

**Learning Uncut Emergent Series**  
**Lori Niles-Hoffman & Dave Buglass**  
**How to Make The Business Case for Change**  
**Conversation with Laura Overton published on 23 July 2020**



**About the Emergent Series**

*This episode is part of the Learning Uncut Emergent series where we talk about rapidly changing business models, and how Learning and Development can support organisations to adapt. Exploring how learning professionals can emerge from disruption as relevant and effective. The series is co-hosted by Michelle Ockers, Laura Overton and Shannon Tipton.*

**Laura Overton:**

So welcome everyone to the next in the series of Emergent, which is a Learning Uncut podcast looking at how learning and development can emerge from this crazy pandemic that we're finding ourselves in the midst of right now. It's giving us opportunities and it's giving us great challenges, but it's also a very stressful time. My name is Laura Overton and I am co-hosting the podcast with my colleagues, Shannon Tipton and Michelle Ockers. Today I'm very excited to welcome two amazing guests who I have had the privilege to work with over the years. First of all, Lori Niles-Hoffman. Welcome to you. You are a partner and co-founder of NilesNolen, and thank you for joining us today.

**Lori Niles-Hoffman:**

Thank you. It is an absolute pleasure to be here.

**Laura Overton:**

That's great. I know you've got lots of experience from all of your different backgrounds, at KPMG, Royal Bank of Canada. So I'm looking forward to exploring that and Dave Buglass again, I've known you for so long Dave when you were at the Royal Bank of Scotland and then at Tesco and Tesco Bank. And now you are the director of learning services at PWC. So welcome Dave, thank you so much for joining us.

**Dave Buglass:**

You're welcome. It's an absolute pleasure

**Laura Overton:**

Well, we'd like to find out first of all, a little bit of perspective for you, what life's been like for you personally. What this change and disruption meant for you, for your clients in the last few months? Lori, tell us a little bit more.

**Lori Niles-Hoffman:**

I think it's been really interesting. For me, personally, I'm located in Toronto, Canada, but I'm usually 50% of my time in Europe and the UK. And so that idea of switching off the relationships to digital especially on a global perspective has been probably the challenge, not just for me, but for everyone. And what I'm seeing with my clients is we're coming to a point where at first everything was very knee jerk reaction and everybody's trying desperately to make things the same as they were just in digital. They were just trying to replicate it and make it status quo, because that was what everyone was comfortable with.

**Lori Niles-Hoffman:**

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Now we're starting to see that there are ones, some of our clients who are now starting to think more strategically. Starting to say, "Okay, the old way is not replicable. So what are we going to do? And how do we forge new paths?" I am also seeing just to face it. There are some companies where we're seeing that L&D is now considered a luxury and they're prepared to cut, which I obviously think is short-sighted, but we are seeing that happen. And so the ones that are remaining in L&D are struggling to make themselves relevant and are fighting for their jobs. So that's the landscape that we're personally seeing at NilesNolen.

#### **Laura Overton:**

And Dave, I know that you've changed your role in the middle of all of this, but what have been your general observations as well in terms of the disruption for yourself and for what you're seeing in the industry right now?

#### **Dave Buglass:**

Yeah. I started lockdown literally week one, accepted a new position at PWC. So I've been here 12 weeks now. Loved every minute of it so far. I had my laptop delivered to the house. I did my checks on screen on my first day. And all my network so far has been through development of virtual discussions using Hangouts. So it's been really quite interesting. I think even so into soon an organization like PWC, I've seen a real, saw a buzz and interest for the firm's internal learning platform. I've worked outside for a long, long time and to come to PWC and see the money and the investment that they've placed on learning management systems and analytics and really top-class quality content has been really quite refreshing to see and I think that's probably helped us and steer us in really good stead for this phase at the moment. I'm sure we're probably far more fortunate than most organizations. We haven't seen budget's been cut with regards to learning and et cetera, et cetera. In fact, we've seen probably an increase in demand and an increase in content consumption. So far so good. I'm loving it. Everybody's been really, really helpful so far. And now we just need to see where it goes, I guess. But yeah, so far so good.

