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BUILD YOUR BUSINESS CASE:

A TEMPLATE TO QUANTIFY ROI FOR LEARNING AND DEVELOPMENT INVESTMENTS

Featuring example content from SkillDirector's Critical Skills Platform

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ABOUT SKILLDIRECTOR

At SkillDirector, we help organizations create a culture of continuous learning and career growth. Our solutions are built around the concept of **Self-Directed Learning**, enabling employees to take ownership of their development while giving leaders the tools to guide, support, and measure growth at scale.

We offer a suite of tools and services—from competency modeling and behavioral-based self-assessments to integrated development planning and reporting—designed to upskill employees, align learning with strategy, and deliver measurable impact.

One of our core offerings is the **Critical Skills Platform**, a ready-to-deploy solution built around a **future-proof competency model**. It includes self-assessments, personalized learning activities, and skill visibility for managers.

In this template, we use the Critical Skills Platform as an example to help demonstrate how to build a compelling business case for any learning and development initiative. You're encouraged to adapt this content to suit your organization's needs, whether you're pitching SkillDirector's tools or another solution entirely.

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INSTRUCTIONS

This template is designed to help you **build a strong, persuasive business case** for any learning and development investment. Whether you're introducing a new platform, launching a development strategy, or expanding existing programs, this document provides a structure you can easily tailor to your organization's needs.

Throughout the template, we include **sample content based on SkillDirector's Critical Skills Platform**, one of our core offerings. These examples are meant to guide and inspire your thinking—but you're encouraged to **modify any part of the template to align with your specific solution, audience, and goals.**

Each section walks you through the **key elements of a successful business case**: defining the problem, setting goals, estimating ROI, and planning for implementation. Use it as a foundation to secure leadership buy-in and demonstrate the strategic value of developing your people.

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EXECUTIVE SUMMARY

Proposal Overview:

We propose adopting SkillDirector's Critical Skills Platform, a pre-built development system that helps our employees identify skill gaps, receive personalized learning activities, and take ownership of their growth through a structured development plan.

Unlike customizable platforms that require extensive setup, this solution is ready to deploy in days. The platform provides a competency model designed to outlast AI, focused on essential skills that apply to any role across the organization.

Key Benefits:

- *No need to build our own skills framework*

- *Employees self-assess using real behavioral examples*

- *Personalized learning activities are automatically delivered*

- *Development plans are editable and trackable by users*

- *Managers gain access to insights and reporting on team skills*

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CURRENT STATE / PROBLEM STATEMENT

Describe your organization's current state. ***Consider including challenges like:***

- *Lack of visibility into team skill gaps*

- *One-size-fits-all training programs with low engagement*

- *Limited resources to build or maintain a competency framework*

- *Slow onboarding or inconsistent performance*

- *Pressure to develop skills that remain relevant in an AI-driven world*

Example:

We currently lack a centralized, scalable way to assess and develop employee skills. Our training approach is reactive rather than strategic, and we have no system in place to measure development or track progress over time.

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GOALS AND OBJECTIVES

What are you aiming to accomplish by implementing a new development solution?

Examples:

- *Empower employees with ownership over their skill development*

- *Deliver personalized, job-agnostic learning that drives real growth*

- *Gain visibility into where our team excels and where support is needed*

- *Replace manual development processes with an automated solution*

- *Upskill employees to remain competitive in the face of AI-driven change*

Example:

Our goal is to modernize our approach to employee development by providing a scalable, personalized solution that requires no additional HR overhead. With SkillDirector's Critical Skills Platform, we aim to give employees clear, actionable feedback through self-assessment, then guide their growth with relevant learning activities—no manual assignments or guesswork. At the same time, we want managers to have a data-driven view of skills across the team so they can provide more effective coaching and track progress over time.

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BENEFITS AND ROI

Use this table to demonstrate how your solution will provide measurable value.

Benefit	Description	Estimated Impact
Faster Implementation	No customization or development required	Live in days, not months
Personalized Development	Learning activities are automatically assigned based on self-assessment	Increased engagement and faster growth
Skill Visibility	Managers see team-wide skill levels and gaps	Better decision-making and targeted coaching
Future-Proof Skills	Focus on skills designed to stay relevant in the AI era	Increased workforce agility
Lower Training Waste	Employees focus only on what they need	Higher ROI from L&D investments

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BUDGET ESTIMATE

Instructions:

Use this table to estimate costs for platform access and any optional services. Keep it simple—ballpark numbers are fine for early planning.

Item	Cost Estimate	Notes
Platform Subscription	$[Insert]	Includes access to the full competency model and reporting tools

STAKEHOLDERS AND APPROVALS

Instructions:

List key decision-makers and influencers for this initiative. Note their current level of support and any concerns you may need to address to move the project forward.

Name / Role	Support Level	Concerns to Address
[Leader 1]	Supportive / Neutral / Unsure	ROI, relevance to business goals
[HR / L&D]	Supportive / Neutral / Unsure	Implementation ease, reporting needs
[Team Managers]	Supportive / Neutral / Unsure	How it helps team growth and productivity

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IMPLEMENTATION PLAN

Since the platform is pre-built, implementation is straightforward:

Proposed Steps:

1.) *Select a pilot group or team*

2.) *Provide access to the platform*

3.) *Employees complete self-assessments*

4.) *Personalized learning plans are generated automatically*

5.) *Managers begin reviewing insights and reports*

6.) *Track progress and iterate as needed*

Estimated Timeline:

Live within 7–14 days from agreement

NEXT STEPS

This business case template is built to help you clearly communicate the value of your learning and development initiative. It's structured to guide leadership through the problem, your proposed solution, expected outcomes, and return on investment.

While we've used SkillDirector's Critical Skills Platform as an example throughout, you can modify any section to reflect the solution that best fits your organization. Use this as a foundation to build buy-in, start conversations, and gain momentum for driving skill development.

Make It Actionable

Download the Fillable Business Case Template
Use this editable version to build your own business case and start gaining stakeholder buy-in today.

Schedule a Call
Book time directly with our team to explore how the platform fits your needs.
skilldirector.com/demo

Email Us
Have questions or want more information? Reach out any time.
SDLESales@SkillDirector.com

Visit Our Website
Learn more about the platform, how it works, and what sets it apart.
www.skilldirector.com

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