

Business Case for a Results-Driving Learning Solution in [Company]

Submission date:

<<DATE>>

Submitted by:

<<NAME>>

<<JOB TITLE>>

<<EMAIL>>



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This document is designed to help you build your own business case for a learning solution. It contains example content for each section that you can adjust to suit your organization. Once you've removed the sections that don't apply to your business case delete all of the blue, italicized text from the document before sharing it with your CFO.

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Executive summary

In this section, it is important to outline the challenges your business is facing and where you want to be. We've included an example below but you'll find a more comprehensive list of common challenges [here](#).

[company's name]'s current learning solution is not user-friendly. It does not have the automation features needed for delivering engaging content. Reporting functionalities are poor as well as integration with our current tech stack.

[company's name] presents a solution that centralizes content and makes it easy to deliver learning that impacts what matters: performance, retention, and growth. The best option is [LearnUpon LMS](#).

If adopted, the solution is projected to allow us to *[example answers below]*.

- **Improve customer retention** by delivering industry-leading training to 90,000+ professionals [\[1\]](#).
- **Be compliance audit ready**, resulting in a cost savings of £100K [\[2\]](#).
- **Increase training efficiencies and reduce costs**, resulting in 52K course completions across 1,500+employees in 1 year [\[3\]](#).
- **Scale our growth** by reducing support calls by 89% and cost savings of \$200K [\[4\]](#).

Cost overview

Populate these fields to provide a clear overview of projected costs from the beginning. Our ROI calculator will help you [here](#).

Total implementation cost	
Annual operating costs	
ROI calculation	

Project background

Here, you should outline your reasons for investigating learning solutions – whether you're moving from in-person training or from another solution provider. Just amend the details to suit your organization.

Having implemented learning solutions in the past, we've found these solutions fragmented and inefficient. With a number of scattered providers, each department, region and business area gets something different.

The L&D team are looking to move the organization away from training spreadsheets and emails for a solution where all learning, whether it be self-directed, mandatory, upskilling, or development, would be managed, delivered, tracked, and accessed in one central hub.

Or

The L&D team are looking to move the organization away from our current LMS as it is not meeting business needs. We need a solution where all learning, whether it be self-directed, mandatory, upskilling, or development, can be managed, delivered, tracked, and accessed in one central hub.

We've listed some examples to choose from. Select and amend the challenges that apply to your organization.

Here's a breakdown of our key challenges:

- Poor employee onboarding.
- Not seen as a place for professional growth.
- Inability to track compliance.
- Falling short of retention targets/customer churn.
- Too much time spent responding to basic, repetitive requests.
- Burnt out support staff dealing with issues that could be resolved with better customer education.

- High level of employee turnover, losing key talent.
- No formalized training/Ineffective approach.
- Multiple general purpose systems and no centralized location or approach.
- Partners not achieving agreed sales targets.

Solution proposal

We propose adopting LearnUpon to improve our processes, update our technology and bring return on investment to L&D.

By championing simple, learner-centric experiences and results-focused support, LearnUpon makes it easy for businesses to deliver learning that impacts what matters: performance, retention, and growth.

LearnUpon LMS is a central hub, where you can easily create and manage learning programs for every audience, and importantly, deliver them in an engaging, learner-friendly way. What's more, at every stage, their people are by your side, helping you build learning strategies that drive real business results.

Why LearnUpon

LearnUpon started with a belief: learning should be simple, and its impact should be big. And today, LearnUpon is helping businesses around the world do just that, whether through training for employees, customers, partners, or multiple audiences.

- Having opportunities to learn and grow is ranked as the number 1 factor that defines an exceptional work environment in 2022. This was ranked number 9 in 2019 — a significant change in only three years (LinkedIn Workplace Learning Report 2022 & 2019).
- Organizations report a 6.2% increase in organizational bottom-line revenue through customer education (Forrester, 2019) Beyond revenue, there are also

benefits in support cost savings, improved scalability, and increased customer satisfaction.

