



**Simmons Learning Solutions**

INNOVATE, LEARN, GROW

## Building a Compelling Business Case for Learning & Development Initiatives

**Prepared for:** Learning & Development Managers

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**Prepared by Simmons Learning Solutions**

[www.simmonslearningsolutions.com](http://www.simmonslearningsolutions.com)

## Executive Summary

In today's volatile, fast-paced business environment, learning and development (L&D) plays a pivotal role in enabling agility, sustaining innovation, and building workforce resilience. Despite its strategic importance, L&D often faces significant hurdles in securing project funding or executive sponsorship. To overcome this, L&D managers must position their initiatives as indispensable levers for business performance.

This white paper offers a comprehensive, evidence-backed framework to help L&D professionals build robust, persuasive business cases that align with organizational priorities, quantify value, and mitigate perceived risks.

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## Introduction: The Case for a Business Case

A business case is more than a document, it's a strategic tool that:



**Translates learning needs into business impact**



**Establishes L&D as a value-driving partner**



**Informs resource allocation and investment decisions**



**Creates accountability through measurable outcomes**

By adopting a structured, data-informed approach, L&D leaders can elevate their role from training executors to strategic enablers.

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## Step 1: Define the Problem or Opportunity

Before proposing a solution, it's critical to articulate the business need driving the request. A clearly defined problem or opportunity anchors your case in real business relevance and creates urgency for action.

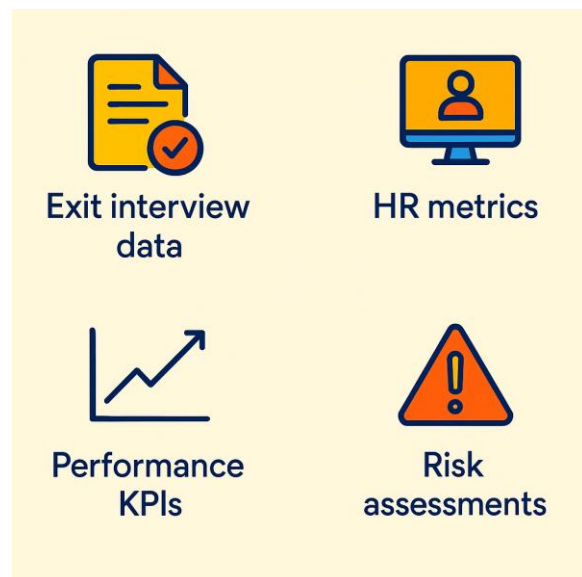
Start by identifying a critical issue, challenge, or growth opportunity:

- What is the business impact of the current gap?
- Who is affected and how?
- What are the financial, operational, and strategic consequences of doing nothing?

### Example:

"Employee onboarding inconsistency has led to a 16% drop in 90-day retention rates, costing the organization approximately \$1.2M annually in recruitment, training, and lost productivity."

Use:



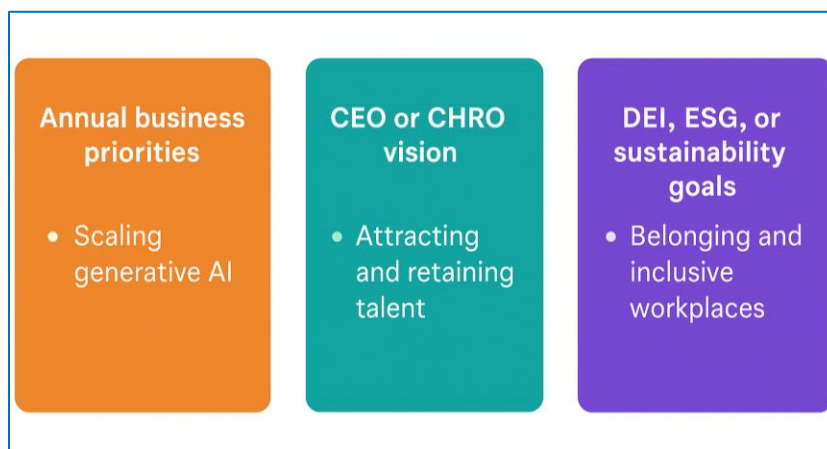
## Step 2: Align with Strategic Business Objectives

Once the issue is identified, connect it to the broader business strategy. This demonstrates that your initiative is not just a learning project but a solution tied to enterprise-wide goals and measurable outcomes.

Clearly connect the proposed initiative with overarching business goals:

- Increase market share
- Accelerate digital transformation
- Improve employee engagement and retention
- Address compliance requirements
- Drive customer satisfaction or innovation

Include references to:



**Pro Tip:** Use the language and metrics that your CFO, COO, and CHRO care about.

## Step 3: Propose a Solution with Clarity and Vision

After identifying the challenge and aligning with strategic goals, offer a clear and credible solution. Avoid vague or overly technical descriptions—clarity builds confidence and sets expectations.

### Outline the proposed learning initiative:

- Program title, purpose, and scope
- Learning modalities (eLearning, VILT, ILT, blended)
- Duration and delivery timelines
- Target audiences and personas
- Content partners or tools

### Include:



**Learning objectives and intended outcomes**



**Proposed instructional design models (e.g., ADDIE, SAM)**



**Scalability and sustainability potential**

### Example:

"We propose a blended leadership development program for first-time managers, combining self-paced modules, live coaching, and job shadowing to build foundational people management skills."

