



HUMAN RESOURCE
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Beyond ROI:

A Guide to Value-Based
Strategic Decision-Making



Ask yourself this: When your organization evaluates potentially divisive issues, what criteria are you using?

While return on investment is important, it is not the only prism through which to make decisions. Without further information on company history and feedback from stakeholder groups, performance numbers will lack essential context.

While the strategic process differs in every organization, here is a basic framework to assess organizational values—a lens through which companies can (and should) evaluate strategic initiatives.

“The most effective leadership teams make decisions based on a deep understanding of what their core constituencies value. When they take action, they can do so with confidence. If your organization doesn’t have that kind of confidence—if you are guessing—then there is work to do.”

*DR. AMY DUFRANE
CEO OF HRCI*

1. Identify Your Existing Programs

Start by taking a simple inventory of what your company is doing across all departments. You don’t have to evaluate yet, just make a list. While this may seem simple, it is frequently more complicated than anticipated. Programs often develop over the course of years and may have had multiple iterations. Processes and procedures are sometimes undocumented. Assumptions often go unquestioned. Take time to conduct an objective exercise to understand how your company currently operates.

2. Survey Your Employees and Customers

Your workforce and customer base are primary and often vocal assets that must be heard and understood through ongoing two-way communication. Continuous feedback loops can identify when situations and feelings change, providing valuable cues as to when and how your business landscape is evolving. Town halls, professionally facilitated focus groups, and other personal forums can also provide valuable qualitative data. Note differences of opinion based on demographics such as age, education, race, gender, and geographic location.

3. Establish a Multi-Level Working Group

While values can be communicated, and even modeled, by the C-suite and board of directors, successful strategic plans ultimately involve the entire organization. HR professionals, as well as those in product, marketing, sales, and leadership, must join with representative employees, union leaders, suppliers, and investors throughout the value chain to undertake a holistic planning process. Hearing all major constituencies is vital to aligning around shared values.

4. Evaluate and Adjust Existing Programs

Once you have a working understanding of what your core constituencies value and how that relates to your business, you can begin evaluating the programs and procedures you previously cataloged. This evaluation can now extend not only to basic efficacy, but also to how programs and procedures serve the goals collectively valued by your communities.

This more comprehensive evaluation will provide strong indicators on what (if any) actions need taken, supporting more targeted and productive conversations. “The conversation should be less about fear and politics and more about where the people who drive your organization want to steer it,” Dufrane said.

5. Assess Government Affairs Engagement

Companies allocate different levels of resources to government affairs. Regardless of where your organization is on this spectrum, it is a good time to monitor what is happening at the state and federal levels in areas pertinent to decisions you must make.

This is especially true for companies that transact with the government. If you have an in-house government affairs team, ensure they are monitoring meaningful action in the executive branch and reporting this intelligence company-wide. If you don’t have an in-house team, consider when and if you would need to retain an outside lobbying shop or legal counsel.

At a minimum, keep in close touch with your trade organizations so you are quickly informed about relevant changes. If you must make operational adjustments or engage policymakers, you will need adequate time.

6. Tell Your Story

If your organization does not create its own strategic narrative, others may do it for you. It is essential to make informed decisions about how your organization communicates its values and actions, both internally and externally. HR can work in tandem with communications teams to determine how to communicate and implement strategic change in a way that reinforces your company’s respect for and its commitment to organizational and stakeholder values.



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