#### **Laura Overton:**

That's really great to hear that. And I think one of the things that we've been seeing in the podcast series so far is that it seems to be falling into one of two camps that actually the situation that we're finding ourselves in is creating lots of opportunity for learning professionals to experiment. We've certainly seen that in some of the podcasts that we just recently recorded. But equally Lori, to your point, we're also seeing a lot of people increasingly over LinkedIn, it's heartbreaking, where we're seeing whole teams of learning professionals being followed or having decisions to make, to cut 30, 40% of their L&D teams. There are some big decisions that are going on in learning and development. I mean, there's just two, but guys do you see any other types of decisions that are having to be made by learning professionals right now? Lori, what are you seeing with your clients?

#### **Lori Niles-Hoffman:**

Yeah. Well, the one that you say about teams are being furloughed or they're having to make those decisions, that's when L&D has to fight for its life and where they need to step up and look at their strategy. And in some cases, it is heartbreaking. In others, I will say, perhaps there was some fat to be cut where you can be more aligned and invest in other skills that are going to move you forward. I think the other thing too, that I'm seeing is leadership either sees the value of L&D or they don't, and they're going to possibly put a lot of pressure on L&D, especially if they do see the value and that's going to be a very difficult dynamic if L&D is not prepared to answer the call.

#### **Laura Overton:**



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Dave as well from your side of things, what kind of decisions do you see being made? Either being made by learning and development or being made on our behalf as Lori has just suggested?

#### **Dave Buglass:**

I think what triggered me a little bit at the start of the year when they started was that whole total call to arms. It's like, "Now is our time, now is our time." When it's always been our time. It's always been our time as professionals to be able to influence the leadership and organizations.

#### **Dave Buglass:**

And I've grown up in a world when I've been working where, I've had lots of chief executives tell me that people are the most important asset a business has, and maybe in the past, that's not been the case. They haven't really seen that through but today people are probably the most important asset we have and possibly some of these L&D functions, and not all of them in fairness, that are finding themselves in a little bit of a tougher timer, they may be still working with chief executives who still don't really, truly understand the value of what people actually are and how they can actually help a business go forward, Are these L&D functions that are struggling, are they part of the HR functions that are struggling?

#### **Dave Buglass:**

So sometimes I find it quite frustrating that we separate almost HR and L&D when actually together consequently, we're responsible for the people proposition. So I think probably some of these guys that are suffering at the moment maybe suffering from the fact that we're just not close enough to the business and to the point of this podcast, we're maybe not making a really compelling business case and a reason for why we should exist in the first place.

#### **Laura Overton:**

Yeah. And this whole thing about actually being able to make our case for change is something that is such a struggle for us. And I've certainly seen it in my career when people are trying to make the business case for originally new platforms or new technologies, or just doing something differently or even more recently we had Rachel Hutchinson from Hilti making the business case for actually thinking differently about the way that learning is created within an organization and supported and facilitated that isn't just about formal courses. These are all decisions that people have to make. So Lori, I know you're an advocate about making the business case. What does it actually mean to you? If I say you've got to make a better business case, what does it mean for you?

#### **Lori Niles-Hoffman:**

Well, it's probably easier if I start on what it isn't and the big thing that it is not, it is, it's not a plea for technology. It is not saying, "Mom, dad, I want a new car." Right? That is not what it is. And that's probably the biggest one that we see. Is that they're like, "Oh, if we have this technology, people are going to log in and we're going to have this type of engagement. We're going to have this, this, this, this." That's not it. The business case needs to be directly linked to the business goals of your organization. And what I say to any client right now is if you didn't know the business goals before, you should. And you also should be checking in now, because I can guarantee now that we're a quarter into the pandemic, those business goals have shifted.

#### **Lori Niles-Hoffman:**



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So you need to know what those are, and those are going to be your KPIs. That is your north star. So when you build your strategy, that's what you need to start with. So what I always like to begin with is, okay, let's look at our honest current state and don't be flattering about it because you want to be really, really clear on what it is and then say, "This is where we want to shift the organization, target how L&D is going to help specifically on each of those." It may not be technology, it may not at all. It may be, you're going to change people, you're going to change how you operationally function, how you use data, all those things, but that's what you need to be putting into the business case.

#### **Lori Niles-Hoffman:**

And that's what you have to treat it like a business and that's already in there. But I think, so often in L&D we get soft and fuzzy. No, you are, think of yourself as a company and you are adding ROI, and you're asking for an investment in your company. So what will that look like? It's Dragons' Den or Shark Tank, whatever analogy works, but that's what you're doing.

