



ROI

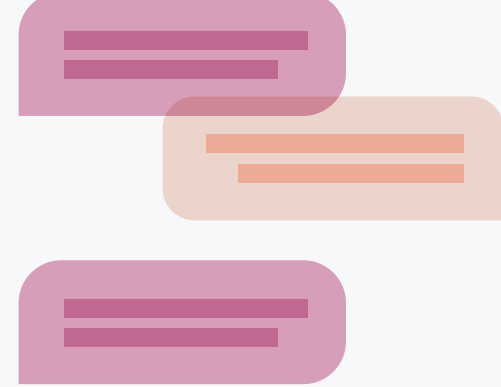


eBook

# Mission: ROI

**How to Speak Your CFO's  
Language with Measurable  
Business Impact**

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## Introduction

As a learning leader, you're responsible for driving impactful learning programs that align with broader business goals. But when it comes to securing and expanding budgets for learning and talent development, it's crucial to speak the Chief Financial Officer's (CFO) language.

To the CFO, the value of learning investments isn't just about content or engagement metrics; it's about ensuring that learning initiatives directly contribute to the organization's financial performance and long-term growth.

Learning operations maturity, underpinned by the LearnOps framework, can help you bridge the gap between L&D and finance. By understanding the metrics that help you build a story the CFO cares about, you can make a compelling case for the ROI of your learning programs.





# The Challenge of Making Learning ROI the **Superpower** CFOs Can't Ignore

CFOs focus on ensuring that every investment contributes to the business's overall financial health and strategic objectives. For them, learning initiatives should be evaluated based on how they drive measurable, long-term value—whether that's through increased productivity, efficiency, or profitability.

However, the challenge for learning leaders is that learning and training programs are often viewed through a different lens. To be seen as a strategic driver, L&D must move beyond traditional training metrics like course completion rates and satisfaction surveys.

Of course, talent and learning development leaders already know this and some are part of the way there. In the [2024 LearnOps Trends & Insights Report](#), only 25% of respondents said they reported on ROI to stakeholders, but 60% said they do report on some form of “training effectiveness.”

The data also presents an opportunity to form a hypothesis about where the gap really lies. Learning and talent development are certainly pushing for closer ties between training and business results, but finding it challenging. When it comes to “training effectiveness,” 45% are still relying on learner feedback for measurement.

The true gap lies in business alignment, and it starts much further back than the reporting and measurement stage. True ROI measurement requires close collaboration with the rest of the business, not just in setting learning program objectives that align with business and performance goals, but in collecting and leveraging the data required to prove ROI. However, when asked about the tools and systems used for measurement, LMS Analytics, survey tools and spreadsheets dominated the responses.

So how does this stack up for the CFO? When assessing a talent development budget, they're presented with plenty of facts and figures about employee engagement, certification rates and skill competency levels, sometimes augmented with business performance improvements when the learning leader has the data to draw a connection.

But when budgets are under scrutiny, it's numbers and calculations that CFOs want to see to have confidence in L&D's impact on long-term value.



**In the 2024 LearnOps Trends & Insights Report, only 25% of respondents said they reported on ROI to stakeholders, but 60% said they do report on some form of “training effectiveness.”**



While L&D has made strides in measuring effectiveness, **the real challenge is aligning those metrics with the business outcomes that matter most to the CFO.** They're looking for clear, measurable connections between learning initiatives and tangible business results—things like increased productivity, profitability, or cost efficiency.

To bridge this gap, **the key is having learning operations that are well-organized, aligned with business goals, and capable of providing actionable data.** By using a structured approach, L&D teams can move from simply measuring outputs to building the concept of impact and measurement into the entire learning lifecycle, streamlining the ability to demonstrate how their programs directly contribute to the company's overall performance. This not only helps prove the value of learning investments but also builds stronger collaboration with the CFO, showing how learning drives the business forward.

## LearnOps + L&D: The Dynamic Duo Turning CFO Skeptics into Fans

The LearnOps framework is your sidekick on the journey to building a more mature L&D function. It enables learning and talent leaders to create programs that are not only aligned with business goals but also measurable in terms of ROI.

