

Building a business case for an online learning platform

About this document

Welcome! This guide for building a business case for an online learning platform comprises two parts.

1. The first part is a 6-step instructional guide designed to help you build your business case and get internal approval for an online learning platform.
2. The second part is an example of how a fictional company, ACME Co., put this framework to use to get approval for an online learning platform to optimise the organisation's induction processes. The purpose of part two is to show you the framework in action, but feel free to copy and paste any of the wording into your business case if it serves your needs.

Step 1 - Define the problem

Defining the 'problem' (which can also be a challenge or opportunity) you are trying to overcome is perhaps the most critical part of building a business case. If you are unable to identify and clearly describe the challenge or opportunity you are trying to address, you will have little chance of receiving buy-in for your project.

A pragmatic way to approach defining your problem is to look at it in three stages.

1. Identify and justify the need

Here you want to state the problem that you are trying to overcome as clearly as possible. It is crucial to focus on the heart of the problem rather than jumping to a solution. Justifying the problem and relating it to your back organisation will help align your stakeholders and increase your chance of getting approval. Try to link how this exercise will help the organisation achieve its strategic objects or avoid a significant loss.

2. What is the desired outcome?

Try to quantify the outcome, both qualitatively and quantitatively. Use phrases like "*by overcoming this challenge, we will achieve x, which means the company delivers on goal y*". It is worth introducing how success is measured at this point.

3. Who stands to benefit, and how?

Explain what solving this challenge will mean for your staff, the management team, your customers, the reputation of your organisation and anyone else that might be impacted by the project.

Step 2 - Explore potential solutions

This step is about showing that you've done your homework. Explaining that you have looked at the problem broadly and have explored multiple approaches to solving it is the aim of this stage.

To that end, comparing three very similar technology providers suggests that you have not looked outside the box to overcome the challenge.

Your management team is looking to address their due diligence. They want to be confident that a rigorous exploration of possible solutions has taken place. It's your job to give them that confidence.

Look to compare several tech providers, but look at providers that approach the problem in different ways. Perhaps there is an option to address the situation internally or through face-to-face engagement - if so, explore that. Even if these potential solutions don't end up working out, your investigation of them suggests you've left no stone uncovered.

From a feasibility point of view, it's worth introducing the costs, implementation hurdles and other vital aspects of each solution here. These points only need to be addressed at a high-level at this stage for the sake of comparison.

Step 3 - Recommend a preferred solution

Based on the information you've provided above, you are now in a position to recommend the solution that you think will best address the problems outlined in Stage 1. Explain how the solution you are proposing is superior to other alternatives by highlighting its ability to solve the challenge you identified. You can also provide more detail on pricing, implementation, and any other areas you feel will strengthen your case for the preferred solution.

It's critical at this stage to link your recommendation back to the problem you're trying to solve and the organisational goals you're trying to achieve. If you frame your solution in a way that is relevant to solving the problem, you will go a long way to getting buy-in for your approach. Try and use specific examples and make your recommendation as contextual as possible to your organisation.

Step 4 - Explain the pricing of the preferred solution

At this step, you dive into the pricing details of your preferred solution. Pricing is a crucial element of any business case, so the more detail and transparency you can provide here, the better.

Pricing must be addressed from a total cost of ownership perspective. It's all too easy with SaaS platforms to simply compare subscription rates as a means of understanding pricing, but the reality subscription rates are only part of the total cost picture.

You need to look at the costs associated with the platform in the medium and longer-term, a concept called *total cost of ownership*. Some of the questions you should have answers to at this stage include:

- What are the costs associated with implementation?
- How will we create training? What does it take to edit training?
- Do our staff require training to use this solution?

Even the seemingly simple task of comparing subscription rates can become complicated. Discounts may apply for increased usage. Some organisations charge for stored users (meaning you are charged per user whether they access your system or not), others, like Tribal Habits, charge only for active users.

Try to make your pricing explanation as clear as possible. Compare 'apples with apples' where you can, even if that means generating a usage scenario(s) and calculating the total cost of ownership over 1-3 years for each alternative.

Your management team will be looking to understand its total cost commitment to the solution you are suggesting. Make it easy for them to understand what you're putting forward, show why it's superior to the alternatives and be prepared for questions!

Step 5 - Describe the implementation of the preferred solution

As part of the due diligence process, your management team needs to understand how your new solution will be implemented in the organisation.

There is a lot of variation between technology platforms here - from simple plug and play solutions (like Tribal Habits), to more extensive enterprise solutions that require significant integration and IT support to enable their rollout.