#### **Laura Overton:**

That's great. So basically hook on to the north star of the business as an absolute priority. Dave, I know you've done this before. I'm going to ask you. You once inspired me when we were running a program of work where we were looking at the finance sector, and you once inspired me about how you had a conversation with the CEO at the time about customer service. Tell us about your story about how you made that business case.

#### **Dave Buglass:**

It's funny that's just my absolute Jerry Maguire north star for my 20 years in this and it's just one thing I've never understood is why L&D professionals can't be more commercial and even not just L&D professionals, HR professionals, the business partner. So for 20 years plus in this, my simple head says, a business will always want to increase revenue, it'll always wanted to decrease costs. They'll always want to be more efficient and generate more production, and they'll probably want to increase capabilities. And in the 20 years I've been in it, they've been the same. So there's no real excuse for an L&D person not to.

#### **Dave Buglass:**

So the example at Tesco Bank that I would use would be, I remember, we were set up a challenger bank at the time, and we were probably not going to be the best challenger bank, we probably weren't going to have the best product ranges. And probably one of the things that we determined really quickly was that the way that we would win would be through customer service and to do that, we probably needed a really cool simple LMS and some really funky content. And we were going to do blended learning and all of this really bingo phrases that we as L&D professionals know we have to achieve. But when you're speaking to a chief executive who has an accountant and a board who take the lead from chief executive, that's not going to rock. And I remember very quickly working out that the best way to do it was almost to get round the chief executive and infiltrate the exec and try and find out little bits about what each of them individually would want in terms of their business.

#### **Dave Buglass:**

So if I was the credit cards chief director, I would want to make sure my product and proposition is as good as American express. If I was offering customer service, then I would want to make sure that we were offering may be as good as I don't know, one of the good guys out there they were doing really well at the time. And I guess when you look at these organizations who are performing really well, somewhere in that there's a people proposition and somewhere in that there's a really great learning story. And we went around trying to

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find really great examples of successful learning strategies and learning stories that help businesses succeed. So that when we were writing our business case and trying to win our case for investment, we didn't talk about the LMS, and we didn't talk about the content, we talked about how we could make the credit cards as great as American Express, or the customer service proposition as good as maybe Amazon or something like that, wherever it was at the time.

#### **Dave Buglass:**

And I don't think we actually had to use LMS, and we didn't have to use creative content at any stage during the discussions, but the numbers stacked up. And that was how we secured our investment. And I think for me, the learning in that was that we spent time trying to understand our business and I've had two HR directors. They've always said all along, know your numbers, know your business. If you don't know your numbers and you don't know your business, then you won't win the license to operate. And for me as an L&D guy, that's probably why I've been slightly different in my career. And that's why I get, not really get, but slightly frustrated at L&D guys who constantly talk about content and platforms and process and stuff like that. So...

#### **Laura Overton:**

Thank you. Lori. Have you had a situation where you specifically, you've had to make a business case for fundamental change? How did you go about it?

#### **Lori Niles-Hoffman:**

What I went about it is like Dave, I think that is excellent to really understand what the executives are thinking. You stalk them, look at their blogs, what are they posting? What's motivating them? What's keeping them awake at night? And feed into that. But I also think too, I like what Dave said there about know your numbers because L&D typically does not. We're not even managing our budgets effectively. We have it on spreadsheets or whatever, and everything is how long is a piece of string. We've got to get better at that. So a lot of my background has been in finance and they're bean counters. That is what they do. So you need to be able to say, definitively, if I produce X, it's going to cost this, it's going to have this impact and it will generate whatever, right?

#### **Lori Niles-Hoffman:**

You need to have at least some ballparks that you're able to tag onto or latch on to. The other thing too, is it's also too about data about what your current landscape is and what you want to change. And if you don't know that, they're going to ask you questions. Okay, so you've got this LMS. If they even know that they do. So how are people using it? What's happening? What are success stories? You need to have that data on hand to be able to just, but it can't just be, we would like to do this. This is not. So be very definitive, succinct as possible, but you need to speak like an executive. You need to speak at their level. Get rid of the 'learning-ese'. That's another too. Don't start talking about learning objectives. Just stop, no blooms, don't do it. But that's what will work.

#### **Dave Buglass:**

It's funny. I mean, I've been like that fundamentally all my career. And I had a light bulb moment I think at one stage. But then there was a girl that used to work for me and she used to really wake me up constantly on about this guy called Simon Sinek. Always went on Simon Sinek, always went on about the Golden Circle and it's like, so bored hearing about it. But one day after working out that I knew what my business drivers were, that whole reason

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why bit was almost the last little bit. So when we look at the reason why and what you're trying to achieve, I think that's another thing that L&D guys could do better.

