

The LMS Business Case Toolkit

Everything you need to win internal approval and get your new LMS funded.

Ready to Customize | **Built for LMS Managers** | **Plan Around Your Deadline**

Most enterprise LMS projects take 12–18 months. If you haven't started, now is the time.

What's in This Toolkit

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The narrative document your leadership will actually read.

LMS Budget Worksheet 02
Honest math on what a new LMS costs, and what it saves.

Executive Presentation Deck 03
A ready-to-customize deck for your leadership meeting.

Implementation Timeline Template 04
Phase-by-phase view with a sample 12-month project plan.

Stakeholder Alignment Worksheet 05
Map influence, support and concerns for every key player.

Executive Talking Points Sheet 06
One-page cheat sheet for the questions executives always ask.

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The conversation executives actually care about.

Bonus: How to Have the Conversation B
Who to talk to first, and in what order.

COMPONENT

01

Executive Brief Template

Designed to be read by a VP, CHRO or CFO who has limited time and patience for LMS jargon.

How to use this: Fill in the bracketed fields. Delete any sections that don't apply. Aim to keep the final document under 3 pages. Attach the Budget Worksheet as an appendix.



Executive Summary

The question is not whether to act, but when and how.

[Organization Name] currently uses [current LMS / current approach] to deliver and track training for [X] employees. [Describe the trigger in one sentence: our contract renews on [date]; our vendor has announced end-of-life for the platform; our compliance audit on [date] exposed reporting gaps; we are consolidating LMSs after an acquisition; we have outgrown spreadsheets and manual tracking.] We need a decision by [decision deadline] to avoid [the consequence].

1. Current Situation

Our Decision Deadline

[Name the date that forces this decision and what happens after it. Examples:]

- Our contract auto-renews for [X] years on [date] unless we give notice by [date]
- Our vendor will stop providing security updates and support on [date]
- Our next compliance audit is [date], and we cannot currently produce [specific records or reports] on demand
- [Business event, such as an acquisition or expansion] requires one platform for [X] new employees by [date]

Risks of Delaying Action

⚠ Every month we wait comes out of the implementation window, not the deadline. The deadline does not move.

Risk	Likelihood if Delayed	Impact
Missed compliance or audit requirements	High	Critical
Rushed go-live with data errors	High	High
Loss or corruption of historical learning records	Medium	High
Locked into another multi-year renewal on a platform we want to leave	Medium	High
Budget spike from emergency procurement	High	Medium

Current Challenges

Beyond the deadline, our organization currently faces the following challenges with [current LMS / current approach]:

- [Describe challenge 1, e.g., limited reporting capabilities]
- [Describe challenge 2, e.g., poor mobile experience]
- [Describe challenge 3, e.g., high administrative overhead]

2. Business Impact

Compliance Risk

We currently hold [X] years of compliance records covering [Y] employees across [list regulated training areas]. These records must remain preserved, accessible and auditable. Today, [describe what is uncertain or difficult: access, export capability, audit trail integrity, time to produce records].

Administrative Inefficiency

[Describe manual workarounds, duplicate systems or staff time consumed by current limitations. Quantify if possible: "Our LMS team spends approximately [X] hours per week on manual processes that a modern platform would automate."]

Reporting Limitations

Leadership currently cannot see [name the specific gaps: compliance status by business unit, skill gaps, program effectiveness, learner progress]. Producing [name a specific report] currently takes [X] hours of manual work and is available [monthly / quarterly / on request only]. This limits our ability to [describe the decision the business cannot make well today].

Total Cost of the Current Setup

Our license fee is only part of what we spend. Including [support, add-on modules, workaround tools, custom development and staff time], our current setup costs approximately $[X] per year. See the Budget Worksheet, Section C.

3. Recommended Approach

Selected Vendor: [Vendor Name]

After evaluating [X] vendors against our defined requirements, we recommend [Vendor Name] based on:

- Proven enterprise implementation and data migration experience



- [Key capability 1 relevant to your organization]
- [Key capability 2 relevant to your organization]
- Strong compliance and certification management
- Dedicated implementation support model

Implementation Timeline

Enterprise LMS implementations typically run 12 to 18 months depending on integration complexity, user population and compliance requirements. See Component 04 for full phase detail and a sample 12-month plan.

