Building the Business Case for Learning

A 5-Step Process to Get Your Stakeholders On Board

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I. Getting business leaders on board with learning

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Are you trying to make the case for Learning & Development at your company?

Whether you're a full–time L&D professional, a leader responsible for developing your department, or just an advocate for learning at your organization, it is important to understand how to make a strong business case for employee learning and development.

How can L&D and People leaders become effective trusted advisors? Making a compelling business case for learning is one way to gain mindshare of key executives at your organization.
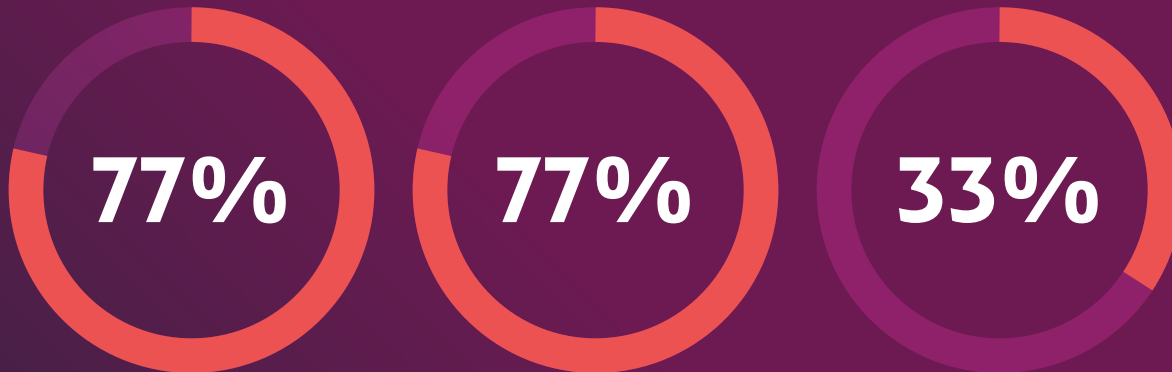
90% of organizations report that the L&D leader's role is expanding to become a trusted advisor to executives[1]

90%

Source: ATD

1. ATD, "Chief Talent Development Officers: Driving Strategy and Performance," 2017.

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Traditionally, it's been difficult to measure the ROI of learning, especially in ways that make sense to CEOs and executives.

77%

77%

33%

77% of CEOs see the availability of skills as the biggest threat to their business[2]

77% of L&D leaders see more demand to demonstrate the business impact[3]

Yet only 33% of business leaders think the L&D function impacts business outcomes[3]

Challenge: proving the value of learning

Learning also takes time which can be perceived as taking employees away from their day jobs. Learning advocates know that the time dedicated to learning is well spent, but it can be challenging to convince stakeholders. Why should sales managers, for example, divert their team's work hours off of the sales floor and towards learning something new? L&D and People leaders will need to prove the value of learning.

Source: PwC and CEB

2. PwC, 20th CEO Survey, "The Talent Challenge: Harnessing the Power of Human Skills in the Machine Age."
3. CEB, "What CEOS Want (and Aren't Getting) from Their L&D Organization," 2016.

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The ROI of learning framework

To help L&D and People leaders make the business case for learning, here's a ROI of learning framework with four key components to focus your efforts—cost savings, productivity, internal buy-in, and employee engagement. In this guide, we'll highlight one of the key components—how L&D leaders and any advocate of learning can gain buy-in from internal stakeholders at your organization.

COST SAVINGS

PRODUCTIVITY

ENGAGEMENT

INTERNAL BUY-IN

ROI OF LEARNING

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In this guide, you'll learn:

1

A 5-step process to sell learning to your executive/ leadership team, managers, and other key stakeholders

2

Tips and real-life examples of ways current HR and L&D leaders have successfully made the business case for learning

3

Advice on what works—and what doesn't

4

A checklist to begin implementing this framework at your organization

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II.

5-step process
for getting your
stakeholders
on board

5 steps to gain internal buy-in at your organization

Here is a 5-step process to get stakeholders–from your C-suite to managers–on board with learning.