**Dave Buglass:**

And I remember but I think it must've been about five, six, seven years ago now a long time ago, Deloitte did a report, the human capital report that used to come out every January. And there was a year where it tipped the scale and said that L&D had to be more like marketing, they had to be more like marketeers. At the minute an HR function typically used to be process control, people processes, people please, but that one year in that report, I remember being a bit of a light bulb for me when it said we need to move away from that. And we need to put ourselves in the shoes of the consumer.

**Dave Buglass:**

I mean, as an individual in the last 12 weeks we've probably spent in our house more on Amazon than we've ever done before. Straight to Amazon, didn't think we're on an LMS platform. We just ordered it, and it came. So we consume something that we needed and we knew why we needed it and it was done. And I just think some of that can have consumer behaviour, business case development stuff.

**Lori Niles-Hoffman:**

It's interesting you say that Dave because what I really like about that point is, I think, in learning, it's a funny business because everyone has taken 18 years of school or whatever. Everybody's gone through some education experience, so they think they know it and they think they can do it. And as a result, they have different expectations. So we almost start a point that if we don't disrupt, we will be disrupted. That's going to happen to us. And it's not going to be in the direction that we necessarily want to go. And that's a place that we need to be really cognizant of.

**Laura Overton:**

So do you think then Lori, that actually, if we're having to create a business case for change, we actually have to have a vision for what that change needs to look like to hook our north star onto the business north star, do you think L&D are good at that?

**Lori Niles-Hoffman:**

No. As I said before, I don't think they are because I think what they do is they rely on technology. That's their solution because it's an easy, that's the silver bullet and that's not it. I always challenge our clients to think about what would our strategy be if we have zero budget for technology, what are all things that we want to do? It's not a technical capability. I guess technology is an enabler and you need it to a certain extent, but the fact is you can do a lot without technology and it's going to be hard things. Those are the hardest things.

**Lori Niles-Hoffman:**

You may need to look really critically the skills of your team. Do you have who you need? Are they the ones who are forward thinking enough? Do you need to make changes? Do you need to upskill? That's usually 90% of the battle. Do you need to have different conversations with stakeholders so that they understand that you're not just the order takers and what does that look like? These are perennial decisions that would come up time and time again, that a lot of L&D teams have still not tackled. And then they say, "Well, I want to build a strategy." Well, that should all be part of your strategy and you need to have that in it, otherwise, this fancy piece of technology you want to buy, is like buying a race car and you

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don't know how to change a gear, or you're going to get the race car and drive it like an 80 year old gripping the steering wheel. So that's where we're not good at that.

**Laura Overton:**

Yeah. I think I would actually agree with you when I was running the Towards Maturity (now Emeralds Works health check) for all of those years. That's what we found out. Everyone wanted the technology, but never did we find there was a correlation between technology and business results. It was always about how we went about the business of learning, which was so critical. And I think there's a challenge right now is that we're being asked to have more and more orders in this pandemic.

**Laura Overton:**

We discussed this before. We want more online, we need more virtual classroom, we need more, more, more. And so actually we've been flooded with orders. And often we found in our research program was that sometimes the business doesn't understand what they should be asking of us. So they are asking for us to make a business case, but actually they expect it to be full of courses or full of online or full of 'micro' or 'E' or 'gamified' content. So I think there's a real challenge for us as an industry.

**Laura Overton:**

I mean, Dave, from your perspective, what would you say is the key thing that we need to be hooking onto as learning professionals if we want to challenge what the business believes about it. If we want to really make a case for change, how do we go about doing that?

**Dave Buglass:**

I think for me the big opportunity for us as professionals that storytelling ability you now need to take a step back and you now need to go and speak to the customer and try and work out what they're trying to achieve. And then you need to connect what you've got with what they want and actually make them feel secure that we can actually help them.

**Dave Buglass:**

So we know that they're not going to spend tons of pounds and euros, whatever dollars in the next 12 months at PWC. The big thing for us this year has been we're going to have to sweat our platform, sweat the analytics, sweat the content and make it more PWC than previously it was before this pandemic started. So I think that finding something that's gone well in the firm, finding something that we've influenced. I mean, telling that story like mad to the learning community within for us inside PWC, but for us in profession externally. And I think this is what things we're doing today the three of us, this is where this is really good.