“I was prepared to fight for an LMS, but the investment versus the business impact of LearnUpon is outsized. We’re seeing real results. Two years ago, I had to do the storytelling to paint that picture, and now we’re reaping the rewards.”



Jaclyn Anku | Partner Education at Gusto

“We’re a lean team and LearnUpon makes our job easier so we can focus on improving our programs, achieving our KPIs, and ultimately making Sonic the best place to work and shop.”



Douglas Bryant | VP of Talent Management, Training and Recruiting at Sonic Automotive

Switching software

Use this section if you're switching from another provider.

Switching from our current provider to LearnUpon will include implementing the software and giving our team time to complete LearnUpon's onboarding process and learn the new system. We'll also have to update our policies to include LearnUpon.

Once the software has been purchased and the agreement has been signed, LearnUpon will support us with implementation and training.

Before switching, we'll need to consider the notice period for our existing system, which is X days. This means we'll be required to export all the data we need to transfer from our existing system within this timeframe. LearnUpon can support migrating learner details if necessary.

After that, LearnUpon provides full onboarding support and training to get the solution up and running.

Benefits

These benefits will be true for most organizations using LearnUpon. Use what is relevant and if you can think of any others, just add them in!

Improve customer retention

- Onboard and educate customers so they stick around for the long-term.
- Maximize product adoption by showing off the value.
- Make learning easy, while also increasing engagement and staying top of mind with customers.
- Empower customers with engaging and enjoyable learning that improves their experience and perception of our brand.
- Create a customer academy to establish our brand as a leader in the minds of customers.
- Increase retention and reduce customer churn by turning customers into experts and advocates.

Scale support

- Reduce support tickets to allow customer-facing teams to focus on more strategic initiatives.
- Provide a positive onboarding experience for new customers from day one with quality training programs.

- Track and report on customer progress/performance metrics to understand where customers face barriers to learning and adoption.
- Use courses to cover the essentials so customers and support teams can spend more time focusing on what matters.
- Create a more knowledgeable and self-supporting customer base.

Retain employees

- Make new employees' experiences a positive one with training designed to teach them about our culture, processes, policies, and more.
- Reduce time-to-performance for employees by getting them up to speed faster so they can feel productive and engaged from day one.
- Deliver required learning to new employees, while enabling them to self select other training that interests them.
- Save valuable time by automating training workflows, tracking learning and engagement, and getting a full picture of employee data.

Fill skill and development gaps

- Attract, nurture, and keep top talent by giving people the tools they need to excel.
- Encourage employees to develop skills that help them be happier, more inspired, and more productive at work.
- Give employees another reason to stick around long-term by providing ways for them to level up their skills and learn new ones.

- Do more with less, better understand employees' skills and put them to use in the most efficient way.

Be compliance audit ready

- Ensure compliance is seamlessly woven into the foundation of every employee's role.
- Automatically enroll, test, and certify employees so we are always audit ready.
- Easily make sure that the right people are receiving the right safety, compliance, and ethics training at the right time.

Increase training efficiencies and reduce costs

- Scale operations through customized, engaging learning experiences by delivering training globally.
- Enhance customer service and reduce compliance risks by providing online support resources, tracking training goals, and providing online support.
- Improve the effectiveness of those connected to our organization as well as offering better value to customers.
- Maximize the ROI of training by removing the knowledge gap between internal and external users .
- Deliver in-person training online, avoiding manual processes, travel restrictions and costs.

Grow the business through learning

- Ease the onboarding process by making each individual across the organization feel welcome and informed.
- Lower demand for support teams.
- Online training will support brand growth, leading to a higher revenue.
- Offering multi-audience training can help strengthen our brand and spread awareness.
- Empower our audiences with an easy self-service system and pre-defined learning journey with minimal input.

The investment

[Contact LearnUpon for a demo and detailed pricing information \(the figures below are examples only\).](#)

Based on [your company name]'s needs, we propose the below costs on a <<1 year or 3 year>> commitment.