1	Act like a consultancy–your employees' ROI is your ROI
2	Get crystal clear on your company's decision-making process
3	Assemble your dream team
4	Speak in numbers—build your business case
5	Pick good use cases and easy wins

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1

Act like a consultancy— your employees' ROI is your ROI

If you want the support of leaders and decision-makers in your organization, it's important to act like a business partner and adopt a consultancy mindset. To do this, you will need to know the intricacies of different departments, understand their quarterly goals, and help them address their key challenges through your L&D efforts. This perspective should frame everything that you do.

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Understand the needs of the department or company

Your programs should respond to real needs and challenges of the business. Gather information by meeting face to face with stakeholders, reviewing engagement survey results, and talking with employees.

Be reactive rather than prescriptive

Build upon what you've learned from your research. Consider how your programs react to the needs of the individuals and teams they're serving, rather than prescribing something that you think employees should do.

It's about you, not me

"I lead with a consultancy approach—I really sell the fact that it's not about my L&D department and me trying to build training or how proud I am of the things I built. It's about how your team rocks and how our team helps you get there."

Brent Boeckman

CEO and Founder of Rising Strengths Consulting and formerly Global Head of L&D at Malwarebytes.

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Don't start with your bells and whistles; start with stakeholders' concerns

Ask department heads and managers—where do they need support when it comes to skills development? What are their goals for the near- and long-term future?

For example, if a business leader says they need 3 more mid-level managers within 18 months, that's a need you might be able to address by offering management training to develop internal managers for these roles.

It's not about your bells and whistles

"Start with the core pain points in skill sets that decision-makers need and want and then work back from there. Don't start with your bells and whistles. Start with their concerns and map your learning & development programs to those needs."

Cara Brennan Allamano

Senior Vice President of Human Resources at Udemy

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Connect your L&D programs to your employees' ROI

Frame your programs in terms of the specific return on investment (ROI) your employees want to achieve. For example, if your sales team's goal is to increase sales deals by 10%, then that's your ROI. This is one of the most effective ways to gain the support of stakeholders—by demonstrating how invested you are in the success of their team.

Depending on the team you're working with, your ROI could be increased customer satisfaction scores, shortened time to competency, fewer client complaints, faster time to market, or fewer errors at work. Here are two examples of what this might look like in practice.

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CASE EXAMPLE

Customer service team goal

Drive up customer satisfaction scores

[24]7.ai

Read more:
How L&D helped a customer service firm prepare for digital transformation

Soft skills training helped increase customer service performance

[24]7.ai used L&D to upskill staff when they reinvented their call center into an artificial intelligence–based customer experience. Now their AI platform handles common requests and more complex questions are forwarded to human agents. The L&D team helped prepare the workforce for this change by offering training in key soft skills like Positive Psychology and Emotional Intelligence. They're measuring the ROI of this initiative by tracking feedback from supervisors 30 days after training and improvement in customer satisfaction scores.

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CASE EXAMPLE

Engineering team goal

Decrease time to productivity and bring new products to market faster

Appian

Watch webinar:
Creating a growth mindset: Preparing for the future of work

Technical training decreased onboarding time

At Appian, a platform-as-a-service startup and one of the hottest IPOs of 2017, the software development team was growing quickly. To decrease time to productivity for new hires, Appian created an onboarding program that combined online courses and junior developers as coaches to teach their new hires key programming skills. Onboarding time decreased to only 2–3 months, enabling Appian's developer team to focus on bringing software products to market faster.

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2

Get crystal clear on your company's decision-making process

Before you embark on building the case for learning internally and rolling out a new learning program or technology, you should first fully understand your company's decision-making process. This will help you anticipate potential roadblocks and ensure key stakeholders are involved at the right time.

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Understand how major decisions are made at your company

No purchasing decision is made by a single person—take time to understand who needs to get involved and when. Is your organization centralized or decentralized? Do you have offices around the world that will need to be involved? Spend time speaking with other managers and leaders to learn how purchasing decisions and program rollouts have worked in the past.

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Align priorities across departments

When you're making a decision for a company–wide learning platform or program, there will always be multiple groups involved, each with their own priorities for budget, timing, and results. Reaching alignment on priorities and budget across all these departments is essential.

