How to build a business case for EA team training

Getting development for your assistant team funded, approved and taken seriously.

Making the case internally? Our free guide walks you through the framing, the numbers, and the language that lands with leadership.

Most organisations invest in leadership development every year and overlook the team that makes their leaders effective. This is rarely a deliberate decision. It happens because nobody puts a case in front of the budget holder. This guide shows you how to build that case: the framing, the numbers, the structure and the answers to the objections you will meet along the way.

Why this case is worth making.

The team that multiplies your leaders is the team nobody develops.

Executive assistants sit closer to the top of the organisation than almost any other function, and they are developed less than almost any other function. Sales teams are trained annually. Managers are sent on leadership programmes. Assistants are expected to arrive fully formed and stay that way, however much the role changes around them.

The cost of the gap is real but rarely counted. It shows up in three places, and none of them appears in a budget line, which is exactly why nobody protects against them.

01

Executives doing work their assistants could own.

02

Inconsistent standards across a team where each person has taught themselves.

03

Good people leaving because the organisation showed them no future.

> There is good news here. Because so few of these proposals are ever written, yours is unlikely to face any competition. In most organisations it will be the first case for EA development the budget holder has ever been given, and a well-made first case is hard to refuse.

You are not asking for a perk. You are pricing a gap the organisation is already paying for.

Do the groundwork first.

Four things to establish before you write a word.

01 Know whose budget it is.

Team training can sit with L&D, with HR, or with the executives your team supports. Find out which before you ask, because each owner needs a different case: L&D wants capability and consistency, HR wants retention, and executives want their own time back.

02 Time it to the planning cycle.

Most organisations set budgets once a year and review them each quarter. If your proposal arrives while next year's budget is still being planned, it can be given its own line. If it arrives near the end of the year, it has to compete for whatever money is left. Ask finance or HR when planning happens, and aim for that window.

03 Anchor it to a live business problem.

Connect your proposal to something the business is already dealing with: a restructure, a new leadership team, a push on AI adoption or a poor engagement survey result. Training proposed on its own looks like a nice-to-have. Training proposed as the answer to a problem leadership is already worried about looks like a plan, and plans get funded.

04 Decide the scale before someone else does.

Be clear about whether you are proposing a single training day, a programme over several months or an annual development commitment. If you leave the scale open, the budget holder will close it for you, and they will close it downwards.

The four arguments that carry weight.

You will not need all four. Pick the two that best match what your organisation is under pressure to solve.

Capacity at leadership level.

Every hour a better-equipped assistant takes off an executive is an hour returned to the most expensive people in the organisation. Multiply that across a team and the return dwarfs the cost of any training day. This is the argument to lead with, because it is measurable and immediate.

Consistency across the team.

When every assistant has taught themselves, every assistant works to a different standard. Training the team together creates one shared standard, so an executive gets the same quality of minutes, briefings and judgement whichever assistant they work with, and absence cover genuinely holds up because everyone works the same way.

Retention.

Replacing an experienced EA costs a multiple of what developing one does, and the loss of embedded knowledge is never fully recovered. Visible investment is one of the strongest retention signals an organisation can send, and assistants notice when every other function receives it.

Reduced risk.

Better judgement in the support function means fewer things missed, fewer decisions delayed and fewer problems reaching the executive at all. Boards understand risk reduction even when they hesitate over development spend.

The argument that does not work: *"the team would really value it."* It is almost certainly true, but it asks the budget holder to do the team a favour rather than make the business a return, and favours are the first thing cut when money tightens. Build your case on what the business gets back. The team's enthusiasm belongs on the training day itself, not in the proposal.

The one-page structure.

Your written case needs five parts, in this order, and it should never be longer than one page.

01 The problem.

Open with two or three sentences describing the gap in business terms. For example: executives are spending hours on work their assistants could own, standards vary across the team, or the organisation pays outside providers for capability it could build in-house. Do not mention training yet; name the problem first and let the reader feel it.

02 The proposal.

Then set out what you are proposing in a single paragraph: what the training is, who delivers it, which members of the team attend and when it would happen. Keep it brief. The full detail belongs in the provider's overview document, which you attach to the case.

03 The return.

Pick the two arguments from section three that best match what your organisation is under pressure to solve, and state them with numbers where you can: hours returned per executive per week, cost of a single senior departure, days lost to uncovered absence.

04 The cost.

State the full figure plainly, then put it in proportion by placing it next to a number the business already accepts, such as the day rate of one consultant or the recruitment fee for one replacement hire. Never apologise for the cost and never hide it in the small print; a buried number looks like a number you were worried about.

05 The measure.

How the organisation will know it worked: what the team will produce, own or stop escalating within three months. Offering a measure before anyone asks for one is what separates a business case from a request.

When they hesitate.

Three objections, and what is really being said.

"There is no budget for this."

Usually means: not in this pot, not right now.

Ask which budget it would sit in and when that cycle resets, then ask to be included in next year's planning. You have converted a no into a date. If the need is urgent, propose starting with one training day this year and the fuller programme next.

"Can't they just learn on the job?"

Usually means: I have never seen what a trained EA team can do.

They have been learning on the job, which is why every member of the team does things differently. On-the-job learning builds habits; training builds standards. Point to a function the organisation does train, and ask why the team supporting its most senior people deserves less.

"How will we know it worked?"

Usually means: help me defend this decision later.

Treat this question as an invitation rather than resistance: they want to say yes and need help defending the decision. Answer with the measure from your one-page case, which is what the team will own, produce or stop escalating within three months of the training. Offer to review the results together at that point. Once a decision-maker can point to a result, funding the next round becomes easy.

Almost no first answer is final. Teams that get funded usually asked twice, and asked better the second time.

Be part of the eavolution.

The case is easier to make with the proposal already written.

eavolve designs and delivers development for EA and PA teams, from single training days to programmes built around your organisation. If you are putting a case together, talk to Emily first: fifteen minutes, no obligation, and you will leave with a clearer idea of what to propose, what it costs and how to frame it for your budget holder. We can also send you a tailored overview document written for the person who signs it off.

Book a call with Emily

Explore corporate training