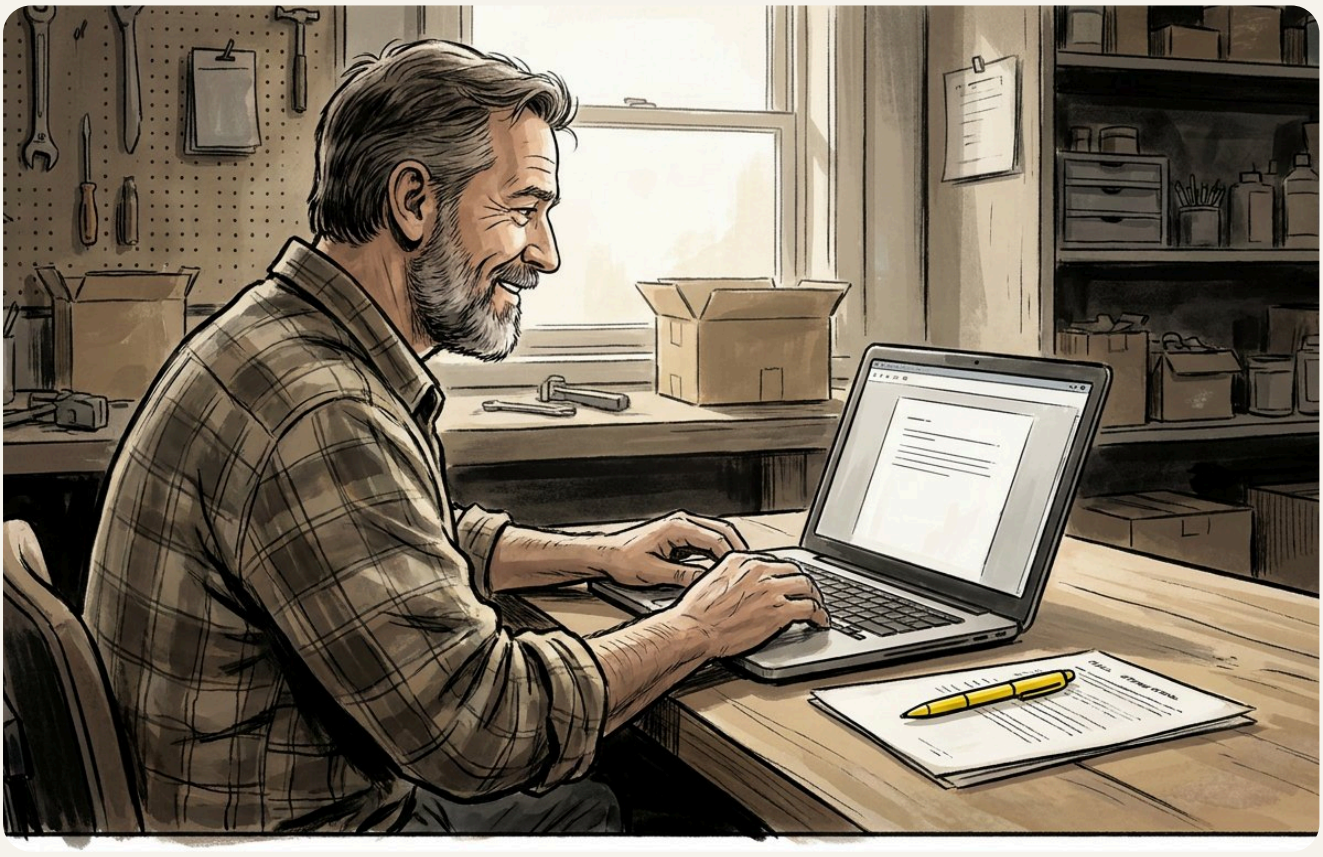
Online learning proposal and business case template

A fill-in proposal to take to your board, CEO or committee for approval of an online learning platform and your first courses. It includes a one-page summary and a worked costing.



Use this template to write a proposal your decision makers can approve in one meeting. Fill in each section, delete the guidance, and aim for four or five pages in total.

How to use this template

1. Read the tips on winning approval first, so you write for the people who decide.
2. Fill in the sections in order. The guidance under each heading tells you what to write.
3. Get a fixed quote for the build, so your costs are firm before anyone reads them.
4. Write the one-page summary last, once the full case is done.
5. Send the summary with the full proposal attached, at least a week before the meeting.

Tips for winning approval

Talk about their priorities

Link the proposal to something the board already cares about, such as compliance, member growth, staff turnover or income. Use the words from your strategic plan.

Start small with a pilot

Ask for one platform and one or two courses first. A pilot is easier to approve, and its results make the case for the next stage.

Name who owns it

Boards approve projects that have an owner. Name the person who will run the platform, and say how many hours a week it will take.

Give firm numbers

Use fixed quotes and the platform's published pricing. Mark every estimate as an estimate, and leave out figures you can't source.

Where to find your figures

- Discover Learning packages and fixed prices are on the packages page.
- Help with choosing between platforms is on the platforms page.
- Platform fees change often, so check the platform's own pricing page on the day you write the proposal.

One-page summary

Fill in this page last and use it as a cover sheet or board paper summary.

What we propose

The problem and who it helps

Recommended option

One-off cost and yearly cost

How we will measure success

Main risks and how we will handle them

Decision requested, owner and timeline

Section 1. The problem we need to solve

Describe the problem in the board's terms. Keep it short and specific, and use figures you can check.

What is the problem, in one or two sentences?

How do we train people now, and what does it cost us?

Trainer hours, travel, venue hire, printing, and staff time away from their work.

