

Internal business-case template

Workforce training programme — the paper that gets it approved

How to use this template. It's structured in the order a Finance Director reads: the problem and its cost first, the catalogue never. Fill in every **[bracket]**, delete the *italic guidance*, choose the Section 2 and Section 4 insert for your programme area from the insert library (Part 2), and keep the finished paper under four pages. The numbers come from your own business; where you don't have one yet, a free skills-gap consultation with Learning People produces the capability benchmark this document is built around.

What's inside

Part 1	The master template: executive summary, problem & cost, options, recommended programme, cost & return, risks, the ask
Part 2	Solution insert library: Cyber Security · Compliance · Cloud & Microsoft · IT & Service Management · Project Delivery · Data & AI · Leadership & Business

[Organisation] — Business case: [programme name]

Prepared by: [name, role] For: [approver, role] Date: [date] Decision needed by: [date]

1. Executive summary

One paragraph the approver could repeat to the CFO. Write it last.

[Team/function] has a measured capability gap in [area] that is currently costing us [headline cost: contractor spend / delivery delay / audit exposure] per [period]. We compared closing it by hiring, contracting and upskilling. Recommendation: a certification-backed upskilling programme for [N] people over [period], costing [£X], measured by before-and-after skills benchmarking. Expected return: [the one number that matters].

2. The problem, and what it costs today

Paste the problem statement from your solution insert here, then complete the cost table. You don't need all four rows to be large; you need them to be real and sourced, so the number survives scrutiny.

[Solution insert — problem statement]

Cost of the gap today	Our number	Source
Delivery drag (projects delayed or descope)	[£ / weeks]	[project/PMO record]
Risk & compliance exposure (findings, remediation, supervisory attention)	[£ / finding]	[audit/risk register]
Contractor & recruitment spend on this capability	[£ / period]	[finance]
Attrition risk (leavers citing development; cost to replace)	[£ / leavers]	[HR]
Total annualised cost of doing nothing	[£]	

3. Options considered

Reference points: Pluralsight's Tech Skills Report puts an average external IT hire at \$14,170 against \$5,770 to upskill an existing employee, and 89% of organisations now say hiring costs more than upskilling; Gartner found only 48% of candidates accepted their most recent job offer (4Q25). Replace with your own figures where you have them.

Factor	Hire	Contract	Upskill existing staff
Up-front cost	[agency fee + salary premium]	[day rate × duration]	[programme cost per learner × N]
Time to capability	[months: advertise, interview, notice, ramp]	Weeks, but leaves with the contract	First certifications in weeks to months, alongside the day job
Capability retention	Leaves if the hire resigns	Leaves when the contract ends	Stays and compounds in the team
Side effects	Above-band offer resets pay expectations	Renewal dependency	Development at existing bands; retention effect
Realistic risk	48% offer acceptance; early attrition	Budget exposure at renewal	Learner drop-off (mitigations in Section 6)

Hybrid is often right: hire the scarce lead where no internal foundation exists, and upskill the team around them so the capability spreads beyond one salary.

Do nothing stays available and costs the Section 2 total every year it's chosen.

4. Recommended programme

[Solution insert — pathway table]

Cohort	[N people, roles]
Duration	[months], alongside the day job
Delivery	Managed programme through Learning People: baseline skills benchmark, certification-aligned pathways with hands-on labs, exam booking handled, progress reported per learner on our review cycle
Our commitment	[X hrs/week] protected learning time per learner; managers act on the progress reports

5. Cost and return

Programme cost (total, [period])	[£]
Cost of the gap (Section 2, annualised)	[£]
Cost of the hiring alternative (Section 3)	[£]
Payback logic	[e.g. programme pays back if it removes N contractor days / fills the role internally / passes the audit]

How we'll prove it (capability, never completion)

Skills benchmark before and after, per person, in the competencies the gap analysis flagged
Certifications achieved: [named certifications from the insert]
The business outcome this was built to move: [delivery time / audit findings / contractor spend / tender eligibility]
Retention in the programme cohort vs the wider team (context: 94% of employees say they'd stay longer at a company that invests in their development — LinkedIn Workplace Learning Report)

6. Risks and mitigations

Risk	Mitigation
Learner drop-off when the day job floods	Named gap per learner, milestones with exam dates, protected study time in the diary; per-learner progress reports so managers see stalls early and act
Manager time	Reporting arrives on our review cycle in a pre-read format; the ask of managers is the follow-up conversation, not the tracking
Capability leaves after we've built it	Certification investment is a documented retention lever (Section 5); development at existing bands beats an above-band external offer resetting the team
Programme doesn't fit the real gap	The baseline benchmark comes first; pathways map to measured gaps, not a catalogue

7. The ask

Approval of [£X] for [programme name] starting [date], decision by [date]. First benchmark report lands [date]; phase 2 proceeds only on evidence from phase 1.

Phasing is deliberate: start with the highest-cost gap, prove the uplift, use the evidence for the next phase. A phased ask is easier to approve than an open-ended one.

Template prepared with Learning People · learningpeople.com/business · The baseline benchmark in Sections 2 and 5 comes from a free skills-gap consultation.

Solution insert library

Pick one insert. Paste its problem statement into Section 2 and its pathway and metrics into Sections 4 and 5.