**Dave Buglass:**

This has been one of the major achievements of the pandemic that we don't want to throw in the bath water when we go back to hopefully living normally. We want to continue doing Zoom, we want to continue doing podcasts, we want to continue getting experts because Lori and I will be the same. We'll probably say some stuff today that's right, and we'll probably say some stuff that people don't agree with. That's absolutely fine. It's all about opinions.

**Dave Buglass:**

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But I just think that storytelling Laura, that listening skill that maybe I don't think L&D professionals or HR professionals use very well it's in there, but I don't think we switch it on a lot of the time. We constantly are infatuated by the latest thing, whether it be technology and content, when actually, if we go and ask the business what they want, they maybe just want the water coolers and the corridor fixed rather than the 20 million pound learning management system that offers the latest virtual reality content. So for me listening and celebrating the stories and successes that are going on in your firm at the moment.

#### **Laura Overton:**

That's great. Thank you. But Lori, you are nodding away there and it's clear that we shouldn't just be making the case for technology. But what are the elements of a good business case for change? If you are going to be a manager right now and you're learning CLO has come to you with a case to actually do things differently, what would you expect to see in that business case? How can we make the argument? Obviously looking at stories, what kind of structure, what kind of flow would really do it for you?

#### **Lori Niles-Hoffman:**

So the thing that it is, is essentially, with the business case, is not just that you're going with the begging bowl for money. That's not it. What a good business case is in my opinion is it's telling C-suite how to best use their L&D department, which they aren't doing right now. So you have to frame it in that space. So when I look at what do I want to see in a business case? First thing is I do want a detailed review of current state. You need to know where you are that needs to be your base. Because without that, you're on shaky foundations. You need to know exactly where you stand now and, in a way, that it translates for C-suite to comprehend. Then just as I've been saying, "Okay, these are the business goals." And I would align each business goal and say, "What specifically is L&D going to do to tackle each one of these?" Right?

#### **Lori Niles-Hoffman:**

And as Dave mentioned, every business doing same thing, save on revenue, decrease costs, all that sort of stuff, but whatever they are, what are you doing specifically? And that then also needs to be an ask. And this is something that we leave out in L&D business cases. We always think the ask is the money, it's not. The ask is going to be and I'm speaking generically. But usually what I see in business cases, the ask is going to be, I need the permission to restructure my team, okay? And I'm sorry to say, because I know these are tough times, but you're probably need to restructure. That's going to be once. You need to have that ask in there, you need to have the ask also too to say you need to support L&D in these ways.

#### **Lori Niles-Hoffman:**

It might be that when we say no to something, we are supported, that doesn't get escalated. You're not allowing a shadow L&D. So all of these asks need to be put in there because that's also too inherently part of the business case. And you need to have that discussion in there. So that's quite important.

#### **Lori Niles-Hoffman:**

Final thing then you do want to say is being realistic about what L&D can and cannot impact, right? Because you're going to get yourself tied to some KPIs, and you're going to need to, and that's why I said the ask is also very important because L&D will not do it on its own. So

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you need to be careful with those, okay. So not making sure you overpromise and underdeliver, but at the same time, you do need to put some meat on the bone so that they do see where you are going to take them.

**Lori Niles-Hoffman:**

And lastly, also to the accountability for L&D that we don't typically put in the business case, what are we ourselves going to do? And that's not just number of courses. I don't care about number of courses, and that should not be at all the metric you're looking at, but what are you going to do as a team? And so those are the things I want to see in a business case.

**Dave Buglass:**

I would concur with all of those Lori. And the only thing I would add Laura would be when you're in an organization like mine or similar, sweat your suppliers because actually what you're maybe trying to achieve, one of them will have tried that somewhere else. And whether it's been successful, or not being successful, ask them. And far too many organizations use the suppliers as suppliers and not partners. And I think we live in a world whereas we're all fighting top end see if we're a bank, behind the scenes at our end, we share. And there are lots of success stories in different firms and different organizations where I think we can help each other whilst retaining competitive advantage. So that would be possibly the only one thing. But I would concur with what Lori was saying, a really sensible structure.