Phase	Duration	Target Dates	Key Output
Internal Audit & Alignment	Months 1–2	[Start – End]	Team assembled; environment mapped
Define Requirements	Months 2–4	[Start – End]	Requirements doc; vendor criteria
Vendor Evaluation & Selection	Months 4–6	[Start – End]	Vendor selected; contract signed
Planning, Data Prep & Configuration	Months 6–10	[Start – End]	Data cleaned; environment configured
Migration, Testing & Launch	Months 10–14	[Start – End]	Go-live; hypercare complete
Stabilization & Optimization	Months 15–18	[Start – End]	Legacy system retired; roadmap set

Budget Estimate

See the attached Budget Worksheet for full detail. Summary:

- Total one-time investment: $[X]
- Ongoing annual cost: $[X]
- Estimated annual savings: $[X]
- Projected ROI breakeven: [X] months



4. Expected Benefits

Benefit	Description	Estimated Impact
Reduced compliance risk	Preserved records, audit-ready reporting	[Quantify if possible]
Improved efficiency	Automated workflows, fewer manual processes	[Hours/year saved]
Better learner experience	Modern UX, mobile access, personalized paths	[Completion rate improvement]
Consolidated systems	Eliminate parallel tools and integrations	[Cost savings]

5. Decision Required

We are requesting approval to proceed with vendor selection and contract negotiation, with an initial budget of $[X] for [Phase 1 / full project]. A delayed decision directly compresses our implementation timeline and increases project risk.

Specifically, we need:

- Executive sponsorship from [Name/Role]
- Budget approval of $[X] for [scope]
- Authorization to engage vendors for RFP/demo process
- Commitment to provide [internal resources] for the project team

Prepared by:

Your Name: _____ Date: _____

Questions: _____

_____

_____



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02

LMS Budget Worksheet



Most organizations have no framework for estimating LMS project costs. This worksheet forces honest math on both sides of the ledger: what the new platform will cost, and what your current setup is already costing you.

How to use this: Fill in your estimates. Use ranges if exact figures aren't available yet. A rough number is better than a blank. Attach this to your Executive Brief as an appendix.

Section A: One-Time Implementation Costs

Cost Item	Your Estimate	Notes
Licensing & Implementation		
New LMS licensing (Year 1)	e.g., $80,000	
Implementation / setup fees	e.g., $25,000	
Professional services / consulting	e.g., $15,000	
Data & Content		
Data migration (records, transcripts, certs)	e.g., $10,000	
Content migration (SCORM, video, docs)	e.g., $8,000	
Integrations (HRIS, SSO, etc.)	e.g., $12,000	
People & Training		
Administrator training	e.g., $3,000	
Change management / communications	e.g., $5,000	
Internal project team time (est. hours × rate)	e.g., $20,000	
TOTAL ONE-TIME COST		**$_____**

Section B: Ongoing Annual Costs

Cost Item	Your Estimate	Notes
New LMS annual license	e.g., $75,000	
Vendor support / success services	e.g., $5,000	
Internal administration (staff time)	e.g., $30,000	
Integration maintenance	e.g., $3,000	
Content maintenance & updates	e.g., $8,000	
TOTAL ANNUAL COST (New Platform)		**$_____**

Section C: Current Cost Baseline

What are you paying today? This is the comparison point for your ROI calculation. Include the costs that don't appear on the license invoice, because that is where most of the gap is. No LMS today? Count the spreadsheets, shared drives, manual tracking and staff time you use instead.

Cost Item	Current Annual Cost	Notes
Current LMS licensing	e.g., $90,000	
Support & maintenance	e.g., $10,000	
Internal administration (staff time)	e.g., $40,000	
Workaround tools / parallel systems	e.g., $15,000	
Custom development / integrations	e.g., $12,000	
Manual processes (hours × rate)	e.g., $18,000	
TOTAL CURRENT ANNUAL COST		**$_____**



Section D: Potential Annual Savings

Only count savings you can defend if challenged. An inflated number here is the fastest way to lose credibility with a CFO.

