

# How to Create a Blended Learning Internal Proposal / Business Case

10 Steps to help build your business case



Compiled by Andrew Parker  
Solutions Training & Advisory Ltd



[www.solutionstraining.co.uk](http://www.solutionstraining.co.uk)

Tel 01932 880147

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## Introduction

The goal of this paper is to help you create an internal proposal that forms a robust business case which results in funding for your learning initiative.

To do this, the report provides you with a well-designed structure, comprehensive guidelines, and practical tools to help you build an effective business case. As a learning professional, you are probably already convinced of the merits of training within your organisation. Now is the time to get everyone else on board. This paper has been designed to help you plan, communicate, and sell your proposed learning initiative to key decision-makers within your organisation. A reality of life within all organisations is that a limited amount of funds are available and must be allocated to many divisions and projects. You may be convinced of the critical importance of your proposed training initiative. You may also be certain that your training initiative will have a substantial positive impact on your organisation's operations, efficiency, and costs. But, you need to be aware that others within your organisation are just as convinced that available funds should be allocated to their project instead of yours.

***“Winning over all your stakeholders - getting everyone else on board?”***

***“It’s critical to align your training plan to your business strategy”***

## Blended Learning – Why?

“People are not single-method learners!” says e-learning guru Elliott Masie (cited in Rossett, 2002). Indeed, while specific “blended” offerings differ, industry consensus continues to point to the use of multiple modes for learning. Masie puts it simply: “We are, as a species, blended learners.”

***“We are, as a species, blended learners.”***  
- Elliot Masie

If this is true—that people perform better when they have a mix of modalities and methods of learning—what defines the most effective mix? Will any combination of modalities do, or is there an “optimum blend,” a “sweet spot” to blended learning? In short, blended learning should be designed to fit your own specific organisational and learning needs. This paper points towards the need for 10 consideration areas when building an internal business case for the introduction of blended learning.

## The Business Case

Before we start, we need to ask the question: what is the business case for blended learning? In a 2001 IDC study, Julian and Boone found, “The importance of a blended approach to learning is that it ensures the widest possible impact of a learning experience and thus ensures...that the organisation optimises productivity and delivers value to its customers” (Julian and Boone 2001).

***“Balance the scales”***  
- understand and articulate the benefits at the same time as talking about the costs.

Some organisations will be driven to make decisions on blended learning through pure financial return on investment criteria, others through the imperative to build strategic organisational competence, others through statutory and mandatory compliance demands. Most organisations recognise their people as their most important asset and that skills development is paramount to ongoing and future survival and success. In most cases cost and learning effectiveness are the key drivers within a blended learning business case.

## 10 benefits to seek from a blended learning approach

*“Blended learning is a business performance improvement tool, not a training tool.”*

Remember that the ultimate purpose of elearning is not to reduce the cost of training, but to drive business results. If you cannot identify the business goal of a blended learning program, you should ask why you are doing it in the first place. eLearning is a business performance improvement tool, not a training tool.

Having established that blended learning is good for business, let’s take a look at some of the benefits that it should bring when properly implemented.

*“Seek out and fully articulate all the benefits”*

1. Retains front line staff in the front line to protect service levels
2. Avoids manpower backfilling when taking classroom training.
3. Reduces your classroom training costs – typically reductions of 25%-80%
4. Provides theory based learning to learners any time, any pace, any place.
5. Enables consistent training content across the organisation, customised to your organisational needs, easily updated and maintained.
6. Reducing CO2 emissions by reducing staff travel to a training centres.
7. Centralises and automates the recording, assessment, compliance reporting and measures of training effectiveness.
8. Provides learners the opportunity to gain the underpinning knowledge in their own time and at their own pace and still be objectively assessed.
9. Releases your highly skilled team of specialist trainers to further higher value practical training activity.
10. Enables classroom training to be more valuable – to focus on the most important areas – the practical application of the theory

*“A Blend of Benefits - Not Just One”*

## 10 content steps to include in a blended learning proposal

There is no one way to present a good business case. There is best practice and proven strategies that have worked successfully in many organisations. Generally most follow the principals of the 10 steps outlined below. There should always be a strategic positioning to your business case as well as the operational plan. Strategic thinkers are also key decision makers in your organisation and by answering their concerns you will not only win their approval, demonstrate empathy to their direction, but also you will enlist their support.

