

[INSERT COMPANY LOGO]

## Company Name Learning Management System Business Case

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## Executive Summary

- It is recommended to write this section last
- Follow rough paragraph by paragraph guide as follows:
  - State the business need
  - Describe what the problem is, succinctly
  - Explain your solution to the problem (as an introductory statement)
- Overall sell the vision, make it come to life with a story

## Contextual Information

- There are two parts to the contextual information:
  1. There are a number of stakeholders involved in making procurement decisions, gaining consensus can be tricky with competing priorities – learn more [here](#)
  2. These stakeholders may have little to no context, especially if there first-time gaining exposure to procuring a learning management system

Structurally paragraphs can follow this format:

1. What is the common thread for value that all stakeholders get with the company investing in the recommended LMS. If for a specific use case, say customer training, then state the specific benefits as it relates to the use case
  2. What were the specific business problems or commercial opportunities that were identified in advance of the decision that a LMS was the correct solution. To secure investment it is best practice to link this to corporate priorities and business goals
  3. Discuss the steps that have been taken leading to the decision to submit this business case, and if this above stated problems have tried to be solved and didn't work, explain here why that happened
- In this section don't yet mention solution and the specific LMS selected. That comes in the following sections.

## LMS Project Decision & Definition

- Link the stated business problems or commercial opportunities above to the decision of a LMS to solve
- Define a LMS so that the stakeholders are clear (a lesson learnt here is make no assumptions on depth of stakeholder knowledge. Example paragraph to use:

*A learning management system today is a cloud hosted software used by organisations to enable their learning and development priorities. Functionality of an LMS includes the ability to administrate, host, document, track, report and deliver on training and L&D programs and initiatives.*

## Business Requirements for the LMS

- In this section you can add the business requirements that were put together at the beginning of the procurement process. Example of business requirements could be:
  - The business needed a preferred supplier who was already established with over 100 customers
  - Minimum security standards of ISO27001 equivalent
  - A project implementation of no longer than 2 months
  - A specific go live date of no later than Month/Year
  - Billing on a per active user basis
  - The supplier would offer a contract of X length with X flexibility
  - We found the supplier to be easy to collaborate with during the review phase and can imagine ourselves successfully collaborating with them to deliver L&D outcomes
  - The supplier runs the implementation internally versus outsourcing to a 3<sup>rd</sup> party – this reduces cost and risk to us
  - The supplier was not pushy, salesy and only looking for the sale, they supported us in our procurement steps
  - High-level ROI (detailed financial analysis to follow)

Use case examples could include:

- Established company and LMS
- Multiple tenancies with dual purposes
- Ability to deliver complex courses with multiple delivery formats
- Ability to sell courses and take payments through LMS
- High quality user experience
- Strong reporting functionality
- API transfer of data

## Option presentation and evaluation

- For this section you link to the requirements stated above, and demonstrate that you have done a scan of the learning management system market to make an informed decision
- You can state that the global LMS market has over [800 providers](#), hence the need to scale down based on your specific requirements
- The next stage for whittling down can be shown by comparing potential providers on a comparison site such as Capterra:  
<https://www.capterra.com.au/directory/30020/learning-management-system/software> - making comment that this is high-level detail
- Here you can show the short-list you created, and name those companies listed here and an overview of their offering and why they were shortlisted. A quick way we have established to get this information after the fact is to go to the vendors website and copy and paste part of their About Us webpage
- The main thing to demonstrate here is continuity with the requirements section above, for this section you are able to keep it at a high level

## Presentation of preferred choice

- This is the section where you go into the detail of your selected LMS provider
- Include product name and company
- Then bullet point through the requirements stated above, establishing how they were the standout provider
- For the purpose of a business case, it is ok to simply say how they meet the requirement
- If you have a good relationship with your chosen LMS point of contact, it's ok to send this section to them to complete

## Strategic alignment

- Given a learning management system affects many stakeholders it falls under the banner of an enterprise solution, with this means linking to the company strategy is important
- Typically, a CEO sets 4-5 critical priorities for the financial year, then within that each department of the company has goals aligned with delivering these critical priorities, and as such comes strategic alignment. The key here is to understand where you link within either a critical priority or a goal that enables a critical priority



## Risks

- Be clear in this business case document of the risks involved, and any associated dependencies
- Don't be tempted to omit this section in hope it'll bolster your business case, it will have the opposite effect
- Key here is to show you have identified the risks, evaluated the likelihood and if appropriate any stage gates to catch them from happening

## LMS implementation plan and resource investment

- As with the presentation of the preferred supplier section, this is also an opportunity to leverage the relationship you have with the chosen LMS supplier to complete the section
- Key bit of information from an LMS implementation plan to consider sharing are:
  - Timelines
  - Transition management
  - Data migration
  - Change management – this is important to highlight to ensure LMS utilisation
  - Resources required from internal teams (IT, marketing etc)
  - Average implementation time from the LMS supplier with recent customers
  - UAT

## Financial Analysis

	Cost Item/Category	Year One / Implementation	Subsequent years
<b><i>Insert number of users here</i></b>	LMS annual license		
Additional user cost	Additional user cost (per person)		
Additional Costs	Mobile application		
Additional Costs	Additional plug-ins and tools annual license and maintenance costs		
Additional Costs	Test/development server/environment		
Additional Costs	Staging server/environment		
Additional Costs	Hosting or SaaS service		
Additional Costs	Additional storage per terabyte		
Additional Costs	Additional bandwidth per mbps		
Additional Costs	Dedicated support contact or hosting manager		
Additional Costs	<ul style="list-style-type: none"> <li>Data integration costs</li> </ul>		
<b>Additional Implementation and ongoing costs</b>	<b>Subtotal</b>		
Ongoing Support and Training	Service desk		
Ongoing Support and Training	User Training		
Ongoing Support and Training	Training materials		
<b>Ongoing Support and Training</b>	<b>Subtotal</b>		
Other i.e., if there are any other typical charges not listed above. e.g., source code escrow			
Other			
Other			
<b>Other</b>	<b>Subtotal</b>		
	<b>Grand Total</b>		
	<b>Tax</b>		
	<b>Grand Total (incl. tax)</b>		





## Authorisations

- Explicitly state the approvals needed, by whom and whether they can in order or can be gained concurrently
- The approvers are likely involved in this process, so you can put in a place a timeline for approvals based on internal process and the targeted go-live date