

MAKING A GOOD BUSINESS CASE FOR PA & EA TRAINING & MENTORING

If you think the answer to your request for PA training or mentoring is going to be "no", use the following ideas to present a convincing business case.

Your Company's Needs

Say that businesses use outside expertise for the following reasons.

- Make better decisions
- Save time and money
- Avoid costly mistakes
- Innovate and stay ahead of the competition
- Be more efficient and profitable

Your Objectives

- How will your training objectives prepare you for the future?
- Tie key learning outcomes with your performance review objectives
- Tie key learning points to the fulfillment of your 1-yr or 5-yr professional development plan
- Tie learning outcomes to your company's mission/goals
- Mention how the training will further the team's objectives

Course/Mentoring Content

- List main modules [*state what type of problem(s) they will solve*]
- State type of delivery [*classroom tutoring, group case studies, role-play, face-to-face mentoring, phone calls*]
- The course workbook / Action Plan: [*Say that the comprehensive information in the workbooks / Action Plans will be used as a PA/EA referencing tool, and for implementing best practice.*]

Follow-up Activity

- Courses: free PA/EA mentoring (*9 months for 3-day courses. 6 months for 2-day courses. 3 months for 1-day courses*)
- You can choose to be subscribed to Personal-Assistant-Tips free monthly newsletters and be kept informed through their extensive social media activity.

Prices

- State early bird price
- State standard price
- State applicable taxes (are taxes included in price?)
- State the monetary value of any discount you have negotiated

Extra Benefits

- 20% off future courses/mentoring programmes for all attendees

Trainer/Coach Qualifications and Background

Who is the trainer and what qualifies them to train/mentor you?

See bio of Marguerita King at:

http://www.personal-assistant-tips.com/About_US.html

- Provide outline of trainer's experience and qualifications
- Include accolades: [*such as "PA guru", "Wikipedia of the PA profession"*]
- Other attributes: [*"international trainer", developed 5-star training programmes*]
- Courses/mentoring programmes typically rated 5 out of 5 for "excellence"
- Cut and paste some testimonials from trainer's website

How Will You Add Value?

- Return on investment [*Say that given all that is mentioned above, Assistant training / mentoring will be an investment as opposed to an expense.*]
- Say how you will share what you have learnt with other Assistants [*By mentoring other PAs or sharing best practice within internal PA network*]
- Personal development/growth [*By focused development of your personal brand so that it becomes a greater asset to the business*]

If You Suspect The Answer Will Be “No”

- Offer to take a day or half-day of your own time for the training
- Offer to pay for the hotel if they pay flight & registration fees
- Consider self-investment but make it really clear at your performance review that you were so serious about continuous development that you self-financed it.
- Suggest in-house training for your entire PA support team, which is half the standard price per person for groups of up to 8 Assistants
- State options for dates of attendance” *[If you are requesting in-house training, suggest non-consecutive days or a series of half-days]*