*“I know it’s the right way forward but how do I win budget for blended learning?”*

- Step 1** Define the Business Need
- Step 2** Define the Learning Strategy
- Step 3** Define the Learning Options & Alternatives
- Step 4** Define an all departments Functional Requirements Specification
- Step 5** Define the Return on Investment – detail the costs and benefits
- Step 6** Define your Technical Strategy
- Step 7** Define the LMS & Content Sourcing Strategy – internal or external
- Step 8** Define Implementation and Operation plans
- Step 9** Define the Risks and Challenges
- Step 10** Define a compelling Executive Summary

*Define the  
Business Need*

## Step 1 Define the Business Need

Increasingly in today's world training professionals need to make a convincing business case for training if they are to see their initiatives valued and embraced by decision makers. The business need section needs to:-

- *Align training with the business strategy*
- *Prove the business impact of training*
- *Illustrate the measure of learning effectiveness and return on investment*

This section would often cover:

- I. A Background Statement
- II. The Case for Change Statement
- III. The Current Learning Challenge
- IV. Evidencing alignment and fit to the organisations Strategic Direction
- V. Alternative Learning Development Options – pro's and cons

*Define the  
Learning Strategy*

## Step 2 Define the Learning Strategy

- I. Establish a definition of Blended Learning as it relates to your organisation.
- II. Develop a vision statement for your blended learning strategy
- III. Define your key learning goals and objectives
- IV. Define your desired learning methodology options
  - a) Scenario based learning
  - b) Game based learning
  - c) Simulation based learning
  - d) Emulating based learning
  - e) Research based learning
  - f) Learning from real events
- V. Define a learner centric motivation design model that determines the process of arranging resources and procedures to bring about changes in learner motivation for your online content.
- VI. Define the design strategy
  - a) Statement of explicit learning principles
  - b) Statement of design alignment to organisations culture and beliefs
  - c) Statement of learner assessment approach / strategy
  - d) Statement of learning levels
- VII. Define the learner the relevant groups for blended learning
- VIII. Identify the scope of courses, syllabus and content for eligibility to blended learning conversion / adoption – the potential e-catalogue.
- IX. Identify the blended mix of courses to all the targeted audiences groups, illustrating the duration mix of online and classroom expectations.
- X. Prioritise the roll out of blended courses and define initial priorities.

### Step 3 Define the Learning Options & Alternatives

*Define the Learning Options & Alternatives*

- I. Identify alternative learning development options
- II. Objectively compare the advantages and disadvantages of all the options
- III. Recommend best way forward with comparison against status quo

### Step 4 Define an all departments Functional Requirements Specification

*Define Functional Requirements Specification*

- I. Identify all stakeholders in a blended learning initiative
- II. Present a “Needs Statement” returned from all stakeholders
- III. Analyse and list all needs into a Requirement Specification that show how these are satisfied / managed against a final proposed solution checklist.

*Define Return on Investment*

### Step 5 Define the Return on Investment – detail the costs and benefits

This section provides the case for the investment; it may use a variety of ways to make the argument for the case.

- I. List the key benefits - strategic, operational, tangible, intangible, financial, non financial.
- II. Present the full costs of delivering the proposal - include the internal costs and external costs – the internal costs are often much higher than originally understood and omitted.
- III. Adopt and present using any internally recognised investment tools,
  - a. how soon will the investment pay itself back,
  - b. what % return will come from the initial investment
- IV. Present a framework for investment effectiveness criteria: rating from Zero, Poor, Fair, Good Excellent:
  - a. Is it customer / service user / patient centred?
  - b. Is it clearly linked to corporate objectives and business plans?
  - c. Are the objectives SMART – specific, measurable, attainable, relevant, time bound?
  - d. Is there a thorough financial and general risk assessment?
  - e. Is there evidence that the desired outcome will be achieved?
  - f. Assess the level of stakeholder commitment?
- V. Ensuring that your LMS offers “Ongoing Learner Feedback Reporting” will provide a continuous improvement cycle for your investment and keep the learning effectiveness measured and connected with the learner audience.

*Define your technical strategy*

**Step 6 Define your Technical Strategy**

This section should set out the formal technical specification for the e learning element of the LMS and courses. It is designed to ensure there is a shared understanding of the product specification, functionality, and access points. The strategy formally identifies technical product strategies for four key areas: Instructional Design, Visual Design, Software Architecture, and Maintenance and Upgrade.