Savings Category	Estimated Annual Savings	Notes
Retired / consolidated systems	e.g., $15,000	
Reduced administration time	e.g., $12,000	
Reduced vendor / support spend	e.g., $8,000	
Eliminated custom development	e.g., $10,000	
Reduced manual workarounds	e.g., $6,000	
TOTAL ESTIMATED ANNUAL SAVINGS		**$_____**

Note on Section D: Your savings are already reflected in the gap between C and B. Do not add them again or you will double-count, and your CFO will find it. Use Section D to show your work on where the difference comes from.

Most organizations find the net annual benefit is larger than their first estimate, once manual process time and workaround tool spending are fully counted.

Section E: ROI Summary

Calculation	Your Number
Total one-time cost (from A)	$_____
New platform ongoing annual cost (from B)	$_____
Current annual cost (from C)	$_____
Estimated annual savings (from D)	$_____
Net annual benefit (C – B)	$_____
Estimated ROI breakeven (A ÷ net annual benefit × 12)	_____ months



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03

Executive Presentation Deck



Use these slide outlines to build your leadership presentation. Each slide includes the key message, supporting points and a suggested speaker note. Keep the deck to 8 slides. Executives don't read past that.

Suggested meeting format: 20 minutes. Slides 1–6 take 12–15 minutes. Slides 7–8 are your close. Leave 5–8 minutes for questions and the decision.

1 Why We Need to Act

KEY MESSAGE: We have a decision deadline, and the clock is already running.

- Our trigger: [contract renewal on [date] / vendor end-of-life on [date] / audit on [date] / consolidation after [event]]
- If we miss it: [auto-renewal for [X] years / no security patches or support / audit findings / two systems running in parallel]
- Enterprise LMS projects take 12 to 18 months
- The decision is not whether to act. It is how fast we can act responsibly

Speaker note: Don't spend more than 2 minutes here. The audience needs to understand there is a real deadline, then move on to why it matters to them specifically.

2 The Runway Is Shorter Than It Looks

KEY MESSAGE: Working backward from our deadline, our decision window is now.

Today	Begin internal audit, secure budget, identify project team
Months 1–6	Requirements, vendor evaluation and selection
Months 6–10	Planning, data prep, configuration
Months 10–14	Migration, testing, go-live
[Decision deadline]	[What happens on this date]

Speaker note: Fill in real dates before the meeting, not month numbers. Count backward from your deadline and show the latest date you could start and still finish safely. That date is the ask.

3 The Cost of Waiting

KEY MESSAGE: Delay is not a neutral choice. It actively increases cost, risk and exposure.

- Our current setup is costing us approximately $[X] per year
- Compliance exposure: [X] years of records in a system that [can't report on them / is being retired / we may lose access to]
- Rushed go-live risk: compressed timelines mean more data errors and less testing
- Renewal lock-in: missing the notice date can commit us to [X] more years at $[X]
- Emergency procurement: buying under deadline pressure removes our negotiating leverage

[Insert your Cost of Doing Nothing worksheet numbers here. See Component 07.]

Speaker note: This is where the Cost of Doing Nothing worksheet pays off. Lead with the annual number from Component 07. "Our current setup is already costing us $X per year" is the sentence that changes the room.

4 Our Current Learning Ecosystem

KEY MESSAGE: Here's what we're working with today, and why the status quo isn't sustainable.

- [Current LMS / current approach]: [X] active users, [X] courses, [X] years of records
- Integrated systems: [HRIS, SSO, content libraries, etc.]
- Key compliance programs: [list regulated training areas]
- Current annual cost, all in: $[X]
- Top pain points: [2–3 specific problems leadership already cares about]

Speaker note: Keep this factual and brief. The goal is context, not a list of grievances. Lead with scale and compliance stakes, not with features you dislike.



5 Options Considered

KEY MESSAGE: We evaluated the alternatives. Here's why we recommend what we recommend.

Option	Pros	Cons
Stay as we are / renew	No disruption short-term	[Deadline consequence]; problems compound; costs keep rising
Move to our current vendor's newer platform	Familiar vendor relationship	Still a full migration; no competitive pressure on price or fit
Build a custom solution	Fully tailored	2–3× the cost; years to build; no vendor support
Move to [Recommended vendor]	[Fit against our requirements]; proven enterprise implementations	Requires investment and project focus

Speaker note: Executives appreciate that you considered alternatives. Be ready for "why not just stay with our current vendor?" Most will ask it. If staying means moving to a different product, it is a full migration either way, so the effort is the same and the platform choice is still open. If staying means renewing as-is, point back to slide 3.

