# 

*Replace image with your company logo*

# Building the Case for eLearning

This comprehensive template helps you create a persuasive, data-driven business case for implementing or expanding eLearning in your organisation. Use it to align learning initiatives with strategic objectives, quantify benefits, and address risks before presenting for approval.

## 1. Overview

Summarise the purpose, background, and scope of this business case. Include strategic alignment to organisational goals such as compliance, innovation, customer satisfaction, or workforce capability.

Example: This proposal outlines the implementation of an organisation-wide eLearning program to reduce training costs, improve consistency, and enhance learner engagement.

**Stakeholders:**

**Project Sponsor:**

**Date:**

## 2. The Problem

Describe the challenge or inefficiency in your current training approach. Include metrics where possible.

Examples:

• High facilitation or travel costs for classroom delivery.  
• Inconsistent content delivery leading to audit failures.  
• Staff unable to access learning remotely.  
• Manual tracking and reporting processes.

Use the table below to summarise the current and desired states:

|  |  |
| --- | --- |
| Current State | Desired Future State |
| Face to face sessions vary by facilitator and lack consistency. | Online modules ensure every learner receives the same key messages. |
| New hires rely on shadowing; onboarding quality depends on who trains them. | Structured eLearning ensures all new starters complete consistent, trackable induction. |
| Training materials live in shared drives and are often outdated. | A central LMS hosts version-controlled, up-to-date modules accessible anytime. |
| Compliance training requires manual sign-offs and spreadsheets. | Automated tracking and completion certificates save admin time and reduce errors. |
| Travel and facilitation costs limit how often refresher training can occur. | eLearning reduces travel costs and enables frequent, flexible refreshers. |
| Policies are shared as PDFs with little engagement. | Interactive Rise 360 modules transform policies into searchable, scenario-based content. |
| Learners forget content soon after workshops. | Microlearning reinforces key points with short, mobile-friendly follow-ups. |
| Limited visibility of learning progress across departments. | Birch dashboards and reports provide real-time data for managers and HR. |
| Inconsistent branding and design across courses. | Unified templates in Articulate ensure professional, on-brand learning experiences. |
| Difficulties reaching remote or shift-based staff. | Mobile-ready courses allow learners to complete training anywhere, anytime. |
| Technical content relies on lengthy manuals. | Short demonstration videos and animations make complex tasks easier to grasp. |

## 3. The Impact

Quantify the financial, operational, and cultural impacts of the current challenge.

Example metrics: average cost per participant, training time per employee, compliance completion rates, error rates, or customer satisfaction scores.

Optional Impact Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
| Impact Area | Current Measure | Target Outcome | Potential Benefit |
|  |  |  |  |
| Compliance completion | 65% completion | 95% completion | Reduced risk of non-compliance fines |

## 4. The Solution and Approach

Outline your proposed eLearning approach and how it will solve the identified challenges.

Include:

• Learning objectives and success measures  
• Proposed tools and approach (Rise 360, Storyline 360, Birch LMS, animation)  
• Target audience and accessibility considerations  
• Integration with current systems or platforms  
• Example structure for an Articulate Rise module (Introduction → Core Topics → Scenarios → Quiz → Resources)

## 5. Benefits and ROI

Demonstrate both tangible and intangible benefits using evidence or case studies.

* Example ROI formula: ROI = (Net Benefits / Total Costs) × 100
* Example calculation: Training cost reduction of $100,000 vs $30,000 development cost = 233% ROI.

Key benefits include:

• Reduced facilitation and travel costs  
• Faster onboarding and higher productivity  
• Consistent knowledge delivery  
• Increased engagement and retention  
• Improved compliance and audit readiness  
• Continuous learning culture

## 6. Recommended Approach

Select the most appropriate delivery format for your training type.

|  |  |  |
| --- | --- | --- |
| Training Type | Best Format | Authoring Approach |
| Procedures & Policies | Modular eLearning | Rise 360 |
| Soft Skills | Scenario-based Learning | Storyline 360 |
| Product/System Demonstrations | Visual Learning | Animated Video or Screen Recording |
| Compliance | Short, Trackable Modules | Rise + Quiz Bank |
| Leadership & Culture | Blended Pathway | Storyline 360 + Virtual Facilitated Sessions |

## 7. Example Scenarios

1. Turning Policy PDFs into Dynamic Learning – Reduced training time by 60% with interactive Rise modules.
2. Leadership Skills That Stick – Improved leader confidence by 40% through Storyline branching scenarios.
3. Animated Safety Series – Lowered incident rates through engaging visual storytelling.
4. Compliance Training Audits – Automated certificates and tracking simplified audit reporting.
5. Onboarding for Hybrid Teams – Consistent induction experience across all locations.
6. Data-Driven Conversations – Dashboards identified coaching needs and measured behaviour change.
7. Customer Service Microlearning Boost – Improved NPS by 18% using 5-minute scenario videos.
8. Technical Training Refreshers – Maintained certification compliance through quarterly Rise updates.

## 8. Implementation Plan

Outline the key stages, responsibilities, and timeframes for implementation. Here are some examples.

|  |  |  |
| --- | --- | --- |
| Phase | Key Activities | Timeline |
| Discovery | Define objectives, success measures, and key stakeholders. | Week 1 |
| Design | Gather content, storyboard and visual design approval. | Weeks 2–3 |
| Development | Build Rise/Storyline modules and integrate animations. Sync audio narration. Review cycles. | Weeks 4–6 |
| Pilot | Test with sample users, gather feedback, refine content. | Week 7 |
| Rollout | Deploy modules via LMS (e.g., Birch) and monitor engagement. | Week 8 |
| Evaluation | Collect data on usage, feedback, and outcomes for ROI reporting. | Week 9+ |

## 9. Risk Analysis

Identify potential challenges and strategies to mitigate them. Assess each risk by likelihood and impact. Here are some examples.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk | Likelihood | Impact | Mitigation Strategy | Owner |
| SME availability | Medium | High | Pre-book SME reviews and use Articulate Review 360 for async feedback | Project Manager |
| Scope creep | Medium | Medium | Lock deliverables during storyboard sign-off | Instructional Designer |
| Technical limitations | Low | Medium | Early testing in LMS / Birch QA environment | Developer |
| Learner engagement | Medium | High | Use scenario-based learning and animation to maintain interest | Learning Designer |
| Accessibility compliance | Low | High | Apply WCAG AA standards and test with screen readers | QA Specialist |
| Change fatigue | Medium | Medium | Include change communications and a champion network | Client Lead |

Summary: Risks can be effectively managed through proactive planning, clear communication, and iterative review cycles.

## 10. Next Steps

Summarise immediate actions to progress this business case.

Examples:  
• Schedule scoping session  
• Confirm stakeholders and timelines  
• Approve budget estimate  
• Meet with vendors  
• Prepare EOI

**Approval Table:**

|  |  |  |
| --- | --- | --- |
| Name | Role | Signature / Date |
|  |  |  |

Need help with your Business Case? Contact [B Online Learning](https://bonlinelearning.com)