

DON'T JUST BUILD

YOUR BUSINESS CASE FOR A
LEARNING PLATFORM.

PROVE IT!



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Introduction

In this eBook, you'll learn how to put together an effective proposal that will not only convince decision-makers to sponsor your project and allocate budget but will also provide *evidence*—and give you and your team *confidence*—that what you're planning to do will actually work!

Going through this process will enable you to demonstrate your potential return on investment (ROI)—not just hypothetically, but with *actual results*. The Rockstar Learning Proof-of-Concept Model™ will also enable you to test specific measures of organizational improvement like reducing cost and inefficiency; increasing employee engagement, competence, and accuracy; elevating Net Promoter Scores; and increasing customer satisfaction.

What Should an Effective Business Case Include?

1. State the purpose and objective of what is being proposed
2. Provide justification
3. Identify costs and expected ROI
4. List options considered and recommendations
5. Call out risks and benefits
6. Support the argument with facts and numbers

Typical Process for Buying & Implementing a Learning Platform

Issues Surface During Implementation

Although the RFP and evaluation process does a decent job of screening out obviously bad investments you wouldn't want to make, it doesn't allow you to *go deep enough nor sharpen your focus enough* to see some of the critical things you need to experience BEFORE you make the purchase.

Despite best efforts during the RFP and evaluation process, what often ends up happening is that some pretty big risks, issues, and problems surface *during implementation*. As in...

...After you've signed the contract.

...After you've made the purchase.

...After you've promised results.

...After you've already set things in motion in your organization for the rollout.

And you're standing there... professionally exposed and vulnerable. All eyes are on you.

"Ok. You convinced us this is going to be the greatest thing since sliced bread. Let's see it."

And then the bumps start, and the screeching, and things start to slow down and maybe even grind to a halt, just as you're trying to take off and fly.

What you thought would be a smooth 90-day progressive rollout starting small and scaling up, ends up being a 9-month nightmare, for you and your team.

You don't look good, your team doesn't look good, and nobody is getting the results they hoped for.

At this point, you're probably inclined to blame the vendor...

"They mis-sold us on a solution."

...or the product...

"They claimed it could do X, Y, and Z but it really can't."

...or maybe even your evaluation team...

"They should have done a more thorough job during the evaluation."

And you know what, a lot of times—all too often—that's true.

It is the vendor. It is the product. Your evaluation could have been more thorough.

But, just as frequently, it's issues in your own organization that come up—ones you didn't even realize would be a problem.

For example:

- You didn't identify or assign the right people for critical roles like technical administration; first-tier support for end-users in your organization; content management and creation; or reporting.
- You didn't realize how long some of the work to stand up and prepare the system for rollout might take.
- No one ever tested whether or not that library of content—that you were expecting to build the foundation of your curriculum on—would successfully load into and function within the platform and provide the kinds of reports you assumed would be there.

In the end, it's not the product or the vendor, but your readiness as a team—as an organization—to execute new processes and do jobs you've never done before.

After purchase—during implementation and rollout—is not an ideal time to discover these kinds of issues.

A Better Process for Buying & Implementing a Learning Platform

Ok, so here's our alternative. Instead of going straight to a high-stakes business case based on what really comes down to hypothetical assumptions, do these five things:

1. Assemble Your Team
2. Decide What Matters
3. Find Your Solution
4. Conduct a Proof of Concept
5. Then... Make Your Case

Let's break each of these down.



A Better Process for Buying & Implementing a Learning Platform

4. Conduct a Proof of Concept

In this section, we'll cover what a learning platform proof of concept looks like, how you plan it, and how you execute your plan. Then, in the following sections, we'll talk about how to present your results and make your proposal.

First, some key terms.

Most vendors have a few different ways for you to experience their product. Demo, Trial, Proof of Concept, Pilot—what's the difference between all these options?

