



# L&D Investment Proposal Template

Template

# Introduction

A robust learning and development (L&D) strategy is essential for fostering employee growth and driving overall business success. It enables organizations to effectively adapt to change, attract exceptional talent, and enhance performance and productivity. However, implementing such a strategy can be challenging, encompassing tasks such as identifying relevant skills, tracking key performance indicators (KPIs), demonstrating return on investment (ROI), and ensuring continuous improvement. To lay the foundation for a successful strategy, a comprehensive L&D investment proposal is crucial.

An L&D investment proposal should outline the objectives, expected outcomes, planned steps, ownership, and more, providing the necessary information for informed decision-making regarding investments in employee development. Use this proposal template to create a comprehensive L&D investment proposal and effectively invest in your workforce to optimize the impact of learning and development initiatives.

Chief Human Resources Officers (CHRO), human resources (HR) professionals, L&D managers and department managers.

*\* Remember to tailor the proposal to fit your organization's specific needs and context and ensure that it is well-structured, persuasive, and supported by relevant data and research.*

## Purpose of this template

An L&D investment proposal is to present a well-structured plan for allocating resources towards employee development initiatives. The proposal seeks to secure organizational support and financial commitment by demonstrating the value and benefits of investing in L&D programs.

## Who should use this template

This template can be used by various individuals or groups within an organization who are responsible for advocating and securing support for employee development initiatives. It includes senior leaders, such as



Date:

Title:

Learning and Development Investment Proposal

Owner/ Department:



## Section 1: Executive Summary

You should provide a concise overview of the proposal, highlighting its purpose, anticipated outcomes, and the importance of investing in employee development.

## Section 2: Objectives

You must clearly state the challenges currently faced by the organization and wider industry and the specific objectives the L&D investment aims to achieve.

### **The objectives could be due to:**

- » Business needs
- » Employee needs
- » Competitive advantage
- » Alignment to the wider HR strategy

### **And these objectives should be:**

- » Measurable
- » Aligned with organizational goals
- » Focused on addressing identified skill gaps or performance areas
- » Address future trend
- » Supported by key stakeholders

## Section 3: Initiatives

This section should describe the L&D programs, activities, or interventions that will be implemented to achieve the stated objectives. Provide details about the content, delivery methods (e.g., workshops, e-learning, mentoring), and duration of each initiative. Explain how these initiatives will address the identified skill gaps or enhance the desired competencies.

## Section 4: Benefits and ROI

This section should articulate the anticipated benefits and return on investment resulting from the proposed initiatives. This may include improved employee performance, increased productivity, enhanced job satisfaction, reduced turnover, and a more skilled and adaptable workforce. Provide supporting data or research to substantiate these expected benefits.

It's important to also discuss the potential consequences if the L&D initiatives are not implemented.

## Section 5: Evaluation and Measurement

You should describe how the effectiveness and impact of the L&D initiatives will be assessed. Specify the evaluation methods, such as assessments, surveys, or performance metrics, and how the data will be collected and analyzed.

## Section 6: Implementation Plan

Please outline the steps required to implement the L&D initiatives effectively. Include a timeline, milestones, and responsible parties for each implementation stage. Depending on the different use cases and objectives, this includes stakeholders such as HR Business Partners (HRBPs), managers, employees, the L&D team, technology providers, and content providers.

You should also address any potential challenges or risks and propose mitigation strategies.

## Section 7: Budget

Present a detailed budget that includes estimated costs for program development, training delivery, technology infrastructure, materials, and any necessary external resources or expertise. Justify the budget by explaining the value and impact of the proposed initiatives.

## Section 8: Conclusion

Summarize the proposal's key points, reiterate the value of the L&D investment, and make a compelling case for its approval. Encourage stakeholders to support the proposal and emphasize its positive impact on the organization's growth, talent development, and overall success.



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**To learn more about the different strategies that can optimize your L&D strategy, download our whitepaper 'How to Maximize Your Employee Skills Training Budget and ROI'.**

### **About Pearson Workforce Skills**

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**Contact us to get started.**