The annual investment includes all maintenance and eligible product upgrades (based on price plan) throughout the duration of the contract and is subject to a <<X%>> increase at the start of any renewal term.

PREMIUM	
USAGE <ul style="list-style-type: none"> → 300 active users → 1 portal 	
PLATFORM FEATURES <ul style="list-style-type: none"> → Custom branding → Reporting → Instructor-led training → Assignments → eCommerce → Gamification → SSO / API → Multiple languages → White labeling → Integrations: webinar, Zapier, Salesforce 	\$23,988 ANNUAL COST
ENTERPRISE SUCCESS <ul style="list-style-type: none"> → Designated Customer Success Manager 	
PREMIUM IMPLEMENTATION <ul style="list-style-type: none"> → Designated Implementation Consultant → Tailored implementation plan 	\$6,000 ONE-TIME FEE

Pricing Model

LearnUpon offers a standard SaaS subscription model, consisting of several price bands. Each price band includes a set number of active users and one or more portals, which allow you to configure your training differently for each of your target audiences – like having multiple LMSs controlled in one place.

What plan you select will also depend on your feature and support requirements. As you consider our [proposed pricing](#), we encourage you to review what is available in the context of your organization's needs

Return on investment

In this section, you need to outline where improvement in one area results in improvements in others, ultimately increasing the bottom line.

[Our ROI calculator will help you here.](#) You'll find templates for several different training types, including sales training and employee onboarding.

Example: Customer onboarding		
Primary goal	Reduce customer onboarding time by 40%	\$510,000 in estimated annual revenue
Metric to measure	Pre learning solution implementation	Post learning solution implementation
Customer onboarding by number of days	50 days	30 days
Training Results		
Convert % to revenue number	40%	\$510,000
Learning solution cost	\$186,000	
ROI calculation	\$510,000 - \$186,000	
Return on investment from learning solution	\$324,000	

Initial project plan

The final stage of your business case outlines how you'll implement your proposed learning solution into your organization. We've outlined LearnUpon's implementation process and some team suggestions.

Implementation

If approved to move forward, LearnUpon's approach to implementation encompasses tasks in six categories:

CATEGORY	TASKS
DISCOVER	<ul style="list-style-type: none"> ✓ Share goals and context ✓ Define use case(s) ✓ Define launch needs ✓ Assemble teams and resources ✓ Review integration needs and options
PREPARE	<ul style="list-style-type: none"> ✓ Train administrators ✓ Develop a detailed project plan ✓ Plan migrations
BUILD	<ul style="list-style-type: none"> ✓ Build your portal(s) ✓ Add users and content ✓ Migrate training history ✓ Configure other features
TEST	<ul style="list-style-type: none"> ✓ Validate your portal build(s)
PROMOTE	<ul style="list-style-type: none"> ✓ Assess project footprint ✓ Create awareness ✓ Instill desire ✓ Impart knowledge ✓ Assess and enable ability ✓ Provide constructive reinforcement

LAUNCH

- ✓ Pre-launch evaluation
 - ✓ Post-implementation review
-

Project governance

Use names and job titles and state what role each person is playing in the project.

Example:

- Executive sponsor: Chandler Bing, COO
- Business owner: Rachel Green, People Operations
- Project manager: Monica Geller, Senior Project Manager
- IT Lead: Joey Tribbiani, Lead Programmer
- Implementation consultant: TBD
- Super user/tester: Phoebe Buffay, Operations Analyst

If you would like to have further discussions about scope or would like more details, [please reach out to a member of the team here.](#)

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- [1] [How The American Council on Exercise certifies 90,000+ professionals through LearnUpon](#)
 - [2] [How Hillarys delivers award-winning service by training its people with LearnUpon](#)
 - [3] [Gusto is building impactful opportunities for its people and partners with LearnUpon](#)
 - [4] [ChargePoint reduced partner support calls by 89%](#)