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COURSE BROCHURE

Learning Investment Appraisal for HR and Finance Leads Training Course

7 – 11 December 2026
Vienna

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Learning Investment Appraisal for HR and Finance Leads is a 1-week training course for L&D managers and finance-minded HR leads who must defend learning budgets in the language of the finance committee, and each participant leaves with a learning investment appraisal file for one live initiative. As boards scrutinise every people cost, appraisal that links needs, evaluation and monetary benefit decides which initiatives survive. The course reflects how Jupiter Prime Training approaches Learning Investment Appraisal.

Why Learning Investment Appraisal Matters Now

Three groups shape the subject today: finance committees that rank learning against capital projects, line executives who want evidence that capability spending moved their indicators, and auditors who question soft claims of benefit. Organisations that appraise learning well redirect funds from weak initiatives to strong ones; those that cannot are cut first when budgets tighten. The course rests on the Kirkpatrick four-level evaluation model and the Phillips ROI Methodology, which adds return on investment and isolating the effects of training, with ISO 30422:2022 framing the learning process.

Who Gains Most from Learning Investment Appraisal

- L&D leads presenting yearly learning budgets to finance committees
- HR business partners sponsoring leadership or technical academies
- Finance business partners assigned to the people function
- Owners of large compliance or onboarding initiatives
- Analysts who assemble people metrics for executive dashboards

An HR function that sends an L&D lead and a finance partner together gains most, because both return using the same appraisal logic and assumptions.

Learning Investment Appraisal Capabilities

Participants practise building a chain of evidence from the original need to a defensible monetary figure.

- Align each learning initiative to a business measure identified in the needs analysis — the finance committee
- Design an evaluation plan covering reaction, learning, application and impact — initiative owners
- Apply isolation techniques such as control groups and trend lines — sceptical executives
- Calculate monetary benefits from output, quality and time data with stated assumptions — auditors
- Calculate the benefit-cost ratio and ROI percentage from fully loaded costs — budget holders
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Communicate results, including intangible benefits, in a short appraisal brief — senior sponsors

Key Learning Investment Appraisal Terms

- Fully loaded cost — every cost of an initiative, including design, delivery, participant time, venue and evaluation.
- Isolation of effects — methods that separate the share of improvement caused by learning from other influences.
- Benefit-cost ratio BCR — monetary benefits divided by fully loaded costs, showing value returned per unit spent.
- Return on investment ROI — net benefits divided by fully loaded costs, expressed as a percentage.
- Standard value — an agreed monetary figure for a unit of output, quality or time used in conversion.
- Intangible benefit — a real outcome, such as engagement, that is reported but not converted to money.

Learning Investment Appraisal Day by Day

Day 1: Finance Committee Expectations

- Capital Allocation Logic — How Learning Competes With Other Investments
- Needs-to-Measure Alignment Map — Linking Initiatives to Business Indicators
- Kirkpatrick Four-Level Evaluation Model — Choosing the Depth Each Initiative Deserves
- Phillips ROI Methodology Overview — Adding Isolation and Monetary Conversion
- Appraisal Candidate Selection Criteria — Deciding Which Initiatives Warrant Full Analysis

Day 2: Evaluation Planning and Data Capture

- Data Collection Plan Template — Assigning Measures, Sources and Timing
- Application Follow-Up Surveys and Action Plans — Evidencing On-the-Job Use
- Business Impact Data Sources — Extracting Output, Quality and Time Records
- Baseline and Post-Initiative Measurement — Establishing a Fair Comparison
- Cases From Logistics and Healthcare — Testing Plans on Real Initiatives

Day 3: Isolating Effects and Converting Data

- Control Group Arrangements — Separating Learning Effects From Market Shifts
- Trend Line and Forecasting Methods — Estimating What Would Have Happened Anyway
- Participant and Manager Estimates With Confidence Adjustment — Conservative Attribution
- Standard Values and Expert Input — Converting Measures to Monetary Benefit
- Fully Loaded Cost Worksheet — Capturing Every Cost Category

Day 4: Calculating and Testing Returns

- Benefit-Cost Ratio and ROI Percentage — Computing the Headline Figures
- Sensitivity Testing of Assumptions — Showing How Results Hold Under Scrutiny
- Forecast Versus Actual Appraisal — Approving Before and Reviewing After
- Intangible Benefits Register — Reporting Outcomes Not Converted to Money
- Credibility Rules and Conservative Standards — Withstanding Audit Questions

Day 5: Practising the Learning Investment Appraisal File

- Alignment Map Applied to a Participant Initiative — Confirming the Business Measure
- Isolation and Conversion Choices Defended in Peer Review — Strengthening Attribution
- Cost Worksheet and Return Calculations Finalised — Checking Every Assumption
- Two-Page Appraisal Brief for the Finance Committee — Presenting Results
- Learning Investment Appraisal File Completion — Ready for Budget Discussion

Applying Learning Investment Appraisal After the Course

- Choose one current initiative, build its needs-to-measure alignment map and agree the business indicator with its sponsor.
- Complete a fully loaded cost worksheet and forecast benefit-cost ratio for one proposal before the next budget round.

Learning Investment Appraisal Questions FAQ

What is learning investment appraisal, and why does it matter now?

It is the practice of judging a learning initiative as an investment, from need to monetary return. It matters now because finance committees compare learning budgets directly with other spending.

Which roles gain most from learning investment appraisal?

L&D managers and HR leads who present budgets, plus finance partners supporting the people function, gain most.

How does learning investment appraisal differ from a training needs analysis course?

It covers the whole chain from need to evaluation and financial return. A needs analysis course stops at identifying and prioritising gaps, without isolating effects or calculating returns.

What do you bring back from learning investment appraisal?

You bring back an appraisal file for one real initiative: alignment map, evaluation plan, cost worksheet, return calculations and a short brief.

Learning Investment Appraisal: The Way Forward

The learning investment appraisal file first informs whether one initiative is expanded, redesigned or stopped at the next budget review. L&D leads, finance partners and sponsors use it to agree assumptions in advance. After its first use, revisit which isolation method convinced the finance committee and apply it as the default for future initiatives.