6 Recommended Path

KEY MESSAGE: Here is our specific recommendation and why it's the right call.

- Recommended vendor: [Vendor Name]
- Why: [3 specific reasons tied to your organization's priorities]
- Implementation model: [Describe the phased approach]
- Go-live target: [Date]
- Internal project lead: [Name/Role]
- Executive sponsor needed: [Name/Role]

Speaker note: Be specific. "We recommend [Vendor Name]" is less persuasive than "We recommend [Vendor Name] because they've implemented [X] organizations at our scale, have a dedicated compliance module, and will commit to a [date] go-live."



7 Budget & Timeline

KEY MESSAGE: Here is what this costs, what it saves, and when we need the decision.

Investment	Amount
Total one-time cost	$[X]
Annual ongoing cost, new platform	$[X]
Current annual cost, all in	$[X]
Net annual benefit	$[X]
ROI breakeven	[X] months

Key milestones:

- Decision needed by: [Date]
- Vendor contract signed: [Date]
- Go-live target: [Date]
- Legacy system retired: [Date]

Speaker note: The Budget Worksheet (Component 02) is your backup. Have it ready if anyone asks for more detail. Don't read the numbers. Let the table do the work.



8 Decision Required

KEY MESSAGE: Here is exactly what we need from this room, today.

We are not asking for a blank check. We are asking for approval to move to the next phase.

We need:

- Executive sponsorship from [Name]
- Budget approval: $[X] for [Phase 1 / full project]
- Authorization to finalize vendor contract with [Vendor Name]
- Commitment of [internal resources] to the project team

If approved today, our timeline is:

- Project kickoff: [Date]
- Go-live: [Date]
- Well ahead of our [decision deadline]

If we delay this decision by [30/60/90] days, we lose that same time from the implementation window. The deadline does not move with us.

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04

Implementation Timeline Template



Use this template to answer the question executives and project teams always ask first: "When do we need to start?" The answer is almost always sooner than you think.

Phase Overview

Phase	Typical Duration	Your Target	Key Output
1. Internal Audit & Alignment	1–2 months	_____	Team assembled; environment mapped
2. Define Requirements	1–2 months	_____	Requirements doc; vendor criteria
3. Vendor Evaluation & Selection	2–3 months	_____	Vendor selected; contract signed
4. Planning, Data Prep & Config	3–4 months	_____	Data cleaned; environment configured
5. Migration, Testing & Launch	3–4 months	_____	Go-live; hypercare complete
6. Stabilization & Optimization	2–3 months	_____	Legacy system retired; roadmap set
TOTAL	12–18 months	_____	

Sample 12-Month Project Plan

This is the compressed end of the range. It assumes a clean environment, few integrations and a project team with capacity. Adjust to your own start date and complexity.

Phase / Activity	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
1. Audit & Alignment	■	■										
2. Requirements		■	■									
3. Vendor Selection			■	■	■							
4. Data Prep & Config					■	■	■	■				
5. Migration & Testing								■	■	■	■	■
Go-Live												✓
6. Stabilization											■	■

Working Backward from Your Deadline

The question is not when you want to go live. It is the latest date you can start and still finish safely.

Your deadline is whatever date forces the decision: a contract renewal or notice date, a vendor end-of-life, an audit, or a business go-live.

Time until your deadline	What it means
18+ months	You have room for a full 12–18 month project with buffer. Start now and protect that buffer.
12–18 months	Start now. A 12-month plan fits; a complex environment will be tight.
9–12 months	Compressed. Shorten selection, limit scope at launch, and line up a fallback.
Under 9 months	Negotiate a short extension or bridge term with your current vendor while you run the project.

Your deadline: _____ Latest safe start date (deadline minus 15 months): _____

⚠ These windows assume a smooth project. Complex environments with many integrations, large user populations or significant compliance requirements should plan for 15 to 18 months, which means starting sooner than any row above suggests. Going live on your deadline leaves no room for stabilization. Target a go-live at least 3 to 6 months before it, and treat the deadline as the point of failure, not the goal.

