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# Learning Platform Toolkit

Build an Air-Tight Learning Platform Business Case

Sometimes, your executive team won't immediately see the full value of a learning technology investment. To convince them, you'll need to understand their priorities and the challenges standing in their way. Then, you can connect the dots and position your request for learning technology to address their specific concerns.

Your ability to deliver a compelling business case for a learning platform hinges on your ability to structure an argument that resolves the chief challenges and priorities of your audience. No matter which executive you want to convince, make sure you're managing expectations about achieving success – don't overpromise and underdeliver.

Learning technology is not something you just turn on and see instant results – building value takes time and effort.

To help you along the way, we've outlined below the steps you can take to build a business case that seeks to understand management's objectives, create a financial case that aligns with their objectives and helps you to prove that learning can be your organization's competitive advantage in a sometimes chaotic and complex business environment. Today, an organization's success depends on its ability to operate with agility, develop its people and retain them to mitigate the inevitable challenges of the future.



# Today, Learners Need (And Expect)...

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More than ever, employees expect their employers to invest in their professional development, especially younger Millennial and Gen-Z employees. In fact, these younger cohorts value professional development even more so than higher salaries (who'da thunk).

## 1. "WHAT'S IN IT FOR ME?"

Almost 95% of employees say they would stay with a company longer if it invested in their career development, according to LinkedIn [Learning's 2018 Workplace Learning Report](#).

Millennial employees now make up a heavier percentage of the North American workforce than any other generation. Millennial workers (i.e. the next business leaders of the world) expect learning to be a component of their everyday work lives, and see professional development as a benefit their organization can provide them, holding it in higher regard than higher salaries, in many cases.

## 2. "I WANT MORE CONTROL OVER MY LEARNING JOURNEY"

Traditional learning focuses on a teacher-driven classroom where the student follows the learning path. With [learner autonomy](#), the traditional teacher is removed from the equation and it is up to the student to drive their own learning experience. It is more about a learner's ability to take charge of their own learning

## 3. "I WANT TO LEARN MORE FROM MY MANAGER"

[Fostering a culture that embraces knowledge sharing](#) is one that helps your organization fill information gaps, scale output and productivity, and stimulate the leaders within your ranks.

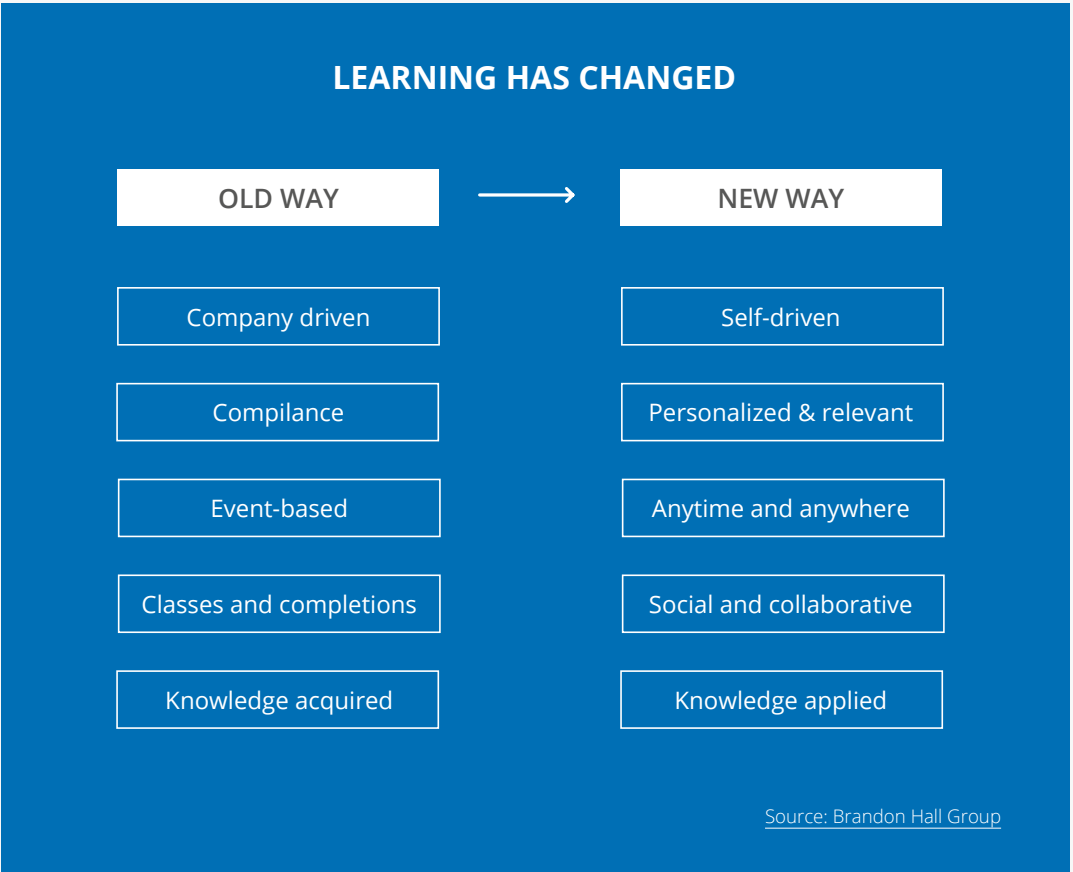
## 4. "I WANT HIGH-TECH TOOLS TO ENABLE LEARNING"