An excellent way to approach this is to provide a timeline of events and milestones. This way, your management team has visibility of what to expect and when to expect it. It also pays to highlight risks and potential disruptions at this stage.

Similar to the pricing stage, your management team will likely want to drill into this part of your proposal. So you need to know the details. Examples of the question you should have answers for include:

- What training will be required by Admins and general staff?
- Do we need new hires to manage the platform?
- Who will be responsible for administering the system? Who is the 'product owner'?
- What impact will this project have on other projects underway and the day-to-day running of our organisation?

Step 6 - Provide your impression of the preferred solution

It's time to get personal!

By now, you will have conducted a trial of the platform you are recommending. If you haven't, stop writing this business case and start your trial! This section is an opportunity for you to provide details of your personal experience with the platform, how you think it fits into your organisation and specifically, how it solves the identified business problem.

Try to provide real-world evidence of your experience in the platform as this will help bring it life for your management team. Some areas to focus on could be:

- Your interactions with the support team
- Ease of use
- Setup time
- Training requirements
- Ability to leverage current training assets
- The ease with which training can be created
- Reporting capabilities

To close your business case, succinctly summarise your key points and provide your final recommendation on how the proposed solutions will solve the identified business problem.

Need help?

If you require any assistance with creating a business case to help support your organisation in its consideration of Tribal Habits, please reach to us at hello@tribalhabits.com. We'd be happy to help discuss your objectives, develop optimised solutions and pricing ideas, and ensure that your organisation is ready for a successful launch of its new learning platform.

ACME Co: Moving to online learning

The challenge

ACME Co. is growing rapidly with staff numbers tripling (to 250) in the last year. The growth of our business presents many opportunities but also some challenges.

We have received feedback from new starters that the way we bring new employees into the business could be improved. The biggest challenge we face in this space is consistency. Some staff have indicated that their induction into our organisation has been excellent. At the same time, others suggest that they have faced challenges, such as difficulties in understanding our product range and knowing where to go to get help.

The first days and weeks of a new employee's tenure at ACME Co. go a long way to dictating their happiness and success within our organisation. Given that customer service and product knowledge is a pillar that we've built our business around, to achieve our mission of 'being the product experts' it is critical that our staff gain expert-level knowledge of our products as soon as possible.

I believe we need a structured process to bring new starters into our organisation in a consistent, standardised manner ensuring they receive the information required to succeed.

Optimising our induction processes will increase staff happiness, reduce the time to productivity of new starters, remove the training burden on current staff, ensure service levels and product knowledge is standard across our sites, lead to improved customer satisfaction, and ultimately drive more sales.

Potential solutions

I have spent the past two months exploring solutions to improve our induction processes. Through the process, I identified three potential solutions to overcome our induction challenge.

1. Structured face-to-face training
2. Off-the-shelf online induction training
3. Customised online induction training

Face-to-face certainly has its benefits in creating a connection between employees, but it requires a lot of staff time to train our new starters. This is the process that we've followed to date, and we've seen it fall down several times when we get busy, resulting in inconsistent training of new starters.

I have investigated three providers of off-the-shelf induction training: I do not believe this is a viable option for us. While professionally packaged and always available through an online portal, off-the-shelf induction training is generic in its nature, and will not help us achieve our goal of providing staff with product-specific knowledge or giving them insights into how our organisation operates.

In contrast, customised online learning presents an excellent opportunity for our organisation. By creating our induction training, we can directly engage with new starters and ensure they receive all the information required to succeed in our organisation. We can make this information available to them 24/7 through an online platform, removing the need to schedule training and pull other members out of their job to run the sessions. I have investigated three potential providers in this area and have uncovered that the cost and ability to create training is the most significant variable at play here. This is detailed further below.

The preferred solution

After reviewing the options outlined above, I believe that creating customised, online induction training through Tribal Habits is the best option for ACME Co.

Tribal Habits provides a complete eLearning authoring tool, branded portal and unlimited content creation.

Tribal Habits training can be created so that it is entirely interactive. From narration, images, hotspots, quizzes and assessments, reflection and insights plus many more. The platform also lets you host videos which dynamically adjust to the specifications of each learner's device when they do the training, in order to ensure they get the best video quality each time.

Some key features of Tribal Habits include personalised creation of training where you can create entire training modules yourself, combined with the use of their training library which has pre-designed training modules including compliance training which we can use straight away and modify where needed. They also offer assistance to bring any current training across onto the platform and assist in digitising what you have into interactive learning experiences. Tribal Habits also uses a modern interface, which results in ease of use and navigation for learners and content creators. You can create complete training modules, one-page information articles or learning pathways (which combine multiple modules and articles) that can be job-specific or general.