Why should we act now?

A new rule, growth, a funding round, staff turnover, a complaint or an audit finding.

Section 2. Who we need to train

Group	How many	Where they are	What they need to learn	How often
Staff				
Volunteers				
Members or customers				
New starters				

Note anyone with access needs, slow internet or low confidence with technology. The platform and courses need to work for them too.

Section 3. The options we considered

Boards expect to see the options you rejected and why. Compare at least these four, then say which one you recommend.

Option	What it means	Strengths	Drawbacks
Do nothing	Keep training as it is now.	Adds no new cost.	The problem in Section 1 stays and may grow.
Keep face to face	Run more workshops, or better ones.	People know the format and trainers are ready.	Trainer time, travel and venues grow with every person trained. Completion records are hard to keep.
Platform and DIY	We pay for a platform and build the courses ourselves.	Lowest cash outlay.	Staff must learn the tools and write the courses. Launch is slower, and quality depends on who builds it.
Platform with a Discover Learning build	We pay for the platform. Discover Learning sets it up and builds the first courses for a fixed price.	Live in weeks at a fixed price. A designer checks every screen.	Higher one-off cost than DIY. We still run the platform after launch.

Our recommended option and the main reason for it

Section 4. One-off and yearly costs

Show one-off costs and yearly costs separately. Platform fees are paid direct to the platform in US dollars, so show them in US dollars and note the exchange rate you used.

Your costs

Item	One-off (AUD ex GST)	Yearly	Source
Platform subscription		[from the platform's pricing page, US$]	Platform pricing page
School set-up			Fixed quote
Course 1			Fixed quote
Course 2			Fixed quote
Quiz and certificate			Fixed quote
Support or Care Plan			Fixed quote
Our staff time to run the platform			Our estimate
Total			

Worked example using Discover Learning prices

This example uses Discover Learning's published fixed prices. It assumes a basic school and two 30-minute courses built from slides that are ready to use.

Item	One-off (AUD ex GST)	Yearly (AUD ex GST)
School set-up, basic, live in a week	$2,000	
Course 1, 30 minutes from your material	$5,000	
Course 2, 30 minutes from your material	$5,000	
Quiz and certificate for each course, 2 at $900	$1,800	
Care Plan at $250 a month		$3,000
Platform subscription, paid to the platform		[from the platform's pricing page, US$]
Total for Discover Learning	**$13,800**	**$3,000**

How payment works

Discover Learning invoices half up front and half at go-live. Each course includes one round of edits, and an extra round is $750. If your slides need some work, a 30-minute course adds $3,750.

Section 5. Benefits we will measure

List benefits you can count before and after the change. Record today's figure now, and set the target once the pilot gives you real results.

Benefit	How we will measure it	Now	Target in 12 months
Fewer trainer hours	Hours spent delivering training each month		
Lower travel and venue costs	Invoices for venues, travel and catering		
Faster onboarding	Days from start date to finishing induction		
Proof of completion	Share of people with a completion record		
Wider reach	Number of people trained each year		
Income, if we sell courses	Enrolments and course revenue		

Benefits such as consistent messages and training that's open at any hour are harder to count, so list them separately from the figures.

Section 6. Risks and our responses

Risk	How we will handle it	Owner
People don't finish the courses	Keep courses short, send reminders from the platform, and ask managers to check progress.	
Staff lack time to run the platform	Name an owner with set hours each week. Consider a Care Plan for support.	
Content goes out of date	Set a review date for each course, and budget for one round of edits a year.	
Costs grow as users grow	Check how the platform charges for extra users before signing up.	
Learners lack confidence with technology	Test the first course with a small group, and give them a short how-to sheet.	
The platform changes its prices or features	Choose a platform that lets us export our users and records.	

Section 7. Data and privacy

Your board will ask where learner data is stored. Answer the question here before they ask it.

- LearnWorlds hosts data in the EU and TalentLMS hosts data in the US. Neither offers an Australian data region.
- List the personal information the platform will store, such as names, emails, course progress and quiz results.
- Check the platform's privacy and security terms against your privacy policy and any funding rules.
- Check the Australian Privacy Principles too, if they apply to your organisation.
- Decide who in your organisation can see learner records and who can export them.
- Tell learners how their data is used, in your privacy notice and at sign-up.

Our data and privacy notes

Section 8. Timeline

Stage	What happens	Date
Approval	The board or CEO approves the pilot.	
Scoping	We send our slides, hold a 20-minute scoping call and approve the course outlines.	
Set-up	The platform school is set up in our brand. A basic school is live in a week.	
Build	AI drafts the screens, a designer checks every screen, and we review once.	
Pilot	A small group completes the course and gives feedback.	
Launch	The course opens to everyone in the target group.	
Review	We report results to the board against Section 5.	

Section 9. Decision requested

End with one clear request. Say what you want approved, the budget, who owns it and when you will report back.

We ask the board to approve

For example, a pilot of one platform and two courses for $[ ] one-off and $[ ] a year, reporting in [month].

Project owner

Date we will report back

Get a fixed quote for your proposal

Send us your slides and we'll give you a fixed price for set-up and your first courses, ready to drop into Section 4. You can call 1300 208 943 or email info@discoverlearning.com.au.

Get a fixed quote

Discover Learning, discoverlearning.com.au, info@discoverlearning.com.au, 1300 208 943

A member of the Hungry Minds family. Bigger appetite? Hungry Minds designs and builds full programs. Learning to design? Instructional Design Australia.

General information only. Prices are Discover Learning's fixed prices in AUD ex GST as at October 2026. Check platform prices and features on the vendor site before you buy.

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