DEMO	TRIAL	PROOF OF CONCEPT (POC)	PILOT
An overview of product features and capabilities.	An opportunity to use the product in your own environment.	A more formalized version of a trial.	Broader in scope and complexity than a POC.
Includes a live demonstration of tasks, provided by the vendor.	A hands-on experience to validate the features and capabilities pitched by the vendor in the demo.	Product functionality is evaluated against specific use cases.	Typically preceded by a purchase of a limited amount of the product suitable for testing and validation against a sample.
Typically the first time that you're seeing the product in action.	No more than 30 to 60 days.	Clearly defined objectives and expected outcomes.	Conducted with the understanding that the customer has already decided to purchase the product pending a successful pilot.
No more than 1 to 2 hours.		Varies in length depending on the target objectives.	

Explore the Process

Get on the list for our next Rockstar Learning Proof-of-Concept Model Workshop to try out the POC planning process with guidance.

[SIGN UP](#)

A Better Process for Buying & Implementing a Learning Platform

2. Specify Objectives

The next step is to specify objectives for each of your target use cases. As an example, let's look at possible objectives for each of the four target use case examples described above.

Virtual Onboarding

How do you create a meaningful and effective experience for bringing new employees into your organization when everyone is working from home? That's a question many organizations are asking themselves.

If this is your use case, your virtual onboarding POC might include these specific objectives:

- Posting a welcome video into an onboarding learning track facilitated by the learning platform
- Providing a virtual office tour

Alternatively, or maybe in addition to that, you might have a use case for safety training (remember though, you want to focus on one to three use cases, max, per team). The objectives for this use case could include:

- Adding a Fire Safety course to the learning platform
- Enrolling learners in the course
- Having learners take and complete the training

Don't forget to consider where you're sourcing this training from. The Fire Safety course may be one that you've created, one that you've licensed, or one that's part of the off-the-shelf course library of the learning platform you're working with.

Enrolling users might be a manual process, an automated process, or a batch upload. When you look at tracking user completion of the training, you'll want to consider the ability to report on individual users and all users.

Considering these details as you're thinking them through will help you define your specific objectives.