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05

Stakeholder Alignment Worksheet



Most LMS projects stall because of internal politics, not technical problems. This worksheet maps every key player before your first leadership meeting, so you know who to talk to, what they care about, and what it takes to get them on board.

The Stakeholder Map

Fill this in before you schedule anything. If you cannot name the person in the row, that is your first gap to close.

Role	Name	Influence (H/M/L)	Support (H/M/L)	Key Concerns	Actions Needed
Executive Sponsor (CHRO/VP)	[Name]	High	_____	[Key concerns]	[Action needed]
CFO / Budget Approver	[Name]	High	_____	[Key concerns]	[Action needed]
LMS Administrator / Owner	[Name]	Medium	_____	[Key concerns]	[Action needed]
IT Lead	[Name]	High	_____	[Key concerns]	[Action needed]
Compliance Lead	[Name]	High	_____	[Key concerns]	[Action needed]
L&D Manager / Director	[Name]	High	_____	[Key concerns]	[Action needed]
HR Lead	[Name]	Medium	_____	[Key concerns]	[Action needed]
Business Unit Stakeholder 1	[Name]	Medium	_____	[Key concerns]	[Action needed]
Business Unit Stakeholder 2	[Name]	Medium	_____	[Key concerns]	[Action needed]
Procurement / Legal	[Name]	Low	_____	[Key concerns]	[Action needed]

Influence = decision-making power over this project. **Support** = current level of support for the project (High = advocate, Medium = neutral, Low = skeptic).

Influence ratings are a starting point, not a fact. Adjust them for your organization. In some companies Procurement can stop a project cold and IT cannot. If your deadline is a contract renewal, Procurement and Legal own the notice date, so move them up.



What Each Role Actually Cares About

Use this to prepare before each conversation. Leading with the wrong argument wastes the meeting.

Role	What moves them	What loses them
CFO	Payback period, cost of inaction, bounded ask	Feature lists, unquantified benefits
IT Lead	Integration architecture, security review, their resource load	Being told late, or being told at all instead of asked
Compliance Lead	Record retention, audit exposure, regulatory obligation	Framing this as a learning experience project
Executive Sponsor	Business risk, their own exposure if this fails	Surprises in front of peers
L&D / Business Units	Disruption to their programs, timeline for their teams	Losing functionality they depend on

Stakeholder Analysis Notes

Your Champions

Who is already on board and can advocate internally.

Champion	How They Can Help



Your Skeptics

Who is skeptical or neutral. What are their specific concerns and what would move them?

Skeptic	Their Concern	What Would Move Them

Decision-Making Map

Before your executive presentation, answer these questions:

- Who has formal budget approval authority? _____
- Who has informal veto power (even without a title)? _____
- Who needs to be consulted before the meeting (or they'll feel blindsided)? _____
- Who is the most credible internal voice for this project? _____
- Who has blocked similar projects in the past? What was their objection? _____



COMPONENT

06

Executive Talking Points Sheet

This is the most-used page in the toolkit. Print it. Take it to the meeting. These are the questions executives ask about every LMS project and the concise answers they need to hear.

How to use this: Fill in the bracketed fields with your organization's numbers before the meeting. Practice saying each answer out loud. Confident delivery matters as much as the content.

Q: Why can't we just keep what we have?

We can, but it will cost us more than moving. [State your trigger: our contract renews on [date] for another [X] years / our vendor ends support on [date] / we can't produce [records] for our [date] audit.] Today our current setup costs $[X] per year all in, and it still leaves us with [top 1–2 gaps]. Staying is a decision too, and it is the more expensive one. The only question is whether we make this change on our timeline or scramble at the last minute.

Q: Why do we need budget now? Can't this wait?

Enterprise LMS projects take 12 to 18 months end-to-end. If we wait another [6/12] months to fund this, we lose that same time from our implementation window. Teams that wait face rushed go-lives with more data errors, interim fixes that add cost, and less negotiating leverage with vendors. Every month of delay is a month of increased risk.

Q: What happens if we wait?

Three things happen. First, our timeline compresses, so we either rush the project and accept higher risk, or we miss [our deadline] and [consequence: renew for [X] years / run on an unsupported platform / face the audit with gaps]. Second, our cost goes up, because emergency procurement removes leverage and vendors charge more for compressed timelines. Third, our compliance exposure grows. We have [X] years of regulated training records that need to be preserved and accessible, and the longer we wait, the harder and more expensive that becomes.