Insert A — Cyber Security & Resilience

Problem statement (Section 2)

Our security capability can't currently be evidenced to the people who ask for it: [client security questionnaires / the FCA resilience review / Cyber Essentials Plus renewal / tender clauses requiring certified staff]. The security team carries [N] open roles, awareness metrics regress between phishing campaigns, and the gap is documented at [reference].

Cost prompts: tender value at risk where certified staff are scored; questionnaire failures; incident and remediation costs; SOC vacancy cover.

Pathways (Section 4): CompTIA Security+ (first security roles) · CySA+ (SOC) · EC-Council CEH / PenTest+ (offensive) · workforce security-awareness programme with baseline and re-test.

Outcome metrics (Section 5): named certified staff for bids and audits; awareness benchmark movement; audit and questionnaire outcomes.

Insert B — Compliance & Audit Readiness

Problem statement (Section 2)

Mandatory training is delivered but can't be evidenced as capability: completion chasing consumes [N days/month], and the obligations list is growing ([UK GDPR / Worker Protection Act / Consumer Duty & SM&CR / AML / safeguarding & DSPT]). Last audit cycle cost [N days] of evidence assembly.

Cost prompts: audit-prep staff days; findings remediation; regulator or client rework; renewal-cycle admin.

Pathways (Section 4): role-based compliance programme (GDPR & data protection, conduct, financial crime, safeguarding as applicable) with tested understanding, automated tracking and exportable evidence.

Outcome metrics (Section 5): audit-prep time; findings; tested understanding vs attendance; completion currency at any audit date.

Insert C — Cloud & Microsoft (incl. AWS)

Problem statement (Section 2)

[Migration/rollout] is funded and scheduled, but delivery currently depends on [contractor day rates / N open cloud roles]. Copilot and AI tooling is reaching users ahead of trained administrators. Day-two operations aren't yet staffed by people certified to run what's being built.

Cost prompts: contractor day rate × remaining months; migration delay cost; recruitment fees plus empty months on cloud roles (routinely a quarter or more).

Pathways (Section 4): Azure Fundamentals → Azure Administrator → Azure Solutions Architect; Microsoft 365 / Copilot administration; AWS track where the estate demands it.

Outcome metrics (Section 5): certified team before cutover; contractor spend reduction; incident volume post-migration.

Insert D — IT & Service Management

Problem statement (Section 2)

Service quality depends on individuals rather than process: SLA performance varies by [shift/engineer], escalations lose information, and [name]'s absence measurably degrades the desk. Clients and framework bodies ask how service quality is assured; the current answer is "experience".

Cost prompts: SLA penalties or credits; escalation rework; onboarding time per new starter without a process baseline.

Pathways (Section 4): ITIL® 5 Foundation across the desk; ITIL® Managing Professional for service leads; Codecademy automation skills for [N] identified staff.

Outcome metrics (Section 5): first-contact resolution; change-related incidents; consistency across shifts; framework and client assurance responses.

Insert E — Project & Programme Delivery

Problem statement (Section 2)

Delivery outcomes vary by project manager, not by project: [N] of the last [M] projects slipped, and post-mortems point at method, not circumstances. Bids are scored on named certified delivery staff we can't currently list. PMO roles have been open [N] months.

Cost prompts: slippage cost per quarter; bid value where delivery credentials are scored; PMO vacancy cover.

Pathways (Section 4): PRINCE2® 7 Foundation and Practitioner as the shared method; PMP® for senior leads; PMI-ACP® where delivery is agile.

Outcome metrics (Section 5): named certified staff for bids; delivery variance; portfolio-level risk reporting quality.

Insert F — Data & AI Readiness

Problem statement (Section 2)

The AI strategy assumes skills we haven't measured: staff are using AI tools ahead of policy training, analysts are at the ceiling of BI tools, and the data engineering vacancy is in month [N]. Governed adoption requires trained people we can evidence.

Cost prompts: data engineer vacancy cover or contractor; analyst rework; governance exposure of ungoverned AI use.

Pathways (Section 4): two tracks: workforce data and responsible-AI literacy; specialist analytics and engineering (Power BI and Fabric, Python and SQL via Codecademy, Azure or AWS data, AI fundamentals prep).

Outcome metrics (Section 5): literacy benchmark movement; specialist certifications; governed-use evidence; vacancy filled internally.

Insert G — Leadership & Business

Problem statement (Section 2)

[N]% of our managers were promoted without management training. Exit interviews cite "my manager" in [N] of [M] cases; engagement scores in [teams] trail the organisation. The current programme is [none / an annual away-day with no measured effect].

Cost prompts: attrition cost in affected teams (recruitment plus ramp); engagement-linked productivity; employment-relations case exposure where conduct is a factor.

Pathways (Section 4): three-track leadership development programme (leading yourself / leading your team / leading the business); first-time manager pathway for new promotions; AI-simulated practice conversations; before-and-after benchmarks.

Outcome metrics (Section 5): retention in trained cohorts vs baseline; engagement movement; time-to-competence for new managers.

Prepared with Learning People · learningpeople.com/business

Sources for reference figures: Pluralsight Tech Skills Report; Gartner (4Q25 candidate research); LinkedIn Workplace Learning Report.