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## Step 4: Present Evidence-Based Rationale

Executives make decisions based on data. Use facts and figures to validate your assumptions and show that your recommendations are grounded in research, results, or pilot feedback.

Support your proposal with:

- Industry benchmarks
- Internal pilot results
- Case studies from comparable companies
- Feedback from employee surveys or focus groups

### Example Evidence:

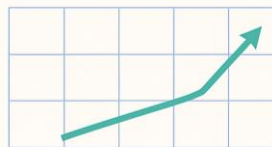
"Companies with structured onboarding programs achieve 50% higher new hire productivity. (SHRM, 2024)"

Use Visuals:

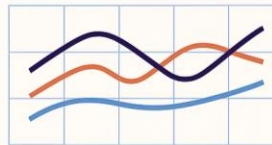
Charts showing  
cost of attrition



Forecasted retention  
improvement  
post-program



Engagement survey  
trendlines



## Step 5: Conduct a Cost-Benefit Analysis

No business case is complete without numbers. Provide a transparent breakdown of anticipated costs and expected returns to illustrate value, justify investment, and support informed decision-making.

Break down all direct and indirect costs:

- Design and development
- Technology and platform costs
- Facilitator and SME time
- Licensing and subscriptions
- Internal marketing and comms
- Program evaluation and analytics

Then calculate the benefits:



Estimated savings (e.g., reduced turnover, improved productivity)



Time-to-performance improvements



Risk reduction



Impact on KPIs

### Sample ROI Table:

Category	Description	Cost (USD)
Development	Custom eLearning, SMEs, ID	\$25,000
Platform	LMS integration	\$5,000
Facilitation	Internal or external experts	\$10,000
Evaluation	Pre/post metrics, dashboards	\$3,000
Total		<b>\$43,000</b>

### Expected Benefits:



**20% decrease in onboarding time**  
(Bersin by Deloitte, 2022)



**15% increase in new hire retention**  
(Glassdoor, 2023)



**\$65,000 in avoided turnover costs**  
(SHRM, 2024)



## Step 6: Identify Risks and Mitigation Strategies

Executives are trained to assess risk. Show that you've considered potential roadblocks and have a plan to proactively manage them. This builds trust in your leadership and reduces hesitation.

### Anticipate questions and concerns:

- What if adoption is low?
- How will we measure success?
- What if timelines slip or budgets increase?

### Include:



Change management plan



Stakeholder engagement strategy



Phased implementation with pilot testing



Contingency plans

## Step 7: Provide a Strategic Implementation Roadmap

A solid plan reassures stakeholders that you've thought through execution. A phased roadmap also creates space for feedback, iteration, and agile decision-making along the way.

Break the plan into actionable phases:

- Discovery & Needs Assessment
- Design & Development
- Pilot & Feedback Loops
- Full Launch
- Post-Launch Optimization & Scaling

Include:



**Roles and  
responsibilities**



**Timelines and  
dependencies**



**Key milestones and  
decision points**

## Step 8: Make the Ask

End with a confident and concise request. Whether you're asking for funding, time, or sponsorship, this is your moment to clearly articulate what you need and why.

Close with a confident recommendation:

- Request for funding
- Approval of proceeding with pilot
- Executive sponsorship or stakeholder buy-in

Support your request with:



**Executive  
one-pager**



**Data  
visualizations**



**Key milestones  
or pilot feedback**

## Conclusion

In an era defined by rapid transformation and talent shortages, the strategic value of L&D is undeniable. But value alone doesn't secure funding. Influence does.

By combining strategic alignment, clear value propositions, strong financials, and stakeholder-oriented language, L&D professionals can secure the support needed to design and deliver high-impact learning solutions that drive meaningful business outcomes.

## References

- Society for Human Resource Management (SHRM). (2024). "Onboarding Statistics and Best Practices."
- Bersin by Deloitte. (2022). "High-Impact Learning Organizations."
- Glassdoor. (2023). "Employee Retention and Productivity Insights."
- LinkedIn Learning. (2024). "Workplace Learning Report."
- Association for Talent Development (ATD). (2023). "Measuring the Impact of Talent Development."
- Harvard Business Review. (2024). "The Business Case for Learning and Development Investments."

## About Simmons Learning Solutions

At Simmons Learning Solutions, we specialize in creating and delivering impactful learning experiences. We offer interactive, off-the-shelf courses on today's most in-demand topics. Our approach to training is comprehensive, blending eLearning, Instructor-Led Training (ILT), Virtual Instructor-Led Training (VILT), performance support, and video development to meet a wide range of organizational needs.

We provide end-to-end services tailored to your specific goals, from content creation and curriculum design to facilitator training and technology setup. Our team of experienced instructional designers and trainers work collaboratively to craft engaging, effective, and adaptable training programs that maximize knowledge transfer and participant satisfaction.

We're passionate about delivering highly engaging, innovative, and interactive training experiences. By leveraging our expertise in instructional design and the latest technology, we help our clients achieve their strategic learning objectives.



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