[Mobile learning and micro-learning](#) initiatives have been embraced and encouraged in e-Learning programs as leaders realise that these devices can be used on the job, at the point of need, and help facilitate social interaction. But this is only the beginning when it comes to creating fully immersive learning experiences.

Having a learning platform completely driven by new technologies, such as artificial intelligence, is the key to freeing up L&D admins from day-to-day repetitive tasks and giving them the freedom to strategically implement and achieve organizational objectives.

Articulating the needs and expectations of learners to decisions makers is key to securing buy-in. Equally as important is outlining the many ways learners can play an active role in L&D. In fact, an overwhelming 98% of organizations seek to support the sharing and surfacing of internally-produced, user-generated knowledge across the business, with the use of in-house social sharing tools increasing 55% since 2016.

Social and collaborative learning tools remain a top learning technology priority among organizations, followed closely by mobile delivery and the data analytics tools needed to make sense of learning platform insights to influence the design and deployment of future learning activities.



Understanding the many ways enterprise learning has changed, along with the expectations of your workforce and their professional development, acts as a good conversation starter and expectation setting mechanism that emphasizes the importance of L&D and how it can be applied to your organization. With that in mind, it's important to tie those insights to management's expectations as well.



## CONNECT MANAGEMENT OBJECTIVES TO LEARNER EXPECTATIONS TO EXPRESS TRUE VALUE

Understanding their collective and individual goals will help you present a case that meets their needs.

Sell value, not features – sure, learning platforms are equipped with a ton of high-tech features, but you need to focus on selling value to decision-makers. Don't say "this solution has a great mobile app", but instead "mobile learning gives our learners a way to engage with our programs at the point of need, online or offline, wherever they are, leading to higher platform adoption and more engagement." Doing so gives you a way to align their goals with the needs and expectations of your workforce. Take the time beforehand to understand how employees feel and/or see L&D in their daily lives and align those insights to overall operational goals.

## TALK IN NUMBERS: CREATE A FINANCIAL CASE THAT ALIGNS WITH THEIR OBJECTIVES

Work backward from the main objectives that your executive team holds dear. If revenue is the main objective, base your case on revenue.

Show how your new learning platform will speed up learning delivery and quality, make it more accessible to, for example, shorten time-to-market cycles.

Areas to reference for investment gains that express the connection between L&D and your bottom line, according to E-Learning Industry, include: revenue growth in customer and partner training, workforce productivity gains (faster production + better product quality = happier customers + larger sales) and salesforce productivity gains (better training = more loyalty and sales/revenue).

## DISCUSS, DON'T PRESENT

Ask questions that seek to understand what management is looking to achieve.

Transition by saying, "If I could show you how to meet those objectives efficiently and effectively, would you be interested in learning more?"

## USE REAL-LIFE CASE STUDIES TO SUPPORT YOUR CASE.

Doing-so helps you answer the potential question, "This all sounds good in theory. How do you know it will work?" Be ready if they say "yes". Have your high-level plan ready, as well as an overview of the next steps, timeframes, and required resources.

Amnesty International uses Docebo to engage audiences and connect people from around the world.



[DOWNLOAD THE CASE STUDY](#)

The IGA Institute is enhancing customer service with Docebo



[DOWNLOAD THE CASE STUDY](#)

Intesa Sanpaolo flipped its L&D strategy to emphasize bite-sized, user-generated content.




[DOWNLOAD THE CASE STUDY](#)

Every business has problems. You're building a business case for a learning platform because you think it will help resolve some of those problems.

Your case might make complete sense to you, but to guarantee the buy-in necessary to bring your project to life, you're going to need to position your justification accurately to express the benefit of learning technology each executive will see across their respective departments.

- Break down the problems of each person you'll have to convince.
- What's your CEO or CLO's biggest headache? For example, is there concern about skills gaps holding back your organization's ability to grow?
- Do they lack visibility into professional development related issues from the bottom up? Seek to understand how your learning solution addresses this issue.
- What did they announce as their biggest priority during your company's annual meeting?

Directly addressing these kinds of problems will make your business case stronger. Follow the breakdown below to connect the dots between your executives' chief concerns and how you'll address them.