**Laura Overton:**

I think then you've both reflected on the fact that actually, it's not just you as the head of learning and development creating this case. You talked Dave earlier about how do you work with the other stakeholders in the business to identify what's important to them, working with the suppliers, you talked about using data from within the organization. Is there any source of input that we've missed out in the conversation so far Lori you're nodding tell us?

**Lori Niles-Hoffman:**

First of all, I always say that IT is the best friend that L&D never had. And even though this isn't a technology transformation, you still want to have them involved. They're going to be the ones who can make or break. And also too, these are people who do transformations on, we may be doing L&D a big transformation if you're within a company two or three times a career. These people make a business of it, especially a CIO or a head of IT. So really have that close relationship with them.

**Lori Niles-Hoffman:**

The other people that when we don't have a relationship with which we should, because we can leverage so many of their tools is marketing and communications. There's a ton of overlap and that relationship needs to get sorted out. You need to be really clear and this was something we were advising even at the beginning of the pandemic is don't go off and build anything until you've had that conversation with marketing and comms, because that person at the other end, they're drinking from a fire hose and you need to figure out what is the flow of information to them, because all three of us are hitting them. And we need to make sure that we're not duplicating efforts, that we are consistent, and that we are also to leverage technologies. Marketing will have a marketing automation engine, no reason you cannot use that to drip campaigns of learning. Communications will also know the best ways

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to reach employees, because they're probably not logging into your learning management system.

**Lori Niles-Hoffman:**

And lastly, also to HR. I mean, we have that relationship, but it needs to be in some ways more strategic. Talk to HR to find out what roles are they finding difficult to fulfil. And if they don't have that data go on LinkedIn for your company and see what roles have been sitting there for four weeks or more, that's a really good indicator of where do you need to be investing content dollars or at least some efforts. So those are all really, really good.

**Dave Buglass:**

It's funny. And the last one I would add again, so I'm enjoying bouncing off Lori here. But the last one for me would be writing a business case isn't for a week on Thursday, writing a business case is 365 days a year. So actually whilst that might arise during the year, I think that networking and building your internal stakeholder maps and just knowing the business every day of the week type thing. So I think probably why we've responded so well at PWC internally during the pandemic is that people I've started working with now had a really, really great network within the firm. We were probably able to respond very quickly with regards to making the things digital that needed to be made digital and could be made and supporting the business get through what this is a really difficult time.

**Dave Buglass:**

So we didn't get hit by the pandemic like everybody else. We were probably ready for something like this, just because we weren't prepared and we were always listening, which I think is surely quite important too. I think I was told years ago that you have two ears and one mouth and you should listen more than you should speak. So I think that is a skill sometimes that L&D people, not disrespectfully, but probably don't practice as much as they should. They talk a lot because they get excited and it's used as you know, but just listen at the business constantly, the drum beat, what's going on. I think that's equally as powerful.

**Laura Overton:**

I think it's really important because we train people on how to listen and yet we don't really apply what you've just said Dave. And if we did probably the elements of the business case that we needed to make, they would be there and laid out for us to be able to use. I'm really interested in your thoughts as well. About those people of learning and development who have been misunderstood and are now having to fight for their lives. They don't have the data to be able to show that they can hook on to the north star. Do you have any advice for those learning professionals who perhaps need to make a business case for survival in terms of a new future for themselves and for their teams? Any advice there Lori?

**Lori Niles-Hoffman:**

I think with that one, it's a sense of realism. And they've got to be really clear and inventory what they do have and what they don't have. And it may mean I hate the cliché of do more with less, but they're fundamentally going to need to shift themselves. And a lot of times, if I do look at my client base, the ones who are under attack or under threat, tend to be the more traditionalist who haven't spent the time keeping pace. And it pains me to say that, but it is a reality. So this is the time for those teams to realize that if they haven't kept pace or it's not just about technology and saying I don't have the data. It's also about how are you operating? Are you still just order takers?

**Lori Niles-Hoffman:**



## **Learning Uncut Emergent Series**

### **Lori Niles-Hoffman & Dave Buglass**

#### **How to Make The Business Case for Change**

Strategy is not technology. You can talk to people to find out what their needs are and start attacking the things that you can on a small-scale basis. I would even say at that point, rather than building a big huge digital strategy or business strategy. Is it now just about very practical, this is what we're going to do for the next three months to get us through? And we're going to see how L&D is able to contribute. We should all have the strategy. I love what Dave said about 365 days a year, we should be thinking that. So maybe that's not even where I would devote my resources to, I would be saying, "Okay, what can we do right now? And how do we become a revenue generating centre rather than a cost centre?"

