

# ***Making A Business Case***

## ***Question:***

**Now That I've Decided To Take  
Dale Carnegie, How Do I Get  
My Company To Pay For It?**

## ***Answer:***

**Simple. Build A Concise, Straightforward  
Business Case On How You Will Have  
A Positive Effect On Their Bottom Line.  
(Here's How)**



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***“A lot of training companies say what they do, but don’t do what they say,” says Dave Milliner, Service Manager for Lanier Canada. “Dale Carnegie® delivers.”***

*In addition to not living up to their promises, feedback indicates that some training organizations just put bodies in a class and do not ask for training objectives. Others convince people they can substantially enhance skills in one or two day seminars. The lack of follow-up (during and after the process) was also found to be a big miss.*

***“I like the idea of learning a little bit at a time, then having to go out and put it into practice”, says Jim Irwin, National Sales Manager for ITW Construction Products in Scarborough. “If people are committed, then this is money well spent.”***

*Executives tell us that a consistent, structured process with a good reputation, also allows bosses to weed out “flavour of the month” training.*

***“Since being promoted, I realize that I was using old habits from my previous positions. Coaching from Dale Carnegie helped me develop skills that are more relevant to my new position. I used to go to a meeting already stressed out and the person I was meeting with was also stressed. Sometimes it would end in confrontation. Now, I have a different approach. I go into the meeting understanding where the other person is coming from, I listen better and they listen to me. The results are amazing! Projects are going smoother and information flows freely between departments.”***

*Gavin Durkin  
Electrical/Fire Safety Coordinator  
Rimply Manufacturing  
Decoma Division, Magna*

# **Why should they invest in you? What will the *return on investment* be to the organization if you take Dale Carnegie®?**

## **How to present a business case to your organization**

In today's competitive business market, organizations are constantly looking for ways to improve their business results without increasing their costs. The biggest expense for most companies is their people. Organizations are constantly bombarded with brochures, emails and flyers from training providers asking them to spend money. Your company is faced with a dilemma – where should they allocate their limited resources and who are the candidates (you) that will provide them with the highest return on their investment? It's a risky, time consuming, and somewhat daunting task.

Some large organizations make resources directly available to employees to improve performance. In essence, they are leaving it up to individuals to choose performance improvement resources that best suit their needs. Increasingly, even these organizations ask people to submit a business case to justify the company's investment. Sometimes a manager or supervisor approves this plan, and they too, are bombarded with requests for funds both internally and externally by suppliers.

Whatever your company's policy, it's still important to present a business case. Even if you have the final say, management will appreciate your initiative and respect for their limited resources. If you have ambitions to move into a more responsible role, your business thinking and initiative are characteristics executives look for when selecting candidates for advancement. Surprisingly, many employees simply apply for, and take training without either first presenting a business case or giving their organization feedback on the tangible outcomes produced. Put yourself in the shoes of senior managers who allocate resources to help employees develop the skills they need and not hearing back how their investment is working. Imagine your broker taking your money to buy mutual funds and not telling you how your investment is doing. Even if it's not doing well, you'd expect to hear from him or her, and receive suggestions on how to maximize your return.

Creating and presenting your business case is an opportunity to stand out from the crowd as an individual serious about developing competencies critical in producing tangible outcomes for the organization. These are your skills to keep, but the organization needs to see a direct return on their investment.

In some organizations, less than 15% of employees access funding that is already allocated. A cynic could make a case that these companies like this since it “saves” them money. Our experience with some of the best run companies in Canada tells a different story. Here’s what we hear from owners and executives:

*“We do not want to invest money in training that does not work. We are not interested in investing in employees who will not put in the required effort. While we do not want to “force” people to take courses, we need people to advance their skills. Staying the same undermines our competitive position in today’s high-performance, global marketplace.*