Q: What is this costing us today?

Right now, our current setup is costing us in ways that don't show up in the license bill. Our LMS team spends approximately [X] hours per week on manual workarounds. We're running [X] parallel systems to fill gaps. Our completion reporting has holes that create audit risk. And our learner experience lags behind what employees expect from modern tools. We've quantified this: the status quo costs us approximately $[X] per year in administrative overhead and risk exposure.

Q: What's the ROI?

The one-time investment is approximately $[X]. On an ongoing basis, the new platform costs $[X] per year less than our current setup once you include workaround tools and manual process costs. That puts us at breakeven in approximately [X] months. The harder-to-quantify benefit is compliance risk reduction: a single audit finding tied to a missing training record can cost far more than the project.



Q: What's the implementation risk?

The biggest risks in LMS projects are undocumented integrations, poor data quality and compressed timelines. We've accounted for all three. We're starting with a full environment audit, cleaning data before migration, and using a phased go-live that lets us catch issues before they affect all [X] employees. [Vendor Name] has completed [X] implementations at enterprise scale, so they know where the hidden complexity is. And we're building a rollback plan before go-live so we have a safety net.

Q: Why this vendor and not our current one?

We gave our current vendor a fair look. [If staying means moving to their newer product: that is a full migration too, with the same data, integrations, testing and timeline. The effort is identical, so the real question is which platform we want for the next decade.] [If staying means renewing as-is: it doesn't fix [top gaps], and it locks us in for [X] years.] We ran a full evaluation against our requirements, and [vendor] came out ahead on [two or three specific criteria]. We should choose deliberately rather than default.

If you're asked something you don't have an answer for: "Good question. I want to give you the right number rather than guess. I'll follow up by [date]." Never guess in a budget meeting.



COMPONENT

07

Cost of Doing Nothing Worksheet

This is the worksheet executives actually care about. It reframes the conversation from "we want a new system" to "here is what inaction is costing us right now." Complete this before any budget conversation.

The most persuasive number in your business case is not what the new LMS costs. It's what your current setup is already costing you every year. Do this worksheet first, then build everything else around the number it produces.

Part 1: Your Current Learning Environment

Answer these first. The numbers feed every calculation below.

Question	Your Answer	Est. Annual Cost
How many administrators actively support your current LMS (or manual tracking) today?	[Your answer]	$_____
How many hours per week does each admin spend on manual processes?	[Your answer]	$_____
How many parallel or workaround systems are you running because of current limitations?	[Your answer]	$_____
How many hours per week are spent maintaining customizations or integrations?	[Your answer]	$_____
How many learners are affected if your current system has an outage or data issue?	[Your answer]	$_____
How many compliance records (certifications, regulated completions) does your current system hold?	[Your answer]	$_____
How many external systems (HRIS, SSO, content libraries) are integrated with it?	[Your answer]	$_____
What is the annual cost of all workaround tools and parallel systems?	[Your answer]	$_____



Part 2: Calculate the Risk

Use your answers above to estimate the cost of each risk category. These are the numbers that belong in your executive presentation.

Operational Risk

Risk Item	What to Calculate	Your Estimate
Admin overhead	Hours/week on manual processes × hourly rate × 52 weeks	$_____
Workaround tools	Annual cost of all parallel systems that exist because of current gaps	$_____
Custom maintenance	Hours/month on integration and customization maintenance × rate × 12	$_____
Lost productivity	Learner time lost to poor UX, slow load times or outages × average hourly rate	$_____
Total Estimated Annual Operational Risk Cost		$_____

Compliance Risk

Risk Item	What to Calculate	Your Estimate
Audit exposure	Cost of a failed audit or inaccessible compliance record × probability	$_____
Regulatory fines	Maximum fine for your regulated training area × probability of finding	$_____
Legal exposure	Potential liability if certification records cannot be produced on demand	$_____
Record remediation	Cost to manually reconstruct records if data is corrupted, lost or can't be exported	$_____
Total Estimated Annual Compliance Risk Cost		$_____