From department structure and governance to strategy execution and measurement, the LearnOps framework ensures your learning organization performs optimally and provides the data and insights you need. It guides:

- How you plan alongside the business according to strategic objectives
- The management of your programs, plans and budget
- The execution of projects and optimization of team workflows

### *What is LearnOps?*

*LearnOps, short for Learning Operations, is a framework that brings structure, strategy, and efficiency to the management of learning and development (L&D) programs. It's about creating streamlined processes that connect every part of L&D—from strategy and planning to delivery, tracking, and reporting—into a unified system. The goal of LearnOps is to align learning initiatives with broader business objectives, ensuring that training programs are not only effective but also deliver measurable value to the organization. With LearnOps, L&D teams can make data-driven decisions, optimize resources, and continuously improve learning outcomes, ultimately demonstrating their contribution to the company's overall success. It's about transforming learning from a tactical function to a strategic driver, making it easier for organizations to scale, adapt, and achieve long-term goals.*



Here's how LearnOps supports your efforts to speak to what is important to CFO's:

- **Alignment with Business Goals:** LearnOps ensures that learning objectives are directly tied to the company's strategic objectives, making it easier to demonstrate the financial value of L&D initiatives.
- **Data-Driven Decision Making:** LearnOps emphasizes the importance of data collection, analysis, and reporting to evaluate the impact of learning programs on business performance. This helps you build a stronger case for continued L&D investment.
- **Scalable and Predictive Learning:** As your LearnOps maturity grows, you gain the ability to forecast the outcomes of your learning programs, demonstrating how future learning investments will drive measurable business results.

## Unlock Your LearnOps Potential: Join Our Free Workshops

Gain hands-on experience and practical insights into reinventing your learning operations, aligning L&D with business goals, and driving measurable impact.

[Save Your Spot](#)



# The LearnOps Journey: From Hidden Power to Strategic Hero

Like any business function, L&D operations must evolve to meet changing organizational needs. While the LearnOps framework provides a solid foundation, the LearnOps Maturity Model is the roadmap that helps L&D teams assess their progress and align their initiatives more closely with the organization's strategic and financial objectives. It's the key to understanding where you are on your LearnOps journey and identifying the steps to grow, improve, and drive measurable impact.

The more mature your learning operations, the more efficiently you can plan, manage and measure the impact of your programs.

## Level 1: Reactive (Ad-hoc L&D Programs)

At this stage, learning is often uncoordinated, with limited ability to track or measure its impact on business outcomes. While valuable in some contexts, a reactive approach makes it difficult to provide the CFO with the financial evidence needed to justify L&D investments.

**CFO's Concern:** The CFO is likely to question the ROI of L&D programs if they cannot clearly see how training contributes to the organization's broader goals. At this stage, L&D needs to improve its alignment with financial outcomes.

## Level 2: Managed (Standardized Processes and Initial Metrics)

At this stage, learning is often uncoordinated, with limited ability to track or At this level, L&D begins to develop more standardized processes and collect initial performance data. While programs are more consistent, the data collected often focuses on outputs (e.g., course completion rates) rather than outcomes (e.g., improved productivity or reduced costs).

**CFO's Concern:** The CFO may still struggle to see how training is directly impacting the organization's financial goals. While data collection improves and you may be able to show how well your team executes their work, it's not yet sufficient to demonstrate clear ROI.



## Reactive

### Level 1

- Order taker mentality
- Ad hoc intake/processes
- Spreadsheet overload
- Lack of resources
- Reduced visibility
- Slow time to market
- Siloed operations
- No ROI/measurement



## Managed

### Level 2

- Vision and accountability
- Defined processes
- Disparate IT tools
- Partial alignment to strategy
- Business partners identified
- Limited stakeholder visibility
- Resources adequate
- Unpredictable time to market
- Siloed operations
- Suboptimal ROI/measurement



### Level 3: Strategic (Aligned with Business Goals)

At this stage, L&D has become a more strategic partner to the business. Learning programs are aligned with broader business objectives, and the data gathered is used to demonstrate measurable outcomes—such as improved employee performance, increased sales, or cost savings.

**CFO's Concern:** The CFO wants to see data that directly correlates with business outcomes. Here, learning maturity allows learning leaders to provide concrete evidence of the impact of training programs on the company's financial performance.

### Level 4: Predictive (Integrated and Scalable)

At this level, L&D operates as a fully integrated part of the business, with systems that track learning outcomes and link them directly to business performance. Predictive metrics, such as forecasting the impact of learning on future business outcomes, allow organizations to continuously optimize learning investments.

