

# I built this

## The Learning Business Case Creator

Create a compelling and credible business case for your learning initiative.

To use this tool, you need to know:

- The business problem or initiative this learning supports
- Estimates for company revenue and overheads
- Who will design, deliver, manage, and attend the learning
- Approximate wages for the delivery team and the learners
- Likely costs for platforms, suppliers, or other investments

Get started →



# to protect L&D's budget

Swipe to see how it works →



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I see too many L&D budgets get cut as soon as times get tough.

I also see too many consultants get stuck selling their time, not their value.

**Let me talk to you about a secret weapon that, until now, I've kept to myself.**



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For a little while, I've been using a tool that helps consultants and L&D teams say:

**“If we invest £X in this learning, we believe we can create £Y value by impacting Z.”**



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This tool helps you forecast the impact of learning even if...

- Your business is rubbish at collecting data
- You only have 30 minutes to put together a business case
- You hate numbers and statistics



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I've secretly shown it to a few people, and the response has been rather encouraging:

- “I can’t believe nobody has done this already.”
- “This is exactly what I need for my clients.”
- “This is so cool.”

Which is why I've decided to share it with the world.



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I've called the tool **The Learning Business Case Creator** (not the most creative name, I know, but at least you know what it does!) It's structured into five steps, which I'll talk you through now 📱

1. The problem to solve

2. Investment needed

3. Theory of impact

4. Company finances

5. Return on investment



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# The problem to solve



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You start by describing the business problem in boardroom language. The type of problem in the type of language that whirls around the CEO's head.

The tool remembers this for later.

STEP 1:

## The problem to solve

Use the space below to describe this business problem in boardroom language, not L&D language. This will go into your ROI forecast and you can edit it later if needed.

For example:

- We have spent £1 million on new technology but people aren't using it.
- Our customer complaints and refunds are rising, cutting our margins.
- Our revenue has dropped by X%, despite our plans to grow.

Describe the business problem here...

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Continue to Step 2 →



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# Investment needed



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Next, the tool helps you estimate how much the learning will cost. It breaks the cost into four costs: internal team, tools, suppliers, and learning time.

STEP 2:

## Investment needed

We'll walk through each type of cost, one at a time.



### Internal team costs

The internal team involved in designing, delivering, or managing your learning initiative.



### Tool costs

Any platforms, systems, software, or licences that you will need to deliver your learning experience.



### Supplier costs

External support such as consultants, facilitators, or content providers brought in to help deliver the learning.



### Learning time costs

The cost of people's time away from their day-to-day roles while they participate in the learning experience.

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Estimate team costs →



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One-by-one, the tool helps you figure out the four costs. At the back end, it does all the calculations for you.

**STEP 2:**

## Investment needed

**Internal team costs**

Add the people involved in designing, delivering, or managing the learning. This helps show how much internal effort is needed, not just external spend.

| Type of person      | Days | Annual salary (£) |                                                                                       |
|---------------------|------|-------------------|---------------------------------------------------------------------------------------|
| Project lead        | 2    | 100,000           |  |
| Learning designer   | 15   | 60,000            |  |
| Multimedia designer | 10   | 60,000            |  |
| Project manager     | 5    | 40,000            |  |

[+ Add person](#)

[← Back](#) [Share tool costs →](#)



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# Theory of impact



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Next, the tool helps you articulate how your L&D could benefit the bottom line by increasing revenue or reducing costs.

This is where you start thinking about how your learning brings commercial value.

**STEP 3:**

## Theory of impact

How your learning will increase revenue

Select the options below that explain how your learning will increase revenue. You don't need to select many. One or two strong, believable mechanisms are more convincing than several weak ones.

- ☐ **Number of new customers**  
Improves conversion or win rates by increasing confidence, judgement, or effectiveness.
- ☐ **Repeat customers**  
Improves consistency and quality of experience, increasing retention.
- ☐ **Average transaction value**  
Helps your business sell more in an average transaction.
- ☐ **Cross-sales**  
Helps people to upsell or cross-sell our products or services.
- ☐ **Service or product price**  
Improves confidence and value articulation, protecting price and margin.
- ☐ **Other (please specify and describe)**  
A different revenue mechanism specific to your business.

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# Company finances



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Next, you share annual revenue and overheads figures for your organisation (or your part of it).

These are usually easy to get in a few minutes from:

- Annual reports or investor presentations
- Internal finance dashboards
- Budget or planning documents



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You can base this year's estimates on last year's figures, a projection for this year, or an average over the last few years.

STEP 4:

## Company finances

### Estimate your current revenue

Estimate a revenue figure for the business or the area of the business where the learning initiative will be delivered. You can base this on:

- Last year's actual revenue
- A projection for this year
- An average across the last 5 years

Amount (£)

e.g. 10,000,000

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Continue to overheads →



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# Return on investment



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Finally, you estimate the percentage you believe your learning could feasibly improve revenue or drive overheads.

There's no exact science to this. The trick is to be conservative and explain your assumptions to the business. You can always change it later.

STEP 5:

## Return on investment

Let's now estimate the impact you believe the learning could have on revenue and overheads. There's no exact science to this. Ask yourself, "Would you feel comfortable sharing this assumption with your CFO?"

### Revenue improvement

Conservative estimate (%)

e.g. 1

Optimistic estimate (%)

e.g. 3

### Overhead reduction

Conservative estimate (%)

e.g. 0.5

Optimistic estimate (%)

e.g. 2

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Continue to Step 6 →



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Then with a single  
click, the tool  
does the hard  
work for you



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The tool pulls together everything you've told it to give you a one-page summary of your financial forecast:

## Your business case report

Investment summary

The business faces a problem: We have spent £1 million on new technology but people aren't using it. A business case for a learning initiative that targets this challenge is summarised below. Click the drop-down sections below for more detail.

|                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>£115,000</b></p> <p>Investment</p> <p>The total investment in learning includes:</p> <ul style="list-style-type: none"><li>• Team (£7,308)</li><li>• Tools (£0)</li><li>• Suppliers (£50,000)</li><li>• Learning time (£57,692)</li></ul> | <p><b>£240,000</b></p> <p>Benefits</p> <p>We believe this could increase revenue by 0.1–0.2%, by impacting:</p> <ul style="list-style-type: none"><li>• Repeat customers</li><li>• Cross-sales</li></ul> <p>We also believe this could lower overheads by 0.2–0.3%, by impacting:</p> <ul style="list-style-type: none"><li>• Turnover</li><li>• Sales cycle length</li><li>• Ramp-up time</li></ul> <p>The total impact would be £240,000 to £410,000.</p> | <p><b>109%</b></p> <p>Return</p> <p>A conservative estimate of our return would be £240,000. A more optimistic return would be £410,000.</p> <p>This would equate to an ROI between 109% and 257%.</p> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Investment

Benefits

Return

Caveats and assumptions

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Download as PowerPoint

Start over



The tool lets you:

- Download an editable PowerPoint that summarises your investment case
- Go back and edit your business case
- Show your assumptions and calculations



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Whilst this tool isn't right for every learning initiative, it's helped me supplement my business case for bigger initiatives and entire learning strategies.

It helps L&D talk the same language as the CEO, so you can turn learning from a nice-to-have into a need-to-have.

**And I truly believe that's what our industry should be aiming for.**



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# Wanna give it a try yourself?

Comment or DM me the word 'DEMO'