*We are willing to invest in people, and, as a matter of fact, we insist that our people constantly upgrade both their technical and non-technical skills. The differentiator in our business is the non-technical capabilities. Our competitors can hire technically competent people too. Communication and relationships are critical to our future. We need people who can work well with others, listen, connect and move people to action. It’s harder to find people with technical capabilities **and** the required non-technical skills. Competitors actively seek to sell our customers on switching, and we need people to create relationships that inoculate our valuable customers from these attacks. We cannot give our competitors opportunities to attract our customers away. That takes more than just technical skills or knowledge. We cannot build this business ourselves; it takes a coordinated and seamless team effort to serve our customers in ways that they demand to be served.”*

[If you’d like an expanded version of this information, request our booklet on **Business Execution**. It is written for managers and executives based on our interviews with some of Canada’s most successful businesses. In it, you get access to the *five biggest issues* facing today’s Canadian companies.]

## Build a Case for You

With this background, it is important that you create a *specific business case* on how your organization will benefit from investing in you. It is important that your case stands out from other requests. It should include more than just a course outline and fees. What works best is a brief but specific case detailing the skills you propose to enhance or develop and your estimation of what those skills will produce. If you really want to delight management, attach clear, tangible and specific promised outcomes in dollars and cents. [We can help you with this.] That's something they do not see every day. When you meet and exceed these specific targets, we promise they will sit up and take notice of you!

The good news is that, with Dale Carnegie, you'll gain many benefits beyond the scope of your work. It will enhance your home life, social, and other outside work activities that are important to you. While most good organizations are okay with this and like this benefit, they still need to justify their investment in you in business outcomes, in business terms.

## Template For Success

On the next few pages is a step by step process, and a sample letter or email that others have used to communicate to their organizations their commitment. The goal is to present a clear, legitimate and compelling reason why your organization should invest in you using Dale Carnegie's proven processes.

***“When I think of the Dale Carnegie organization, I think of them as a sustaining resource for Labour Ready. The results have been unbelievable!”***

- \* Doubled business in one year from \$20m to \$40m***
- \* Achieved Real Sales Growth of 45%***
- \* Reduced turnover from 200% down to 41%***
- \* Received a 1.49 NEER rating from Workers Compensation***

***-Steve Cardy  
Labour Ready Canada***

## Presenting Your Case

Hello [Name of the person from whom I'm requesting support]

As I understand the goals of our organization, we are focused on [specific objectives or issues]. My commitment to the organization is [job responsibility] and I am accountable for [specific results] to impact our bottom line.

To have a greater impact for the organization, I feel I could be even more effective at: [specific skills]. I have done some research and found a well-established organization that specializes in coaching people to enhance these skills. Specifically, I feel this will help me [name specific outcomes. Attach your outcomes to specific goals and current mandates]. The organization I have selected provides specific outcome guarantees and works with both me and the organization on behalf of these firm promises.

For this, and other reasons, I'm requesting support for a Dale Carnegie Program beginning in the next few weeks. I've committed the time required (one evening a week for nine weeks) and have set some specific targets for both myself and to the organization. The investment is \$1,995.00 which includes books, supplies, and over 30 hours of specific coaching and training. I will also have access to individual feedback and coaching as well as connecting my Dale Carnegie business coach to you on behalf of producing measurable business results. That means you have input into my results as well.

I realize this is a serious investment and I would appreciate an opportunity to discuss this in person. [Option: I know there are funds allocated for such a process and request support for this process]

I'm very excited about expanding my capabilities and request a response as quickly as possible. I'd like to begin this process [targeted date]. Will this work?

[Your Name]

***We've attached a sample of a specific letter to guide you. Feel free to call us at: 905-826-7300 or 1-800- 361-2032 for any assistance you require or to simply practice on us - we can coach you right on the phone to help you create a successful presentation.***

**Sample Letter:**  
(With details added)

Hello Mr/Ms Burns,

As I understand the goals of our organization, we are focused on increasing our market share with accounting and legal firms. My commitment to the organization is designing and presenting specific solutions for these target markets and I am accountable for personalizing our offering and working with our sales and marketing people to secure new business opportunities that will add to our bottom line.