A Better Process for Buying & Implementing a Learning Platform

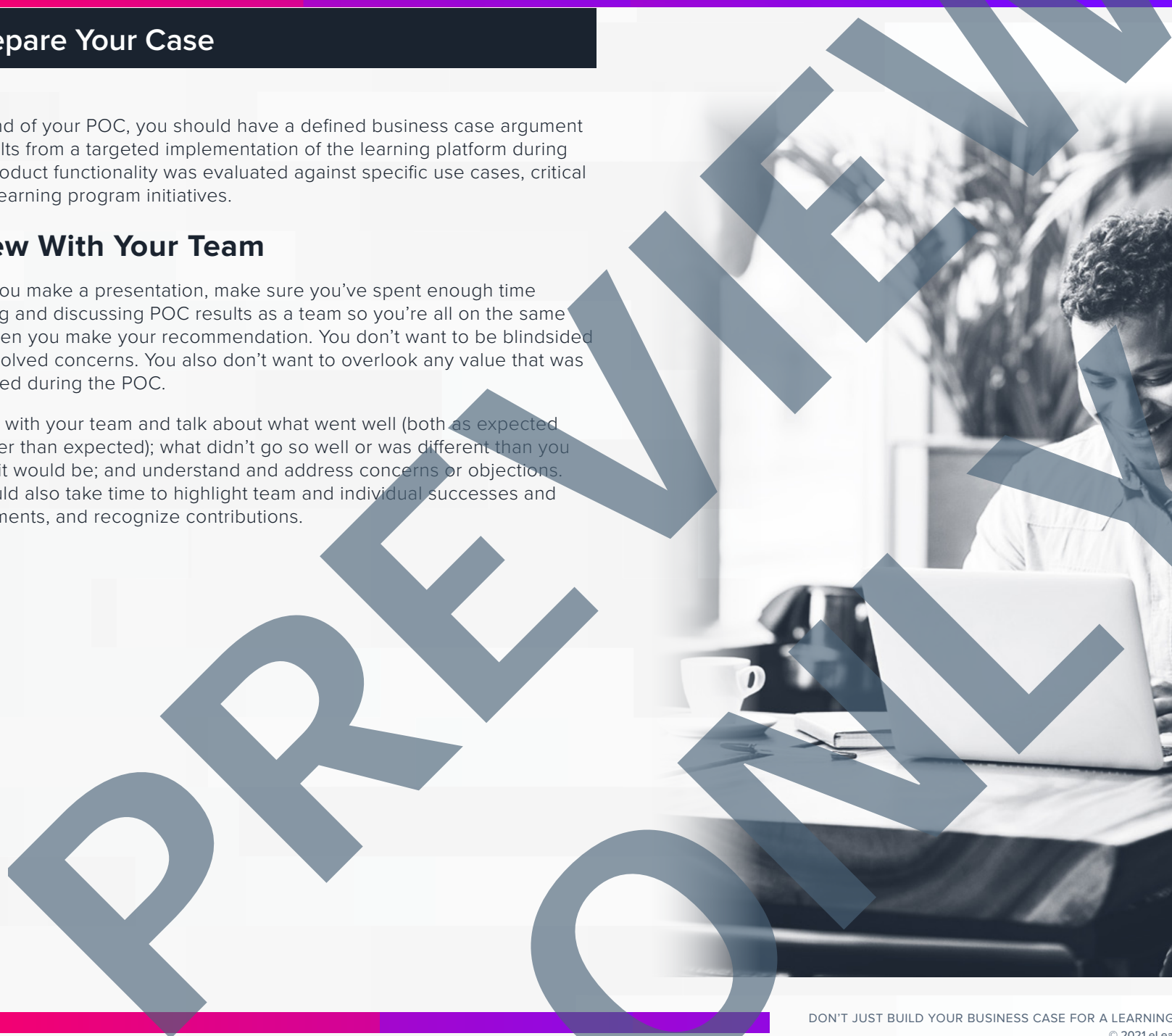
5. Prepare Your Case

At the end of your POC, you should have a defined business case argument and results from a targeted implementation of the learning platform during which product functionality was evaluated against specific use cases, critical to your learning program initiatives.

Review With Your Team

Before you make a presentation, make sure you've spent enough time reviewing and discussing POC results as a team so you're all on the same page when you make your recommendation. You don't want to be blindsided by unresolved concerns. You also don't want to overlook any value that was discovered during the POC.

Sit down with your team and talk about what went well (both as expected and better than expected); what didn't go so well or was different than you thought it would be; and understand and address concerns or objections. You should also take time to highlight team and individual successes and achievements, and recognize contributions.



Present POC Findings in the Context of the Business Case

“In the process of working through this recommendation, we considered a few different options, such as...”

List the solutions you considered.

“Ultimately, we felt a learning platform would be the best solution as it had the following advantages...”

Here you summarize the advantages and state your recommendation to purchase a learning platform.

“We recognize the risk, time, and money that this could cost the company and also the potential benefits of being able to address both our immediate needs and future growth, with regard to compliance, training, and professional development needs in our organization. We have also taken into consideration the following facts and numbers...”

You lay out the numbers.

And then, here is where the POC comes in.

“As a group, we recently conducted a proof-of-concept exercise to validate key assumptions, mitigate risk, and to ensure that the needs of all stakeholders in our company have been considered with this request.”

This is where you talk about the stakeholders who were involved, the use cases you identified for exploration and validation, the specific objectives you were after, and how you measured success. The POC Planning One Sheet can really come in handy for this part.

Then present your findings, ideally with a live demo of what you created in the learning platform, or at least screenshots that provide evidence of what you accomplished. Typically, you’ll only have about 30 minutes to make your business case, present your POC findings, and make your recommendation. You’ll want to allow time for Q&A, so keep your demo to 5 – 10 minutes.

Once you’ve done that, summarize your conclusion by saying something like:

“Having successfully met these criteria in our proof-of-concept exercise, we have a high level of confidence that we will be able to produce the results we are looking for, to get the return on investment we expect, and we’re in agreement as a team that we should move forward.”

Then you open the floor for Q&A, and if you’ve prepared well—and just by going through the POC process you’ll be far better prepared than most—you’ll sail through the rest of the meeting and you’ll be on your way to getting approval for your new learning platform!