#### **Lori Niles-Hoffman:**

And it might be really practical things like all of the courses that you have in your pipeline, those get put on hold and you're in favour of resources that you can get quick wins out there. It maybe you're looking at what are the pain points of the organization, and you're doing interviews with SME's and cutting them up and putting them up. It's got to be really, really tactical and tangible. And you're going to have to let go of things that you thought L&D was. You're not going to be able to do the big sweeping curriculum, it's not the time.

#### **Dave Buglass:**

There was a really famous phrase, knowledge equals power. And I think the more knowledge you had, the more powerful you were, and the further you got in the organization. And I think for these guys who or maybe having a tick about self-reflection and rethink about how they are. Knowledge equals power has now been replaced by almost the ability not to have to know anything. And what I mean by that is I don't know everything. I'm 49 years old on 15th September. I joined PWC alone But I know where to find it, where I need it and I know who you're going to ask.

#### **Dave Buglass:**

So I think these guys maybe need to put their tools down. They need to realize there's no major new inventions in technology, no major new inventions in content, and they maybe go back to basics and we'll find some of the people out there doing it well or winning awards, and even winning awards people, they're not winning awards for major, major change. And maybe some of them are doing it for some really simple initiatives that have been recognized as being simple. So be humble, realize that you maybe not where you need to be, because your views are not as modern as they could be. And I actually go back and find people that can help you out. And that's the power of the internet at the moment, it's the power of LinkedIn, it's the power of these vehicles that we're recording today. Go and find people that can actually help you.

#### **Laura Overton:**

I think that that is really sensible because I think one of the challenges as an industry that we have is that we feel if we can't show value for what we've done in the past, we don't have the confidence to ask for something new. And that's where looking outside the organization, whether it's for stories, whether it's for research. To be honest, it's one of the reasons I started up the research program that I did. That is still accessible through the Emerald Work site is the fact that other people have been there before you, and if you can use external evidence, external stories, to be able to say, if we could achieve just a fraction of this, is it worth us together shifting the models of the way that we do learning in the organization? And I think Jos Aretts was on one of the earlier emergent podcast talking about a shift in business models from becoming an order takers we discuss through a value creative.

#### **Laura Overton:**

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A value creation doesn't happen about what we do for the business. It's what we do with the business. And I think some of that evidence is out there for us to be able to use. I'm really aware that our time is just flying by with this conversation. And one of the things that we always like to ask you before you go in the emergent series is your advice either to yourself or to other learning and development professionals in the context of the business case. Lori, what do you recommend people stop, start and accelerate in this time in order to get the best business case.

**Lori Niles-Hoffman:**

Right. First one is it's a no brainer. The stopping technology first doesn't matter. That's not what it is. Start, what I would say is look beyond L&D. So look at other industries, look at how digital media operates, look at how other successful verticals who have pivoted through this time. Look to them. That should be something you should start doing right now, because they will have different perspectives. And accelerate if you haven't done it already right now is you need to really look critically at the skills of your team and get them to where they need or be making some decisions. Because you're not going to transform, or you're not going to make it through without doing that work.

**Laura Overton:**

Brilliant. Thank you. And Dave, what would you stop, start and accelerate.

**Dave Buglass:**

Stop phrases that spring to mind, over-engineer, theorize, invent new models, new ways, here's the latest news. Everything's invented. Let's just focus on what's already there. Start, I think we've talked about a lot and Lori has just alluded to it. Learn from others. Who's been there before, who's had successes. What did they do? How can we learn? And then accelerate is themselves. And I think L&D professionals and HR needs to speed up. Writing business cases that take forever long and project plans that take 12 months.

**Dave Buglass:**

We live in a world now where we're consumption-driven, and things change really quickly. So they need to be more. Minimum viable product, fit for purpose, get it out, get it in, and then learn and make it better.

**Laura Overton:**

Brilliant. Thank you. And thank you so much for helping us all learn and reflect on how to make a better business case a time where we really need it. As we're going to emerge stronger from the pandemic, then we need to challenge ourselves. But also we need to feel equipped to challenge the organizations that we're working within. And I think you've really given us some tools that we can practically use in order to take our vision forward, north star forward.

**Laura Overton:**

So on behalf of the listeners, let me just say Lori, Dave, thank you so much for joining us today.

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