Finance

Legal

HR

IT

Business units

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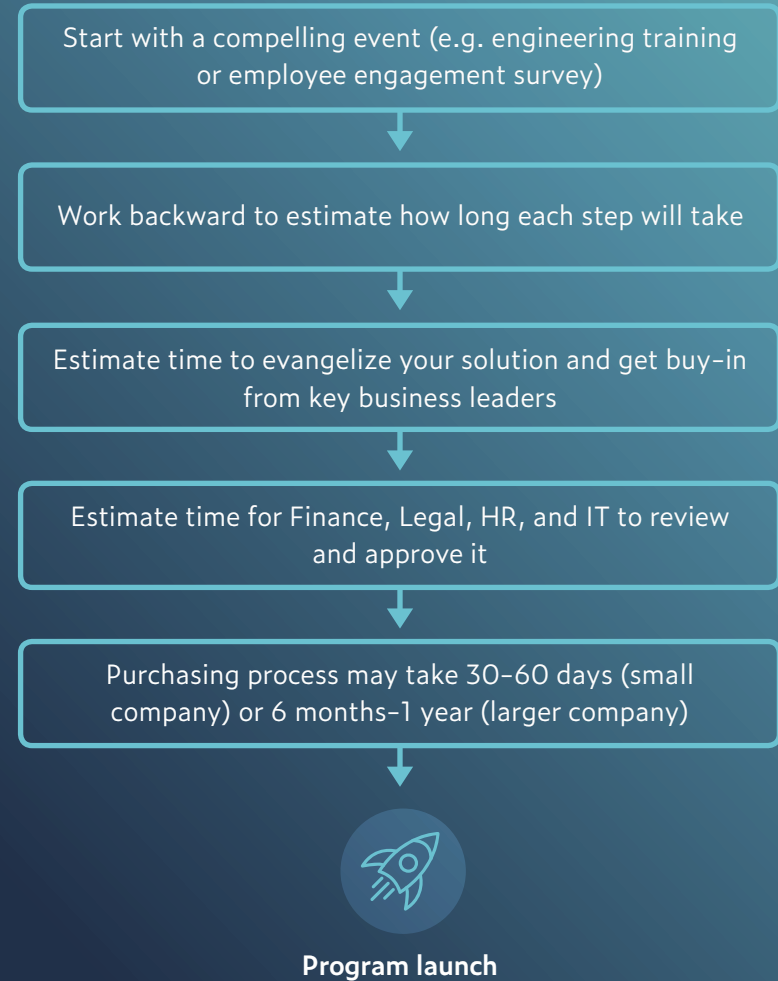for Business

Know where your budget is coming from

Training budgets sometimes come from the L&D team and sometimes sit with HR or individual departments. For example, if you want to offer training for your Engineering team, you may need to get the budget approved by the VP of Engineering. In many cases, L&D reports into HR and your HR leader may have the final say. No matter what, you'll need to make the case and partner closely with the department that holds the purse strings.

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Create a working timeline

How long will it take to roll out your learning program? The answer to this question varies significantly depending on the size of your organization and the number of stakeholders involved.

Start with a compelling event (e.g. engineering training or employee engagement survey)

↓

Work backward to estimate how long each step will take

↓

Estimate time to evangelize your solution and get buy-in from key business leaders

↓

Estimate time for Finance, Legal, HR, and IT to review and approve it

↓

Purchasing process may take 30–60 days (small company) or 6 months–1 year (larger company)

↓

Program launch

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3

Assemble your dream team

By now, you've probably already realized how important it is to make other teams part of your process. By creating your "dream team" of internal champions, you'll make it much easier to get budget and buy-in from stakeholders.

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Be a door-to-door salesperson

Build awareness by approaching business leaders and managers one by one and asking for 15 minutes of their time. You can do this both when you're trying to gather information and when you want to let them know about upcoming launches.

Key questions to ask:

What are your primary goals and priorities for your team over the next few quarters?

What are your biggest concerns for your team over the next few quarters?

What does training mean to you? How much time would you like your team to spend on training every week/month/quarter?

Here's how I think this training could help your team [accomplish X goal or eliminate Y issue]

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Go door to door

"When I was rolling out a new learning solution, I spent 5 or 6 months talking to managers, leaders, executives about their specific issues and goals. I was building an ad campaign. I was selling this vision, this idea of how they could get to that goal sooner and with less headache. I went door to door like a salesman and it worked!"

