Sample Business Case for Training Request

For this example, let's say you want to pursue additional training in Microsoft PowerPoint.

Training Request for: Julie Perrine, CPS/CAP

Title: Executive Assistant
Department: Executive Office

Situational Assessment and Problem Statement

Over the past 12 months, I have been asked to create and edit more and more PowerPoint presentations for the sales and marketing team. I am very excited that I have been asked to do more of this type of project because it's a skill I want to develop further. However, many of these presentations require advanced knowledge of the software which I do not have yet. Additionally, since we've made the transition to Microsoft Office 2007, it's almost like learning a new program. I have been able to search through help menus and struggle through some of the more advanced elements or ask others to assist me with some of my questions, but I know I would be much more proficient and effective in my administrative support role for the executives and teams I support if I could get some more in-depth, formal training in Microsoft PowerPoint 2007.

Request Description

 I would like to request your approval to attend the New Horizon's PowerPoint 2007 – Level 2 training class in September or November.

Here are the details:

Date: Thursday, September 23, 2010 OR Thursday, November 25, 2010

Time: 8:30 AM to 4:00 PM

Location: New Horizons Computer Learning Center in Hiawatha, IA

Registration Fee: \$325

Solution Description

Upon successful completion of this course, I will be able to:

- o customize the PowerPoint environment
- o customize a design template
- add diagrams to your presentation
- o add special effects to a PowerPoint presentation
- use the various options to customize slide shows
- o use PowerPoint to publish slides to a slide library and secure your presentation
- finalize a presentation

This course is designed for students who want to gain the skills necessary to work with design templates, various types of diagrams, special effects, custom slide shows, collaboration functionality, and advanced presentation delivery. This course also assists in the preparation for the Microsoft Office Specialist exam in Microsoft® Office PowerPoint® 2007. It is for students who already have knowledge of the basics of Microsoft® PowerPoint® 2007, including slide formatting and working with tables, charts, images, objects, and presentation preparation.

Course Outline:

Lesson 1: Customizing the PowerPoint Environment

- Customize the Quick Access Toolbar
- Personalize the PowerPoint Interface
- Customize Save Options
- Apply Advanced Customization Options

Lesson 2: Customizing a Design Template

- Set Up a Slide Master
- Customize Slide Layouts
- Create Custom Themes
- Add Headers and Footers
- Modify the Notes Master
- Modify the Handout Master

Lesson 3: Adding Diagrams to a Presentation

- Create a Diagram
- Modify Diagrams

Lesson 4: Adding Special Effects to Presentations

- Add Multimedia Elements
- Customize Slide Component Animation

Lesson 5: Customizing a Slide Show Presentation

- Set Up a Custom Show
- Annotate a Presentation
- Creating a Presenter-Independent Slide Show
- Set Up a Slide Show to Repeat Automatically

Lesson 6: Collaborating on a Presentation

- Review a Presentation
- Publish Slides to a Slide Library
- Share a Presentation

Lesson 7: Securing and Distributing a Presentation

- Secure Presentations
- Package a Presentation
- Publish a Presentation as a Web Page

Cost and Benefit Analysis

- If the average PowerPoint presentation I work on takes me 2 hours, and I work on 3 presentations each week. That's 6 hours of my time.
- I make \$20 per hour, so that's equal to \$120 per week.
- Over the course of an entire year (50 weeks), that's \$6,000.
- If this training gives me the training I need to be able to accomplish my edits in 90 minutes instead, that's a 30 minute savings (25% increase in productivity).
 - o 30 minutes of savings X 3 presentations per week = 1.5 hours of my time
 - 1.5 hours of my time X \$20 per hour = \$30
 - \$30 X 50 weeks = \$1500
- Over the course of a year, that's a savings to the company of \$1500
- The training cost is \$325.

As you can see, the cost of the training is only 21.6% of the total savings that the company will realize by sending me for this training class.

Implementation Timeline

- Attend the class on September 23
- Begin using my skills on September 24
- Gather the other admins in our division and share what I learned with them also at our October quarterly meeting.

Critical Assumptions and Risk Assessment

• This proposal assumes that I'll increase my PowerPoint efficiency by 25%.

Conclusions and Recommendations

- Based on feedback from other colleagues I have talked to who have attended various training sessions at a
 variety of facilities in our area, New Horizons Computer Learning Center comes the most highly
 recommended for the value of the class content, the class user guides which they provide, and the overall
 cost of the class.
- Another wonderful benefit is I can re-take the training class within 6 months at no additional charge at New Horizons.
- New Horizons also gives access to the equivalent of the web based course on their website for additional refreshers and online training for six months following the in class training.
- This training investment will:
 - Improve my performance
 - Save money and labor on presentation development
 - Increase my on the job productivity
 - Improve the customer satisfaction of my executive and team with my final work product
 - Make me an even better administrative professional
- I would like to respectfully recommend that this training be approved for me and the class registration be reimbursed by the company.

| Thank you for your consideration of this request |
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| Respectfully submitted, |
| [Your Signature] |

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"What's worse than training your workers and losing them? Not training them and keeping them."

-- Zig Ziglar

"An investment in education always pays the highest returns."

-- Ben Franklin