		CONCERNS	BENEFIT OF TECHNOLOGY	
	CLO/VP/DIRECTOR OF TRAINING	<ul style="list-style-type: none"> <li>• Attract and retain key talent</li> <li>• Onboard more people and make them productive in less time</li> <li>• Keep up with fast growth</li> <li>• Staff teams across a global company</li> </ul>	<ul style="list-style-type: none"> <li>• Provides continuous learning and development opportunities</li> <li>• Centralizes learning content and delivery</li> <li>• Scale seamlessly as your business grows</li> <li>• Increases collaboration among disparate teams</li> <li>• Support social and experiential learning</li> <li>• Take learning on the go with mobile learning (online/offline)</li> </ul>	
<div> <div>PUT YOUR ONBOARDING ON AUTO-PILOT</div>  <div> <a href="#">DOWNLOAD THE REPORT</a> </div> </div>				
	CEO	<ul style="list-style-type: none"> <li>• Meet board expectations for profitability</li> <li>• Innovate and differentiate from the competition</li> <li>• Build and align the organization by enhancing collaboration</li> <li>• Manage risk</li> </ul>	<ul style="list-style-type: none"> <li>• Improves efficiency to meet business objectives</li> <li>• Increases collaboration and skills development, creating a stronger, more engaged, and higher-performing workforce</li> <li>• Facilitates consistent learning and social learning so knowledge is capitalized on within the organization</li> <li>• Minimizes risk by maintaining compliance risks</li> </ul>	

		CONCERNS	BENEFIT OF TECHNOLOGY	
	COO/VP OF OPERATIONS	<ul style="list-style-type: none"> <li>• Support organizational growth</li> <li>• Manage finances and budgets</li> <li>• Make business decisions based on data and statistics</li> </ul>	<ul style="list-style-type: none"> <li>• Effectively equips new hires with the skills they need to meet the speed of growth</li> <li>• Better track ROI on learning investment – an off-the-shelf system is more cost-effective than developing a system internally</li> <li>• Help fill skills gaps and increase individual and organizational performance</li> </ul>	
	VP/DIRECTOR OF CUSTOMER SUCCESS	<ul style="list-style-type: none"> <li>• Manage customer onboarding</li> <li>• Increase customer retention</li> <li>• Expand revenue in accounts through cross-selling and upsell opportunities</li> <li>• Encourage customer advocacy</li> </ul>	<ul style="list-style-type: none"> <li>• Centralizes and facilitates customer onboarding programs</li> <li>• Tracks customer onboarding activities to keep customers engaged and prevent churn</li> <li>• Analyzes customer skills to understand areas of opportunity</li> <li>• Transforms customers into advocates with ongoing engagement</li> </ul>	



		CONCERNS	BENEFIT OF TECHNOLOGY	
	VP/DIRECTOR OF ENABLEMENT, SALES	<ul style="list-style-type: none"> <li>• Build sales enablement programs for more effective onboarding and continuous development</li> <li>• Create a more efficient hiring process</li> <li>• Collaborate with marketing, customer success, and partners to ensure sales has the appropriate training materials</li> <li>• Encourage sales engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Prevents what salespeople dislike most: wasting time fishing for the latest product information</li> <li>• Allows salespeople to learn and stay up-to-date so they can spend more time selling</li> <li>• Allows learning content to be easily shared and accessed at the point of need</li> <li>• Facilitates social learning so salespeople can easily access subject matter experts</li> <li>• Leverages your salespeople's competitive drive to increase engagement and, therefore, knowledge retention</li> </ul>	

TURN YOUR LEARNING  
PLATFORM INTO A SALES  
ENABLEMENT MACHINE



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		CONCERNS	BENEFIT OF TECHNOLOGY	
	VP/DIRECTOR OF PARTNER CHANNELS	<ul style="list-style-type: none"> <li>• Develop relationships and structure effective partnerships with channel partners</li> <li>• Facilitate training programs to ensure partner channels are up-to-speed</li> <li>• Drive revenue via channel partners</li> </ul>	<ul style="list-style-type: none"> <li>• Centralizes and facilitates partner onboarding programs</li> <li>• Tracks partner training activities to analyze partner opportunities and performance</li> <li>• Consistently engages and equips partners with the information they need to increase performance</li> </ul>	
	IT LEADERSHIP	<ul style="list-style-type: none"> <li>• Protect the company against IT risks</li> <li>• Evaluate all technology purchases</li> <li>• Ensure the IT infrastructure is successfully exploited to achieve continuous improvement</li> </ul>	<ul style="list-style-type: none"> <li>• Mitigates the complexity and security risks associated with multiple technologies</li> <li>• Easily and securely integrates with a variety of third-party platforms</li> <li>• Reduces maintenance and support efforts (because it's a cloud-based system)</li> </ul>	



## Together, let's 'Get The Yes' – make learning your competitive advantage

We're here to help you along the way. If you need assistance putting together your learning platform business case, contact Docebo today!

[CONTACT US](#)

Join 1,500 global organizations who are using Docebo and artificial intelligence to change the way their people learn, produce better learning outcomes and generate measurable business value.