Brent Boeckman

CEO and Founder of Rising Strengths Consulting and formerly Global Head of L&D at Malwarebytes

Turn naysayers into supporters by building relationships

"The core to selling anything is building meaningful relationships. I proactively meet with as many people as possible. When people make requests, I deliver what they want quickly. When I encounter resistance, I ask those people to help me–this is a technique that gets them personally invested and can turn naysayers into champions."

Shelley Osborne

Head of L&D at Udemy

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Identify an active sponsor

Beyond just approving the idea in theory, an active sponsor will make sure that training programs actually get carried out. Your active sponsor is someone who will champion the benefits of your program and look for ways to get others motivated and involved. Ideally, you'll want to find someone who has the ability to influence others like your CEO or another executive.

Let your champions be your first testers

"When we were launching Udemy for Business, my CEO said, 'I should probably take a course first.' After that, he fell in love with it. Every time he'd talk in our town halls, he'd say, 'If you're not already doing Udemy, you guys need to get in there.'"

Paula Spears
Senior Director of Talent Management
& Employee Development at Cylance

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Find out who's
on your side

Most people agree in theory that learning should be a priority, but how do they respond when you ask them how much of their team's time can be allocated towards learning initiatives? Through these conversations, you'll learn who's on your side and who will need more convincing.

Who's in and who's out

"The first thing I figured out was who's on my team, and who's not. Who are my learning champions? So I sat down with every executive and said, 'What does training mean to you? How do you envision developing your people? Do you want to develop your people? What does all this look like philosophically?' And based on their answers, I would understand if they were on board or not, who I could count on, and who I needed to educate more on the initiative."

Brent Boeckman

CEO and Founder of Rising Strengths Consulting and formerly Global Head of L&D at Malwarebytes

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Find people who are already engaged in learning

"When I first identified employees taking online courses on Udemy by themselves and expensing it, I asked them what they loved about it. For example, an engineer taking Python training said: 'Here's why I love Udemy: I needed training on Python right now. I couldn't wait for a week–long training in a classroom. With Udemy, I got to download an online course and take just what I needed right then.' These nuggets of why people were learning on Udemy on their own was my selling point for rolling out a Udemy for Business subscription for the entire company."

Paula Spears
Senior Director of Talent Management
& Employee Development at Cylance

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Align priorities across Finance, Legal, HR, and IT departments as early as possible

There will likely be questions you don't anticipate from different departments such as Finance, Legal, HR, and IT, so be sure to loop them in early and find out if they'd like to be a part of any of your discussions or decisions. Consider inviting these key departments to your initial product demo and trial, so they can experience the value of the new learning solution.

Bring everyone along for the ride

"My biggest takeaway is I didn't spend enough time explaining Udemy for Business to my legal, IT, and finance departments. I just sent over the contract and then they had tons of questions. I needed to educate people more about this new learning resource. Finance didn't look at per person cost; they looked at the overall cost. Once I made them aware that some of our employees were already using the product and expensing the training, they began to understand the just-in-time training concept."

Paula Spears
Senior Director of Talent Management
& Employee Development at Cylance

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Finance

In many organizations, it's ultimately the CFO who has the ability to approve or reject the budget, so be sure to work closely with your finance team to avoid unpleasant surprises later in the process. Many finance leaders see learning as "soft ROI," and are trained to think in terms of numbers, so consider how you can clearly articulate how this investment solves a problem, reduces costs, or capitalizes on an opportunity to increase revenue. It's also important to have a clear understanding of where the budget is coming from and come to an agreement about who is paying for what.

Legal

Legal contract language can be another unanticipated hold-up in the rollout process. Issues often arise around privacy, liability, and indemnification. Talk to your legal team early on and bring them into the process. Ask them how much time they'd like you to allocate for contract review and negotiation and make sure they have the time and resources they need.
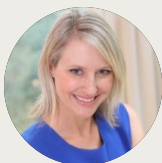
Human Resources

HR is often a logical champion and natural partner for learning programs. Many L&D programs solve objectives like retention and employee engagement—which HR is increasingly under pressure to address.

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Show the benefit for everyone

"The real benefit of a learning solution is it's going to solve a problem for every employee. Spend time on the front end, before starting the procurement process, having conversations with IT, Legal, and Finance to show how the learning solution is going to help them and their team grow. Get them excited about the courses first and how it's going to elevate their team or grow them personally. When they understand the value, then they get the full context. If people see how they will benefit from the new solution, it will make the procurement process easier."