**CFO's Concern:** At this level, the CFO can see the strategic alignment between L&D programs and business results. With the ability to predict future performance and justify investments, L&D is positioned as a key driver of business growth.



## Strategic

### Level 3

- Seen as trusted advisor
- Standardized processes
- Single source of truth system
- Aligned to strategy, skill gaps and business performance
- Business partner advisor board
- L&D plans, tracks, and forecasts resources accurately
- Stakeholder visibility / trust built
- Efficient speed to market
- Streamlined operations
- ROI / measurement / impact best practices implemented



## Predictive

### Level 4

- Seat at table earned
- Automated processes
- Integrated system for operations
- Benchmarks and insights
- Agile resources and staffing
- Link investments to programs, projects, and corp. objectives
- Finance and procurement is an advocate of L&D
- Full stack visibility
- Predictable speed to market
- AI intelligence / reporting to inform quality decision making
- Scalable operations
- Integrated ROI / measurement/impact analysis

## The State of Online Learning in 2024: Key Insights from 360Learning

As L&D teams mature in their operations and strive to demonstrate ROI, [360Learning's 2024 State of Online Learning Report](#) provides key insights into how online learning is evolving to meet business demands and close skills gaps.



# Writing the First Chapters of Your Learning ROI Origin Story

As L&D leaders, your journey to demonstrating ROI and aligning with the CFO's business goals begins with taking concrete action. The path to success isn't just about tracking short-term results—it's about building a strategic, data-driven narrative that shows the long-term value of learning initiatives. By using financial metrics to bridge the gap between learning outcomes and business performance, you can transform your L&D efforts from tactical to truly strategic, earning the CFO's trust and proving your function's value.

## 1. Rethink Cost-Benefit Analysis Through a Long-Term Lens

CFOs are accustomed to seeing the immediate ROI—short-term benefits like increased productivity or reduced costs. But L&D professionals must elevate their strategy by presenting a longer-term cost-benefit analysis that positions training as a strategic enabler of long-term organizational growth. Instead of focusing on immediate financial gains, start tracking how learning initiatives influence future business outcomes. For example:

- **Predictive Gains:** Use predictive analytics to estimate how ongoing upskilling can contribute to future growth. For instance, if your leadership development programs have historically resulted in a 5% year-over-year increase in sales productivity, forecast how this will continue to scale.
- **Strategic Alignment Forecasting:** Present scenarios that demonstrate how learning investments will continue to align with evolving business priorities. This long-term view speaks to the CFO's desire for sustainable impact rather than just short-term wins.

## 2. Dive Deeper into Efficiency Beyond Time and Cost Savings

Efficiency isn't just about reducing time to proficiency or cutting costs. Senior L&D professionals should move the conversation to operational efficiency, demonstrating how learning initiatives improve organizational agility and resource optimization over time. For example:

- **Process Optimization via Learning:** Evaluate how training impacts not just individual performance but organizational workflows. If a program designed to improve cross-functional collaboration results in more streamlined communication and fewer bottlenecks, quantify this improvement in terms of increased project completion rates and reduced cycle times. This approach helps the CFO see the operational efficiency gains that result from learning—something beyond traditional cost savings.
- **Agility Metrics:** Introduce agility KPIs—how quickly employees can adapt to new market conditions after training. Presenting these metrics speaks to the CFO's concern about future-proofing the workforce.

## 3. Shift from Output Metrics to True Business Impact

We know that CFOs are skeptical of traditional L&D metrics such as completion rates or learner satisfaction scores. To truly speak the CFO's language, L&D needs to shift the focus from outputs to outcomes, specifically those linked to bottom-line performance. The trick is moving beyond the usual financial performance indicators and linking them to behavioral and process changes. For example:





- **Behavioral Impact:** If your leadership program drives managers to spend more time coaching and developing teams, quantify the cascading impact on employee performance and morale. Use employee retention rates as a proxy for the long-term value that leadership training brings to reducing turnover and recruitment costs.
- **Process Metrics with Financial Returns:** For instance, in a compliance program, rather than just tracking completion rates, look at how well-trained employees reduce legal incidents or compliance-related fines, which translate directly into cost avoidance.

