they need.
    b. Example: "New users trained in 2 hours using guided walkthroughs."
    c. Metric: % of users trained or certified.
2. **Adopt → Build Habits**
    a. Reinforce daily use through real outcomes and visible results.
    b. Example: "Team adoption reached 85% within 60 days."
    c. Metric: Active usage rate or feature adoption %.
3. **Evolve → Build Mastery**
    a. Continuously improve processes and share best practices.
    b. Example: "Quarterly innovation sprints led to 3 new automations."
    c. Metric: Number of enhancements or internal innovations implemented.
4. **Measure → Build Proof**
    a. Feed results back into ROI tracking dashboards.
    b. Example: "Usage data validated a 3× time savings YoY."
    c. Metric: ROI growth rate or recurring savings value.

🔨 **Axe Moment:**

"The best tools don't change companies; people who use them do."

Sharpen Your Business Case

🔨 ***Principle: Simplicity Drives Action***

You've identified the pain, measured your baselines, and calculated your ROI. Now, before you communicate upward or expand your rollout, confirm you've earned the right to call it a business case.

Use this checklist before any system change, workflow redesign, or new investment. It ensures that every initiative is **Transparent. Measurable. Accountable.** If you can check all 7 boxes, you're ready for approval.

✅ The Honest Abe ROI Readiness Checklist

Step	Objective	Key Questions	Proof Points
1. Identify the Pain	Define what's broken or inefficient.	What's slowing us down or costing us time?	Quantified delay, backlog, or cost of inefficiency.
2. Set the Baseline	Establish a before-state.	What does "normal" look like today?	Measured throughput, hours, or dollars before change.
3. Define the Desired Outcome	Visualize success.	What will success look and feel like?	Target metrics for speed, accuracy, or satisfaction.
4. Quantify the Gap	Frame the "cost of doing nothing."	What's the price of staying the same?	Estimated losses or missed opportunities.
5. Measure the Return (6 Lenses)	Evaluate performance from all angles.	How do we define ROI across Enablement, Adoption, Quantity, Time, Money, and Risk/Quality?	Calculated gains using consistent lens-based metrics.
6. Communicate the Story	Turn data into persuasion.	How do we show the impact in human and business terms?	Before/after charts, quotes, ROI percentages, payback.
7. Sustain and Scale	Protect and expand your results.	How do we maintain performance over time?	Ongoing adoption rates, reinvestment cycles, governance reviews.

ROI Proof Summary Sheet

🔨 *Principle: Proof Outlasts Hype*

This page serves as a one-page summary sheet to capture your quantified ROI results — perfect for internal sharing or executive presentations.

📈 ROI Summary Snapshot

ROI Lens	Metric or Formula	Your Results
Enablement	Enabled ÷ Target Users	_____ %
Adoption	(Active ÷ Enabled) × Utilization	_____ %
Quantity	(New Output − Baseline) × Value per Output	$ _____
Time	(Hours Saved × Rate) × Frequency	$ _____
Money	(Revenue + Cost Avoidance + Cost Reduction) − Investment	$ _____
Risk & Quality	(Incidents Avoided × Cost) + (Improvement % × Process Value)	$ _____

Total Annual ROI: $ _____

Payback Period: _____ months

ROI Multiple: _____ x

$$\text{Total ROI (\%)} = \frac{\text{Total Benefit} - \text{Investment}}{\text{Investment}} \times 100$$

$$\text{Payback Period (months)} = \frac{\text{Investment}}{\text{Monthly Benefit}}$$

$$\text{ROI Multiple} = \frac{\text{Total Benefit}}{\text{Investment}}$$

💡 **Tip:** Highlight one or two standout metrics. Don't drown your audience in decimals — clarity beats complexity.

🔨 **Axe Moment:** "Show it simply, and they'll believe it quickly."

ROI Proof Summary Sheet

📈 ROI Summary Snapshot - Example (Realistic Mid-Size Project)

ROI Lens	Metric or Formula	Your Results
Enablement	Enabled ÷ Target Users **(+40 pts (↑ training coverage))**	90%
Adoption	(Active ÷ Enabled) × Utilization **(+28 pts (↑ weekly usage))**	78%
Quantity	(New Output − Baseline) × Value per Output **(+50% gain = +$60K)**	$ 60K
Time	(Hours Saved × Rate) × Frequency **(2,000 hrs × $75 = $150K)**	$ 150K
Money	(Revenue + Cost Avoidance + Cost Reduction) − Investment **(+$90K annual savings)**	$ 90K
Risk & Quality	(Incidents Avoided × Cost) + (Improvement % × Process Value) **(+$30K from error reduction)**	$ 30K

Total Annual ROI: $ 330K
Total Investment: $ 110K
Payback Period: 4 months
ROI Multiple: 3x

$$\text{Total ROI (\%)} = \frac{\text{Total Benefit} - \text{Investment}}{\text{Investment}} \times 100$$

$$\text{Payback Period (months)} = \frac{\text{Investment}}{\text{Monthly Benefit}}$$

$$\text{ROI Multiple} = \frac{\text{Total Benefit}}{\text{Investment}}$$

This page helps you turn your numbers into proof.

1. Write down what you gained in each area: time, money, quality, adoption, etc.
2. Add them up.
3. Subtract what you spent.
4. Divide that by what you spent to get your ROI %.

If you spent $10,000 and saved $30,000, your ROI is 200 %.
If you got that money back in 3 months, your payback is 3 months.

YOUR ROI CALCULATOR & NEXT STEPS

🔨 ***Principle: Transparent. Measurable. Accountable.***

Pillar	What It Means	How We Deliver It
Transparent	Clear goals, open data, visible results	Dashboards, baselines, and ROI templates shared openly
Measurable	Every claim backed by data	Six ROI lenses tracked continuously
Accountable	Success tied to adoption and enablement	Quarterly ROI reviews and value realization reports

Every number in this playbook leads to one truth: ROI is not just a calculation...it's a commitment. This final page connects you to Four Score's Interactive ROI Calculator: a digital tool that transforms your metrics into a visual ROI layout.

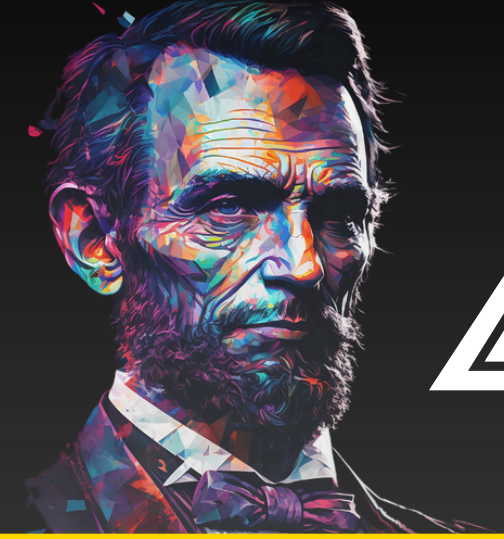
📲 Scan to Access the Digital ROI Calculator

Calculate your ROI instantly. Save your results. Share with leadership.

💬 Final Words

"The measure of success isn't how many tools you have, it's how many people use them to their full potential."

— Michael Tirrell, Founder, Four Score Solutions



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LET'S CHAT

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