Cara Brennan Allamano

Senior Vice President of Human Resources at Udemy

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Integrate L&D with all facets of your business

Finally, in order to increase your program's chances of success in the long-run, it's important to think about how you can create a culture of learning. The following are some examples of how you can integrate L&D throughout the company.

Make L&D a part of everything

"Integrating L&D with the business is key when rolling out new learning solutions. Make sure your company culture is part of it, how you onboard is part of it, and how you manage, retain, and let go of employees is part of it. L&D cannot be a siloed program or a siloed team. It has to be integrated into all facets of the business."

Brent Boeckman
CEO and Founder of Rising Strengths Consulting and formerly Global Head of L&D at Malwarebytes

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CASE EXAMPLE

Performance reviews

Malwarebytes

Motivate employees by integrating learning into performance reviews

At Malwarebytes, rolling out a new learning program with Udemy for Business involved formally including learning as a goal on annual performance reviews and allocating time to learn (20 hours per quarter), so employees could meet these goals.

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New hire onboarding

Employees start learning on Day 1

At Cylance, the L&D team gets new hires excited about learning from their very first day, creating a stronger alliance between HR/People team and L&D and demonstrating how much the company cares about their employees' development. "I build online learning into onboarding from Day 1, so it becomes ingrained when people start working for us, you sign onto our online learning platform and you start taking courses," says Paula Spears, Senior Director of Talent Management & Employee Development at Cylance.

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CASE EXAMPLE

Put learning on the calendar for everyone

Making time for learning

Shelley Osborne, Head of Learning & Development at Udemy, takes the following approach: "At Udemy, we create a culture of learning through our monthly Drop Everything and Learn (DEAL) hours. To solve the time constraint, our company schedules one hour of learning for all employees every month—just like an All-Hands meeting. We also keep the momentum going with online course recommendations on Slack by peers, regular prizes for the most active learners, and giveaways like branded chocolate, mugs, and hoodies.

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4

Speak in numbers: Develop your business case

You've assessed the needs in your organization. You've learned how decisions get made. You've started to assemble your dream team. In parallel, you'll also need to put together your business case so that you can continue to get key executives on board.

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Do your groundwork

Get referrals

Spend time researching what has worked well for other companies. Even if you don't have facts and figures for your company, you may be able to draw analogies with a similar organization. If you're having conversations with a salesperson for a potential learning solution, ask them for customers' referrals who are similar to your company.

Ask L&D and HR peers to share best practices on our Udemy People Innovators Community.

REQUEST TO JOIN

Get stories from similar companies

"I like to flip the steps during the procurement process. Normally, you talk to a sales person first, internal stakeholders second, and then you get customer referrals. I like to talk to the customer referrals early in the process before I talk to internal stakeholders. I'll ask the salesperson to give me customers who look like me and are a similar size company that is facing a similar choice. I'm always pleasantly surprised by other HR leaders and their openness. I can then use metrics from their experience for my deck to make my case internally."

Cara Brennan Allamano
Senior Vice President of Human Resources at Udemy

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Get benchmark data

Find out what the best-in-class companies are doing so you can paint a clear picture for your stakeholders. Use these innovative best practices as a starting point to design and make the case for your learning program.

Channel your "mini-me"

"I use benchmarking to show what's best in class and what we should be striving for. Then I piece together a program that reflects the key elements and provides similar value but within our budget and size. I call this the 'mini-me conversation' where I map out what the best-in-class companies are doing and then show our CEO and business leaders how we can do something similar without breaking the bank."

Cara Brennan Allamano

Senior Vice President of Human Resources at Udemy

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Gain access to the data you need from your company

If you're looking to measure ROI in terms of sales revenue, customer satisfaction, or even time to productivity among new hires, you will likely need to do some extra work to gain access to these numbers.

Access to data is the challenge

"Often the biggest challenge in building your metrics is gaining access to the data. L&D teams aren't always privy to data like performance or sales revenue. They also sometimes face resistance when trying to get this data. The best way to gain access to the data is to closely partner with the business leader that holds the key to the data whether it's HR, Finance, or Sales. They are one of the first leaders you'll need to turn into a champion."