In terms of data, Tribal Habits has an easy to use administration section that allows you to enrol staff individually or in bulk, track progress, track scoring and assessments, time spent and much more data that can be utilised to record training as per requirements, but also provide insight to the practice team on where we might need to tweak the training, or in what areas we can help coach in order to better the practice of individuals and the organisation.

Tribal Habits can also integrate with pre-existing technology that we currently use, such as Prezi. Tribal Habits can also integrate and link with Learning Management Systems (LMS) should we need to use an LMS in the future.

We would also be able to effectively track webinars that we hold as practice development sessions, by embedding Zoom (or any other video conferencing tool similar) into Tribal Habits. At present, all that is needed is to create a one-page "article" with Zoom embedded, however, Tribal Habits will also be releasing an event feature which will enable tracking of people attending these webinars, without the need to set up an "article". I would note, that it would only take less than 10 minutes to set up an "article" anyway, and you would then be able to record the Zoom webinar and save it into the article for people to replay or for those who weren't able to attend.

Tribal Habits Pricing

Tribal Habits is an affordable option when I have compared similar systems. In fact, it was the cheapest option on the market that was able to tick all the boxes we require.

A critical point that requires consideration when pricing a training platform is the total cost of ownership. The other platforms I reviewed required third party content creation which comes with a high cost. Changes, updates and alteration to training also require substantial change fees.

The costs detailed below are the total costs associated with Tribal Habits. There are no implementation costs, no setup fees and because we aren't reliant on external content creators, no creation and update costs.



Tribal Habits utilises two pricing options, a monthly plan or an annual plan. They also have offered not-for-profit pricing for us, which provides a 10% discount.

Monthly plan option

\$4.50 + GST per user each month (usually \$5.00 + GST per user). This requires a credit card to be in the system and will be charged on the 1st of each month for active users in the previous month (min 5 active users per month).

Annual plan option

\$4050 + GST per annum, payable in advance (usually \$4500 + GST per annum) – includes up to 100 active users per month. If you go over 100 users in a calendar month, you are charged for the incremental overrun at a rate of \$3.38 + GST per user (plus a \$25 admin fee). They also have plans for 150 and 200 active users per month.

Implementing Tribal Habits

I have completed a 14-day trial period of Tribal Habits. Should we elected to go ahead with this solution, our trial portal will become our live portal. This means most of the initial setup work for our portal is already complete. In fact, the workload to implement Tribal Habits is far less than other online platforms and can be completed in minutes.

We can import (and update) our users via spreadsheet or enabled single-sign-on to auto-create new users. In either case, establishing initial users takes minutes. Most of the work will be in preparing a spreadsheet of our users to upload.

Importing topics from our libraries and establishing initial pathways or enrolments takes minutes. Topics are imported in seconds, and it takes less than a minute to activate due dates, notifications and reminders of each topic.

When it comes to creating our own online training, Tribal Habits will be faster than any other alternative. The platform has template topics, guided processes, pre-formatted content, built-in feedback and free human reviews. We'll be able to shortcut our paper-training into interactive online modules in hours or days - not weeks or months.

Experience with Tribal Habits

I was able to speak with Jordan from Tribal Habits during my trial and get a rundown of the product.

I have been able to play with the platform through a free trial offered by Tribal Habits and have begun looking to set up training. It is an easy to use platform and does not take any longer to create than it would to develop traditional training through PowerPoint or Prezi. There are many options to choose from to make training interactive, and it tracks much more data than what we can monitor ourselves right now offline. I have created numerous induction training topics already in Tribal Habits, and I have no previous experience in online training creation. The topics are engaging, interactive and have been well received by those I've shared them with internally.

Having a good quality, Australian-owned platform where all support is provided within Australia, allows us to add more tools to our practice development strategy. It also lets us spend more time working practically with teams and staff to develop practices, behaviour and attitudes, while they are still able to access the knowledge.



Competence in practice comes from three elements: knowledge, behaviour and attitudes. Traditional training methods focus on knowledge, and mean that we have less time to spend on behaviour and attitude, which is the key in actually changing practices. Often we just hope by providing knowledge, people will automatically adjust their practice, but this is not the case. Being able to have access to that same knowledge, online and interactively, and then utilising the practice team to work with teams and staff will enable us to have the time to build and enable change in practice.

I recommend that ACME Co. invests in an online training tool, with the preference being for Tribal Habits. I believe it is critical to improving we induct new starters and to our ultimate success as a business.