

## ROI Clarity Worksheet

### *Measure What Truly Matters*

**“Return on investment is not just profit – it’s purposeful, sustainable growth that creates value for all.”**

#### **Why Use This Worksheet?**

- ✓ Define what ROI truly means for your business
- ✓ Identify the areas with highest potential returns
- ✓ Align investments with strategic and purpose-driven outcomes

✦ **How to Use:** Take 20–30 minutes to reflect and fill each section below.

### **Your ROI Clarity Framework**

#### **1. Define ROI For You**

*(Beyond financial returns, what does ROI mean for your organization – growth, impact, time, culture, wellbeing?)*

#### **2. Current Investments**

*(List your top 3–5 ongoing projects, offers, or systems investments.)*

- 1.
- 2.
- 3.

#### **3. Expected Outcomes**

*(What specific results or improvements do you expect from each investment? Be as measurable as possible.)*

#### **4. Value vs. Cost**

*(For each investment, note down: Is the expected value worth the cost in time, money, or energy?)*

## 5. Quick Wins vs. Long-Term Gains

*(Which investments will deliver quick ROI? Which build strategic, long-term value?)*

✔ Quick Wins:

✔ Long-Term Gains:

## 6. Risks & Barriers

*(What might hinder the ROI of these investments?)*

## 7. Strategic Action

*(What is ONE next step to maximize ROI in each area?)*

✔ **Final Reflection** :*“If we realigned all investments with our core purpose today, where would we get the highest sustainable ROI?”*

## Next Steps

Use this worksheet:

✔ During budgeting and planning

✔ Before approving new projects

✔ In team or board strategy sessions

✔ To evaluate ongoing initiatives

## Need Deeper ROI Clarity?

Book a **Strategy Sprint** to align your investments with purpose, performance, and sustainable profit.

👉 [Book Your Strategy Sprint Now]

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