Shelley Osborne
Head of L&D at Udemy

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Create metrics where you don't have them

In cases where you don't have metrics, fill in the gaps by collecting new data. Take the pulse of how employees rank Learning & Development in a survey. If your survey shows employees rank L&D in the top 3, you can share that information with your C–Suite. You can also ask if employees feel like they have opportunities to grow and track how that changes after you introduce your new learning solution.

Put your numbers together

Once you've conducted the initial research, you can start building a solid business proposal. Here are a few figures to consider:

- **Identify the current challenge** and the impact it's having on the business. Put it in terms of lost revenue, excess costs, and lost productivity.

- **Outline the benefits of your initiative**—how will it contribute to achieving business objectives?

- **Explain how your learning initiative will be implemented**, including budget, resources needed, and timeframe for launch. Compare it to alternative cost scenarios.

- **Identify expected outcomes** in terms of improved revenue, efficiency improvements, etc.

- **Align with business goals** like profit generation, business growth, revenue advancement, operational efficiencies, risk management & mitigation.

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CASE EXAMPLE

Cost savings and alternative cost scenarios

Advice from Paula Spears, Senior Director of Talent Management & Employee Development at Cylance

CYLANCE

"In business, you have to show a return on investment. This is especially true in Learning & Development because I don't generate revenue, I'm an expense. You have to show the break-even point and the return on investment with your L&D program or new resource.

To calculate the return on investment, I knew the cost per employee was a good price point. When I made the case internally for Udemy for Business, I knew some employees were already using Udemy themselves and expensing it. So I compared this cost with the cost of purchasing Udemy for Business for the entire company. Using this approach, I was able to show we would spend one-quarter of the amount on a Udemy for Business subscription.

Once we purchased Udemy for Business, I continued to show our CEO monthly metrics. I had a graph to show the break-even point comparing the amount we had previously spent reimbursing employees versus the annual subscription for the entire company. Over time, we're still getting a great return on investment."

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"The Udemy for Business analytics dashboard also helped me track metrics and prove my ROI. I was able to track and show adoption which was really important to our CEO. I was able to show that adoption never dipped or stayed the same–it was always going up. Using the analytics, I also shared how many new users we have, how many have taken courses, and the top 20 courses people are taking. Our CEO was very interested in all these metrics and what people were learning.

There was the added benefit of being able to learn whatever you wanted with a subscription model. Our tagline was: 'We don't care what you're learning–just learn.' People were learning more and it cost less.

I haven't started measuring this yet, but one of the benefits was also helping to build a culture of learning. I really do think that a person who is learning–whether or not it's for their job–is growing. And there's something inherent in a person who's learning and growing that adds to productivity."

Paula Spears

Senior Director of Talent Management
& Employee Development at Cylance

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CASE EXAMPLE

Malwarebytes: Efficiency and productivity improvements

Speed and efficiency are critical to anti-malware software company Malwarebytes' growth and success. Yet, the Quality Assurance (QA) team was weighed down by time-consuming manual processes. To improve productivity and effectiveness, the QA team manager identified new technology to automate the process and looked for training solutions to help upskill his team.

CHALLENGE
Sending the QA team to on-site Python training would incur high travel and training costs.

SOLUTION
QA team to take on-demand Python courses through Udemy for Business.

RESULTS

Entire team trained in 30 days vs. 6 month goal.

Substantial savings in travel, training, and labor costs.

Entire production calendar moved up which resulted in shipping product releases and updates ahead of schedule.

$2,340
Savings per employee

✕

11
QA engineers

=

$25,740
Total savings

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5

Pick good use cases and easy wins

Getting the green light to move forward with your learning program is a big accomplishment, but it's important to continue to be strategic in your next steps. You'll want to pick good use cases and easy wins so you can quickly prove the return on investment for your program.

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Consider the point of need and time

Successful programs are usually appropriately timed and focused on what the organization actually needs. That's why the needs analysis you conducted at the front end of the process is so important. What was something you discovered during these early conversations that's an urgent need you can address quickly?

