

INTERACTIVE TOOL

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# The Ultimate C-Suite Conversation Guide for HR & Talent Leaders

**Build The Best Business Case  
For Your L&D Strategy In 5 Steps**





Presenting a compelling L&D strategy that resonates with C-Suite priorities requires preparation, but where to begin?

# We've got you covered.

HR and Talent leaders understand the value that L&D investment brings to their employees and organizations. However, making a strong business case for your L&D strategy and winning buy-in from C-level executives can be a challenge— especially when budgets are tight.

Our C-Suite Conversation Guide includes 5 actionable steps to help you ask the right questions, surface the right information, and build the best possible case for your L&D investment.

[Are you ready to get started?](#)

# The C-Suite Conversation Checklist

Before you dive into the guide, here's a checklist that previews what this tool will help you prepare for before and during your conversation with the C-Suite. Once you've gone through the guide, revisit this checklist to make sure you're prepared, and that your business case hits the most important points.

## Before the conversation ...

- Have I anticipated my C-Suite's specific priorities and directives?
- Have I studied available resources (earnings calls, annual/quarterly reports, cash flow statements, information on trends in sales, spending, and hiring) to understand the organization's financial situation?
- Am I prepared to explain to the C-Suite how L&D helps them achieve their goals?
- Have I anticipated and prepared responses to potential objections to my strategy?

## During the conversation ...

### Have I discussed how my L&D strategy:

- Saves money?
- Creates efficiencies?
- Aligns with business goals and objectives?

**Next: Learn the three investment objectives that drive C-Suite decisions**

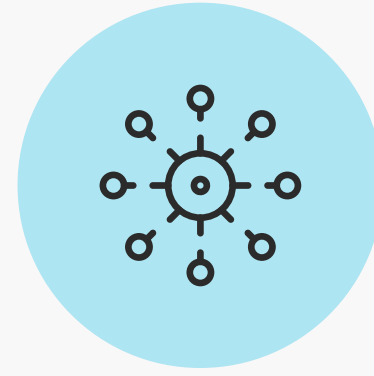
# First Things First: Understand C-Suite Investment Objectives

To make a successful case for investment in L&D, you must understand your C-Suite's framework for assessing investment decisions. Any CXO, especially CFOs, want to know to what extent an investment:



## **Saves Money**

by cutting spending, saving time, reducing the need for staffing, or replacing vendors



## **Creates Efficiencies**

by prioritizing resources that serve multiple objectives and have sustainable results



## **Drives Business Impact**

by aligning with key business goals to ensure every dollar and hour spent serves the bottom line

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Consider how to frame your L&D investment strategy within these three priorities, and what data you might use to support your case.

As you work through the 5-Step Conversation Preparation Guide, you'll uncover insights about your organization's business priorities and identify the key components of your L&D strategy that speak most directly to these objectives.

Okay, let's dive in.

# The 5-Step C-Suite Conversation Preparation Guide

## STEP 1

### Summarize the Context for the Conversation

Start by identifying your “knowns” and “unknowns” as you prepare for your conversation, and reflect on what has been successful or unsuccessful during previous strategic conversations with CXOs.

What key challenges and opportunities does your company face in the marketplace?

1

Assess your relationships with the C-Suite. Which members' perspectives do you already understand well, and which do you need to know more about?

2

Reflecting on last year's discussions, what difficulties did you have gaining support for your objectives?

3

In those discussions, where did you have success gaining support for your objectives, and with which CXOs?

4

## STEP 2

### Review Resources

To frame your L&D strategy as an essential value driver, first understand your organization's "big picture." Explore company resources to identify trends in sales, spending, and hiring. Are revenues trending up, down, or are they flat? What investments are being considered? What are emerging challenges and opportunities? What are predictions regarding future performance? By fortifying your understanding of your organization's business strategy, you can best align your L&D strategy.

#### What insights did you gain?

**Annual Reports**

**Company Financials  
(balance sheets, cash  
flow statements, etc.)**

**Other**



### STEP 3

## Engage Stakeholders

How will you engage with stakeholders in preparation for strategic conversations? Building relationships in the C-suite, particularly with financial and technology leaders, is essential. Identify three and briefly explain your objectives for the conversation as they relate to each.

**Stakeholder Name & Title**

**Why is this stakeholder a potential sponsor or champion?  
What do you want them to think/feel/do as a result of this conversation?**

1

2

3

## STEP 4

### Align Your Strategy

Now that you've learned more about your organization's "big picture", it's time to map your L&D strategy to your organization's business strategy. Identify 3 key components of your L&D strategy that speak most directly to your stakeholders' priorities. Then identify the problems or competency gaps each addresses, and how it aligns to your organization's strategy.

L&D Strategy Components	Business Problem(s)/ Competency Gap(s) Addressed	How does your strategy support the overarching business strategy?
1		
2		
3		

### Create Your Own Learning Collections

ExecOnline makes it easy to mix and match learning and coaching experiences to help you address your organization's specific skill gaps, business priorities, and talent objective.

[Learn more](#)



## STEP 5

### Support With Data

Your stakeholders will want to know that your strategy will result in positive business impact that can be measured. Take your 3 key components and identify the specific metrics you will use to prove that your strategy drives toward organizational business priorities.

#### L&D Strategy Components

**How does it benefit the company's performance? Does it reduce spending and/or increase ROI?**

**Which data will you use to demonstrate results, ROI, impact on environmental/social/governance concerns?**

1

2

3

### ROI Reporting with ExecOnline

Quantifying the impact of leadership development can be difficult. Yet it's essential to securing continued investment in empowering your organization's leaders. ExecOnline provides clients reporting that measures the ROI of leadership development through the lens of engagement, retention, productivity, and goal achievement.

# About ExecOnline

ExecOnline creates world-class leadership development in partnership with top business schools, experts, and coaches that builds leaders' capabilities by tackling real-world challenges

Our leadership development solutions elevate leaders and businesses through:



Self-paced programs with access to on-demand lectures anytime, anywhere



Guided experience that combines faculty and coach-led events with on-demand lectures



Leadership Coaching that drives personal growth and enhances organizational impact

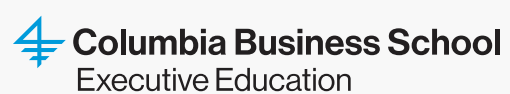


Insights to help track engagement and measure competency improvement and business impact

“

The programs that ExecOnline offers are fantastic in supporting our leaders and their individual needs.”

— Vice President Talent Management & Organization Development, Technology Company



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