Business Disruption Risk

Risk Item	What to Calculate	Your Estimate
Renewal lock-in	Cost of another full contract term if you miss your notice date	$_____
Rushed go-live	Additional cost of a compressed vendor timeline (vendors charge a premium)	$_____
Emergency procurement	Lost negotiating leverage when buying under deadline pressure	$_____
Learner disruption	Business impact of training gaps or system unavailability at scale	$_____
Total Estimated Business Disruption Risk Cost		$_____

Part 3: The Total Cost of Doing Nothing

Risk Category	Annual Cost Estimate
Operational Risk	$_____
Compliance Risk	$_____
Business Disruption Risk	$_____
TOTAL COST OF DOING NOTHING (per year)	$_____

When this number is larger than the one-time cost of the new LMS, the business case writes itself. In most organizations, it is.



BONUS

B

How to Have the Conversation



The documents are ready. Now you have to actually have the conversations. Most LMS managers have the data and fumble the sequencing. They go to the executive sponsor too early, skip IT until it's too late, or brief everyone at once and lose control of the narrative.

The goal isn't to talk to everyone. It's to talk to the right people in an order where each conversation makes the next one easier. By the time you present, the decision should already be made in the hallway.

The Right Order of Operations

1 Start with your own team

Before any executive conversation, make sure your own house is in order.

- Align on the problem statement: what's broken, what your deadline means, what you recommend
- Identify the two or three pain points leadership will actually care about, not the ones that bother you most
- Name an internal project owner before you ask for money
- Complete Component 07 together. You need that number before anything else happens

2 Talk to IT before anyone else in leadership

IT can either be your fastest ally or your biggest blocker. Get them early.

- Walk them through your integration map and ask them to correct it
- Ask what worries them: security review, architecture, timeline conflicts with their own roadmap
- Get their rough estimate on IT resource requirements before you put a number in front of finance
- Objective: leave with IT as a co-sponsor, not a skeptic

3 Brief the compliance lead

A compliance concern is difficult to argue against. That makes this the highest-leverage conversation in the sequence.

- Show them what records your current system holds, and where it falls short on access, reporting or export
- Ask them to confirm the retention requirements for your industry
- Ask directly whether they will speak to the risk in the executive meeting
- Objective: leave with someone who can validate your risk narrative in a voice that isn't yours



4 Identify your executive sponsor before the formal presentation

Never walk into a budget meeting without knowing who's already on your side.

- Ask for 30 minutes with your most likely sponsor, usually the CHRO or VP of L&D
- Frame it as wanting their input before you formalize anything, not as a pitch
- Share the Component 07 number and the timeline. Ask whether the framing lands
- If they're supportive, ask them to introduce the agenda item in the formal meeting
- Objective: leave with someone who will advocate in rooms you're not in

5 Brief the CFO or budget approver separately

CFOs hate surprises. A budget request they've never heard of before the meeting is a budget request they'll defer.

- Ask for 20 minutes before the formal presentation
- Lead with the annual cost of staying and the payback period, not the project plan
- Be direct: here's the number, here's the payback, here's what waiting adds
- If your deadline is a renewal, confirm the notice date with them. Finance often owns it
- Ask what questions they expect in the wider meeting so you can prepare for them
- Objective: leave with the CFO informed and at minimum neutral

6 Run the formal presentation

By the time you get here, there should be no surprises in the room.

- Use the eight slides from Component 03
- Keep the Budget Worksheet and Component 07 as backup, not as slides
- Close on slide 8 with a specific, bounded ask and a decision date
- If the decision is deferred, ask what information would help them decide. Don't ask when to follow up



7 Follow up in writing within 24 hours

Whatever happens in the meeting, the written follow-up is where commitments get made real.

- Send a summary with the decision made, or the open question and when it will be resolved
- Attach the Executive Brief and Budget Worksheet
- State the next step and the date
- If approved, confirm the sponsor, the budget figure and the kickoff date in writing

If the answer is no or not yet: ask what specifically would need to be true for this to get funded, and get it in writing. A deferred decision with named conditions is a plan. A deferred decision without them is a dead project.

Schedule a 30-day check-in after approval to confirm resources are actually in place. Projects lose sponsorship quietly, not all at once.





expertusone

info@expertusone.com
www.expertusone.com
877-827-8160