OasisLMS

The LMS Business Case

A fill-in template for the people who have to convince a board, a finance committee, or an executive director.

Most people who want to replace their learning platform don't lose the argument on the merits. They lose it because the request arrives as a single number with nothing behind it, and the committee has ten of those to choose between. Fill in the eight sections that follow and you'll have the one that survives the meeting.

This PDF is fillable. Open it in any PDF reader, type into the fields, and save.

1. The ask

One sentence and the number, in the first two lines. Committees decide how much attention to give you in the first fifteen seconds.

We're requesting (amount):

For which budget year, and when implementation would begin:

2. What it's costing us now

This is the section that wins or loses it, and the one people leave out. The current system is not free. Put real numbers here even if they're estimates, and say they're estimates.

HIDDEN COST	ANNUAL
Staff hours on manual reporting Hours per month pulling and reconciling reports, times loaded hourly cost, times 12	
Support tickets caused by the platform Member tickets per month that exist only because the system is confusing	
Course revenue not earned Courses you couldn't launch, or that underperformed because the catalogue is hard to navigate	
Compliance and reporting risk Cost of one late or corrected filing, times the realistic annual likelihood	
Workarounds you're paying for Spreadsheets, side tools, contractors and integrations that patch the gap	
Current annual cost of doing nothing	

3. What changes

Three outcomes, no more, each one measurable. A committee cannot evaluate "improved user experience", but it can evaluate "credit reporting drops from 30 hours a month to under 3".

Outcome 1, and how it will be measured:

From: To:

Outcome 2, and how it will be measured:

From: To:

Outcome 3, and how it will be measured:

From: To:

4. The full cost, over three years

Show three years, not one. A one-year number invites "and then what", and if you don't answer it someone else will answer it worse. Include your own team's time.

LINE	YEAR 1	YEARS 2 AND 3
Platform subscription		
Implementation and data migration		
Integrations (AMS, payment, single sign-on)		
Internal staff time to implement		
Training and content migration		
Total		

5. What it returns

Set this against section 2. If the return is mostly reclaimed staff time, say what that time gets spent on instead. Be conservative: a number the committee doesn't believe costs you more than a smaller one they do.

Staff time reclaimed, and what it gets redirected to:

Revenue opportunity, and where it comes from:

Retention or engagement effect:

Payback period (months):

6. What happens if we don't

Every proposal competes against "let's revisit this next year", and that option always looks cheaper because nobody prices it. Price it. Be honest, including about what can genuinely wait.

If we defer, this is what happens:

The cost of a one-year delay, and what makes it up:

What can safely wait:

7. Risk, and how it's handled

Naming the risks yourself is what makes the rest credible. The board will think of them anyway, and it lands far better coming from you with an answer attached.

RISK	HOW IT'S MANAGED
Migration loses historical records	
Members struggle with the change	
Implementation runs past the date	
Other:	

8. The decision we're asking for

End with the specific action, the date it's needed by, and who owns it. A proposal that ends without a named decision gets tabled, and tabled is the same as no.

We're asking (which body) to approve (what amount):

By this date, so implementation can begin:

Project owner:

One more thing before you send it

Read it back and cut anything that explains how the software works. Nobody on a finance committee is evaluating the software. They're evaluating whether you've thought it through.

Ready to make the case?

Use this however you like. Change it, cut sections, put your own logo on it. If it helps you get the decision you need, we'd rather you send it than credit us.

If you want a second set of eyes on a draft before it goes to your board, send it over. We read these all the time and we're happy to.

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OasisLMS builds learning and credentialing platforms for associations, medical societies and health systems.