- I. Define the Instructional design strategy
- II. Define the Visual design strategy
- III. Outline the access strategy for access to the online courses
- IV. Review all learner groups for access capability
- V. Identify alternative internet access options for sub groups
  - a. Off line player
  - b. CD ROM ,DVD, Memory stick
  - c. Paper based
  - d. Classroom facilitation
- VI. Create Learning Management System strategy statement
- VII. Selection of LMS platform configuration and development plan
- VIII. Define SCORM compliance strategy – version 1.2 or 2004
- IX. E learning course output formats strategy – Flash, HTML, Silverlight
- X. Self authoring tool sets strategy
- XI. External course procurement strategy

*Define the build and sourcing procurement approach – internal or external?*

**Step 7 Define the LMS & Content Sourcing Strategy – internal or external**

Seek a solution that guarantees a successful implementation for your organisation, one that fits your sector, your needs, your culture and your learning strategy. Ensure there is adequate assistance and guidance so that the programme has sufficient leadership, motivation, continuity, project planning/control and “organisational buy-in”. The appointment of a long term strategic partner with sector knowledge can be crucial to securing your programmes success.

- I. Define strategy , scope, functionality requirements for LMS
- II. Define LMS sourcing and procurement strategy
- III. Size and scope the delivery time for content and LMS build requirement
- IV. Analyse advantages / disadvantages of a strategic outsource partnering model.
- V. List which courses are available on the market and which courses need to be built.
- VI. Define which courses to be built internally and externally
- VII. Determine the authoring tools, internal resource and capability
- VIII. Determine the preferred supplier/ suppliers for content
- IX. Determine the licensing versus content ownership approach
- X. Define the backup strategy - internally and externally

## Step 8 Define Implementation and Operation plans

### *Define the plans for Implementation and Operation*

The E-Learning element of new blended learning initiatives will be implemented in stages. The details of these stages should be detailed in a pre-implementation study document when specific implementation dates are better known. To ensure a successful and effective blended learning implementation you should set out a list of activities to manage the training before, during and after implementation.

#### Before the Training...

- I. Build a communication plan for all strategic stakeholders
- II. Plan clear communication to all employees about the goals of the training; and its impact on their own development objectives.
- III. Provide a plan for proactive encouragement for learners to gain the computer skills they need to successfully take an e-learning program.
- IV. Design pre- and post-testing measures; or other systems to enable evaluation of the training program upon completion.
- V. Plan for an administrative system to assist with tasks such as registration, tracking and addressing learner issues via helpdesk.
- VI. Provision for learners' special needs, such as reading problems and physical or mental challenges are addressed through the choice of media or supplemental assistance; to ensure adherence to the accessibility (W3C) guidelines.

#### During the training...

- I. Plan for an easily accessible Helpdesk for learners.
- II. Plan to have supervisors trained to be coaches.
- III. Provision for learners to have an assigned area (training room or their own desk) to take the e-learning course that is free from distractions and interruptions.
- IV. Plan and agree a pattern with departmental heads and communicate to relevant user base the allocation of E-learning time during the work day.
- V. Plan and promote and communicate the organisational culture is to support continuous learning.

#### After the training...

- I. Provision to evaluate learners on an individual level; issue certificates and acknowledge their achievements at departmental and organisational levels.
- II. Promote and communicate how individuals training impacts on your the service performance and key results areas and how this is assessed.
- III. Plan to implement a mechanism to reinforce the learning once the training is over.
- IV. Plan to ensure that training courses are continually updated to meet current practice and regulatory requirement as appropriate.
- V. Plan to ensure that training is assessed annually to meet existing and new training needs analysis.

## Step 9 Define the Risks and Challenges

### *Define the Risks and Challenges*

Conduct and present a review to assess the risks of the programme, showing the rating level of risk and mitigation strategies, plans or fall backs. Blended learning strategies do fail, but a well structured plan can work to protect you and your investment.

- I. Identify, analyse and score your risk areas
- II. Illustrate the potential impact of the risk
- III. Establish mitigation / de-risking plans
- IV. Provide a equality impact assessment analysis for all groups of individuals

## Step 10 Define a compelling Executive Summary

### *Most often the most important part....*

### *Create a compelling Executive Summary*

Senior management are busy people and need help to process decisions. A well written Executive Summary rapidly demonstrates to the reader:- clear, structured, strategic and operational balanced thinking. It should provide confidence that the author has thought through the entire proposal and generated an objective and rationalised proposal. Poorly presented or incomplete, it can very often kill the proposal immediately. Always get someone more detached than you to read and critique it!

- I. Make your proposal compelling
- II. Keep it objective and business like
- III. Make it short 1- 3 pages at most
- IV. Positioning it strategically
- V. Define what you mean by blended learning
- VI. Define the purpose of the document
- VII. Explain why you must invest now
- VIII. Outline what you need -LMS courses etc
- IX. The current and future scope for blended learning in the organisation
- X. The key business case headline arguments incl the cost benefit summary
- XI. A short overall summary statement

END

For more information or advice please feel free to contact on  
Tel 01932 880147