

HOW TO WRITE A PA TRAINING BUSINESS CASE

PERSISTENCE PAYS

If you struggle to convince your boss to invest in your professional development, don't give up; persistence pays. The best solution is to present a situational assessment of your training needs in the form of a business case for PA training.

It is not enough to have access to the best PA tools: you also need access to the best PA / EA refresher training. As a PA, your daily contribution to your boss's productivity is substantial and most executives are well aware of that fact. If executives understand the value of their own time, it is easier for them to understand the true value of an Assistant and the significant return on investment PAs represent.

TAKING THE EMOTION OUT OF PA TRAINING REQUESTS

Executives do not hesitate to approve training for other professionals in their organization, such as Accountants, but they often fail to get behind the professional development of their Assistant. They may even argue that they are the best judge of their Assistant's effectiveness. Although this may be true in terms of performance against stated objectives, their Assistant may be falling behind in terms of best practice strategies and time-saving techniques.

Using a business case is a rational way to approach a request for PA training. It takes the emotion out of the situation and presents the facts. Rather than fighting the battle alone, PAs can take a corporate approach and work together on a business case for in-house PA training – leveraging strength in numbers and economies of scale. This also puts each executive under greater pressure to sign off his/her PA's training because who would want their PA left out of corporate PA training when everyone else's PA is attending.

WRITING A PA TRAINING BUSINESS CASE

Here are some instructions for writing a business case for PA training and a list of points you should include.

REQUEST DESCRIPTION

Start with a request description outlining the name of the course, the date(s), the location, and the price.

SITUATIONAL ASSESSMENT

The situational assessment outlines the issue. It should state why you think you need training, and provide a summary of your duties and any changes in your work situation that necessitates further training. You should also mention the approximate date of the last PA training course you attended. Use bullet points to show which skills will be enhanced as a result of attending the training. Summarize the course aims and

include the course outline. This can be cut and paste from the seller's website.

COST/BENEFIT ANALYSIS

The cost/benefit analysis should show how improvements in your skills will amount to a cost saving for the company over a period of a year. For instance, if you manage 5 email inboxes and you would like to attend a course that teaches time-saving inbox management strategies, your productivity in that area should increase. This will positively impact costs because you will spend less time on inbox management and have more time to spend on other tasks, which will increase your productivity. You can base your cost/benefit analysis on more than one task/skill.

PRESENTING YOUR COST/BENEFIT ANALYSIS

The following format is one of many formats you can use to illustrate cost/benefit. You can break down the numbers in a way that works best for you. (Google a "Business Days Calculator" to help with calculations.)

1. I earn [£??] per day and [£????] per year.
2. I currently spend an average of [?] hours per day managing 5 email inboxes, which amounts to [??] hours spent on email management per week and [???] man/days per year.
3. If this training gives me the techniques and ideas I need to reduce the number of hours spent on email management from [?] hours to [?] hours per week, this would be an annual time-saving of [??] hours, which amounts to [£???] per year.
4. The cost of the requested training is [£???]

IMPLEMENTATION

State that you will use an action plan list to implement what you have learnt. And that you will discuss improvements and any proposed new systems with your boss upon return to the office.

CONCLUSION & RECOMMENDATIONS Briefly summarize your suggestion regarding your recommended training provider. Include their special expertise, recommendations from peers and testimonials.

TRAINING INVESTMENT BENEFITS

Use bullet points to remind the reader about the benefits of the training investment. List advantages like improved performance, increased productivity, improvements in your boss's productivity, and increased PA know-how. Finish your business case with a respectful recommendation that the PA training be approved and the registration fee signed off or reimbursed by the company. Then sign and date the document.

MEETING YOUR EMPLOYER HALFWAY

If you have been refused training in the past by your employer, your options may be limited. If you're really serious about updating your skills and moving things forward, consider meeting your employer halfway. Everything in life that is of value comes with a degree of sacrifice. Here are some alternative strategies for obtaining approval of your training requests.

1. Self-finance and ask your employer to approve the time off as working time.

2. Part-finance with a 50/50 split of the cost with your employer.
3. Ask your employer to finance the training but offer to take the time off as annual leave.

Good luck!

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