To have a greater impact for the organization, I feel I could be even more effective at working with both clients and fellow team members. I have done some research and found a well-established organization that specializes in coaching people to enhance these communication and relationship skills. Specifically, I feel this will help me manage an increasing work load, hit aggressive deadlines with high quality, coordinated work. I anticipate this will reduce lag time and save money invested in extra re-work as well as produce 20-30% output increases in the same amount of time. The organization I have selected to provide me with coaching gives *specific outcome guarantees* and works with both me and the organization on behalf of these specific promises.

For this, and other reasons, I'm requesting support for a Dale Carnegie Program beginning in the next few weeks. I've committed the time required (one evening a week for nine weeks) and have set some specific targets for both myself and the projected return to the organization. The investment is \$1,995.00 which includes books, supplies, and over 30 hours of direct involvement, coaching and training. I will also have access to individual feedback and coaching as well as connecting my Dale Carnegie business coach to you on behalf of producing measurable business results. That means you have input into my results as well.

I realize this is a serious investment and I would appreciate an opportunity to discuss this in person. I know there are funds allocated for such a process and request support for this specific coaching and training process.

I'm very excited about expanding my capabilities and request a response as quickly as possible. I'd like to begin this process in mid January. Will this work?

Sincerely,  
[Your Name]

## Your Business Case – In Person

[We are a bit sensitive at the self-promotion here, but if we don't tell you these facts, no one else will.]

**Your case needs to answer for your organization these critical questions:**

- Why should we invest in you taking this training?*
- Is the provider a reputable and recognized organization?*
- What, specifically is this process designed to produce?*
- Will it produce the results we need? How will we know?*
- Is it specific to our business application?*
- What promises are they making?*
- Is it worth the investment of time, effort and money?*
- Are you willing to put in the required time and effort to produce results?*

### Why should we invest in you taking this training?

In presenting this case, be specific rather than vague. Instead of just saying something like, “I want to communicate better,” say something like: “I believe a higher level of communication is required when I speak with suppliers. I need their willing cooperation and while I have to a certain extent, I want to develop higher level listening and relationship skills to create an even stronger relationship. This, I believe will save time and gain the kind of fast response time we're going to need from them to serve our customers.”

This is a good reason to talk with your Dale Carnegie representative first so you can establish these kinds of specific goals together. They are trained to assist you in designing specific action plans tailored for you and your organization. There is no additional charge for this, it's a part of our commitment to achieving specific results.

### Is the provider a reputable and recognized organization?

The Dale Carnegie Business Group offers in Canada, the Dale Carnegie Process<sup>®</sup>. This is the world's most recognized name in skills development. Beginning in 1912 as a business public speaking course, and, in 1936, the best selling book, “How To Win Friends and Influence People” (over 30 million copies sold), the organization now coaches and trains over a million people each year. The focus is on developing non-technical skills to produce specific business outcomes. While these skills are portable and apply outside the workplace, Dale Carnegie is mostly funded by organizations and is unique in its performance result guarantee. Most training providers will not hold themselves accountable that their services will actually make a positive, monetary impact on the business. Dale Carnegie, with Jack Phillips, a measurement expert, has developed a formula that measures specific return on investment numbers. All materials are ISO 9001 certified.



## The Dale Carnegie Process

Set **Specific Performance Improvement Goals** together.

Incorporate **Strong Tested Principles** and **Time Spaced Learning**, which is “Practice Through Application”, the most effective way for anyone to retain what they’ve learned.

**Strong Coaching, Accountability** and **Follow-up** methods to ensure that agreed upon goals and objectives are reached. **Guaranteed!**

### Summary

While this is probably more information than you’ll ever need, please use what you see fit. Dale Carnegie said: *“In a business presentation, know forty times more than you’ll ever need to give. This is your source of confidence. Earn the right and present your case with energy and commitment.”*

Again, please contact us for support, and arrange to further our mutual commitment.

**905-826-7300 or 1-800- 361-2032**

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