#### 4. Build Predictive Learning Models Linked to Business Metrics

Here's where advanced predictive analytics comes in—beyond traditional reporting. You can start forecasting the impact of your learning initiatives in a way that directly correlates to future business results. For example:

- **Predictive Learning ROI:** Use data to forecast the financial impact of future learning investments. This involves tracking the longitudinal impact of training over multiple years, such as how leadership programs correlate with long-term revenue growth and sales performance. In short, develop a predictive model where learning ROI is projected over time, considering how training programs continue to affect business outcomes in a more compound way.
- **Scenario Planning for the CFO:** Create different learning investment scenarios and show the CFO how different levels of investment in training will lead to specific business outcomes, like productivity gains or cost reductions. This helps the CFO see a range of options and choose the most viable financial strategy for investment.

#### 5. Establish a Continuous Learning ROI Framework

Instead of seeing learning ROI as a one-time measurement, senior L&D professionals should position it as a continuous cycle of improvement and measurement. By doing this, you are making it clear to the CFO that L&D is a long-term business strategy, not a series of isolated programs. Here's how to implement this:

- **Link Continuous Learning to Business KPIs:** Demonstrate how each stage of learning—whether it's onboarding, compliance training, or leadership development—feeds into broader organizational KPIs. Create an ongoing reporting framework that captures learning impact over time, aligned with key business outcomes like employee performance, revenue growth, and cost efficiency
- **Show Incremental Business Impact:** Regularly provide the CFO with reports that demonstrate the ongoing contributions of learning to business success. This approach helps position learning as an integral part of the company's long-term performance, not just as a budgetary item.



# Level Up Your L&D: Unlocking the CFO's Trust and Powering **Business Impact**

As a learning leader, embracing the LearnOps framework and advancing your learning operations maturity equips you with the tools to show how L&D directly impacts your company's success. With the right processes in place, you can demonstrate the measurable value of learning initiatives, transforming your department from a tactical function into a strategic business driver. This journey helps you speak the CFO's language, positioning L&D as a growth partner rather than a cost center.

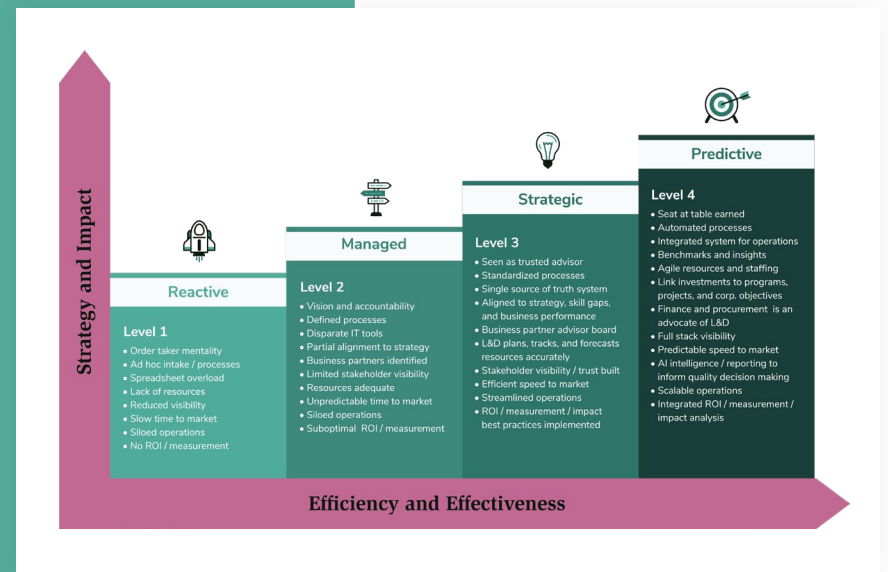
The roadmap to ROI and strategic alignment is clear. By embracing LearnOps and maturing your L&D function, you'll not only optimize learning outcomes but ensure that the CFO sees L&D as an essential part of the organization's long-term success.

Are you ready to take the next step? [Start assessing your LearnOps maturity](#) today and unlock the full potential of your learning programs.

## Assess Your **LearnOps Maturity** and Get a Clear Roadmap for Demonstrating ROI

Discover where your learning and talent development function stands and identify your next steps to transform into a strategic powerhouse. Start your journey toward measurable ROI and business impact today with this free, easy-to-use assessment.

[Start Here](#)





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