Pick the right pilot audience

You want to have a group that will be receptive and engaged in your program, but at the same time, you don't want to create an echo chamber. Try to choose a mix of participants who will be enthusiastic but also unafraid to give you constructive feedback. It can also be beneficial to include naysayers because involving them in the pilot can be an effective way to get them invested in the program's success.

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Be agile

Don't spend months creating the perfect "turnkey" training program. Instead, build a pilot program and get it out there in the wild for testing. Accept that not everything about your program will be perfect from the outset. Ideally, it should be developed with constant feedback as part of an agile process. Be prepared to incorporate feedback and make adjustments quickly.

Watch webinar:
How to become an agile L&D team

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Manage realistic expectations about results

It will take time to gather data on many of the outcomes you're hoping to measure like productivity, retention, and engagement. Be aware of the fact that it may take several quarters to really see the impact of your programs. Make sure your stakeholders understand this, too.

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Cylance management training program

CYLANCE

Providing structure and guidance to online learning

When launching Udemy for Business at Cylance, Senior Director of Talent Management & Employee Development Paula Spears chose a topic that applied across all departments: management training. Paula explains, "We came up with five different competencies and tied Udemy content in with them like how to manage a team or be a better coach. They take 15 online courses, attend monthly discussions on each topic, do a capstone project, and at the end of 6 months, they get a certification." Not only was it easy to design this program around existing Udemy content, but Paula believed it would be useful because it could potentially be mapped to performance, promotions, and retention.

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CASE EXAMPLE

Udemy feedback training

Addressing a need with feedback is fuel

When she first joined as the Head of Learning & Development, Shelley Osborne wanted to create a program that served a real need and generated enthusiasm across the company. After conducting a needs analysis, she identified a demand for employees to hone their skills in giving and receiving feedback. As a result, she created the "Feedback Is Fuel" training. Since this was her first program, she spent a lot of time at the front end working with the marketing team to develop a launch campaign. She generated excitement by creating a witty "Mean Tweets" video with examples of "bad feedback" prior to the training. After the training, she organized a raffle with prizes to ensure people practiced what they learned. To be eligible for the raffle, employees had to give or receive feedback using the new method with 3 people. Over 80% of employees at Udemy took the course. When employees were asked if they would recommend the course to others, the program received a high Net Promoter Score (NPS) of 70.

Conclusion

The steps outlined in this guide will help you begin to make the business case for learning at your organization. But remember, once you successfully roll out a new learning solution, the work doesn't stop there. You'll need to continually rely on these 5 key steps to keep the momentum going. Be sure to build metrics into your L&D programs and measure your success over time, create a culture of learning across your organization, and meet regularly with leaders and managers to continuously prove the value of learning.

Let us help you prove the ROI of Learning

Find out how Udemy for Business can help your organization improve its productivity and employee engagement while saving costs. Partner with us and see how our on-demand online learning platform and speed to market can help your employees do whatever comes next.

GET IN TOUCH

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Checklist

Step 1: Act like a consultancy: Your employees' ROI is your ROI

☐ Don't start with your bells and whistles; start with stakeholders' concerns

☐ Connect your L&D programs to your employees' ROI

Step 2: Get crystal clear on your company's decision-making process

☐ Understand how major decisions are made at your company

☐ Align priorities across departments

☐ Know where your budget is coming from

☐ Create a working timeline

Step 3: Assemble your dream team

☐ Be a door-to-door salesperson

☐ Identify an active sponsor

☐ Find out who's on your side

☐ Align priorities across finance, legal, HR and IT departments as early as possible

☐ Integrate L&D with all facets of your business

Step 4: Speak in numbers: Build your business case

☐ Do your groundwork

    ☐ Talk to referrals

    ☐ Get benchmark data

    ☐ Gain access to key data

    ☐ Create metrics where you don't have them

☐ Put your numbers together

    ☐ Impact on the business: lost revenue, excess costs, lost productivity

    ☐ Budget, resources, timeframe of your program

    ☐ Alternative cost scenarios

    ☐ Expected outcomes: improved revenue and efficiency

    ☐ Alignment with business goals: profit generation, business growth,

    ☐ revenue increase, operational efficiencies, risk mitigation

Step 5: Pick good use cases and easy wins

☐ What's the point of need and time?

☐ Pick the right audience

☐ Be agile

☐ Manage realistic expectations about results

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About Udemy for Business

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