

FREE GUIDE FOR ADMINISTRATIVE PROFESSIONALS

GETTING **APPROVAL** FOR TRAINING AND DEVELOPMENT

— *Points to Consider + The Power of Persuasion*



A guide from Office Dynamics International

A MESSAGE FROM

JOAN BURGE

ADMINISTRATIVE TRAINING PIONEER & VISIONARY

Dear Administrative Professional,

I'm giving you this advice from both sides of the desk. For 20 years I was an assistant, and I often had to persuade my own executives to let me attend a seminar or a conference. Since 1990, I've been on the other side, as the founder and CEO of Office Dynamics International. I understand how an executive thinks about this decision, because I make it myself, for my own team, all the time.

There has to be a return on the investment in an employee. Whether someone on my staff is attending a one-day workshop or a four-day conference, I expect them to come back with ideas and come back better at their job. I take training seriously, and I say that after more than 50 years in this profession, first as an assistant, and then as the person approving the budget.

Organizations that hire us to train their assistants aren't only spending money. They're giving up their assistant's time, too, and that's its own kind of investment. Before you can persuade someone else to support you, you have to be genuinely convinced yourself that you need and deserve this training. If you aren't sure of your own value, you won't be able to make the case for anyone else to see it either.

Use this guide to build support for your professional development, whether that's a conference, an onsite workshop, an online course, or something else entirely. Help your executive see why investing in your education is good for you, and good for them.

Joan Burge

BEFORE YOU ASK

A QUICK REALITY CHECK

70%

of employees say learning strengthens their connection to their employer, according to LinkedIn's Workplace Learning Report.

3x

is roughly the return organizations see within about a year and a half when they invest seriously in retaining their people, according to research cited by McKinsey.

Your executive already believes in ROI. This is simply that same logic, applied to you.

POINTS TO CONSIDER

CHOOSING THE RIGHT PROGRAM

VET IT LIKE A PURCHASE

Three questions matter most: who's teaching it, what you actually get, and what happens after.

WHO IS THE SPEAKER OR TRAINER?

01

What qualifies them to speak on this topic? Has the person leading it actually worked in the role, for real, for any length of time, across more than one organization? A broader perspective usually means better material.

WHAT IS THE VALUE OF THE PROGRAM?

02

Line up what you're actually getting for the registration fee: sessions, materials, meals, extra events like a welcome dinner. Content matters most, but these details are part of the real comparison.

WHAT HAPPENS TO THE MATERIALS AFTERWARD?

03

Will you use them as an ongoing reference, or do they disappear the moment the session ends? Is there any follow-up support, or is it a one-time lecture with nothing behind it?

DON'T LIMIT YOUR SEARCH

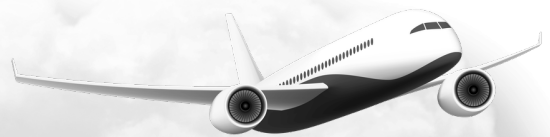
WIDEN YOUR RADIUS

The best program for your specific need might be virtual, might be out of state, or might simply not be the one your office already knows about.

Some assistants tell me they only look at what's happening in their own city or state. That's not how this profession works anymore. Executives travel constantly for the right opportunity.

Assistants who want to be seen as strategic partners should be willing to do the same, whether that means a flight to a conference or simply making the case for a live virtual program led by the best person for the topic rather than the closest one.

**DISTANCE AND FORMAT SHOULDN'T BE THE
FILTER.
FIT SHOULD.**



THE POWER OF PERSUASION

1

Know exactly what you want to accomplish.

List your objectives next to each topic in the curriculum, and connect each to your current job or the role you're building toward.

2

Consider your executive's viewpoint.

What would matter to them about you attending? How does this training benefit them, not just you?

3

Learn what motivates your executive.

ROI, specific skills, or a recognized expert. Figure out which one you're dealing with, and lead with that.

4

Match your executive's communication style.

Short and to the point, or full detail? Visual learner? Bring a simple chart instead of just talking numbers.

5

Connect the content to your actual job.

Don't stop at naming the topic. Say specifically how you'll use it, and who else it helps.

6

Know your fallback before you walk in.

If your executive doesn't already believe in personal development, it will take persistence. Don't give up after the first "maybe."

NONE OF THIS HAS TO SOUND SCRIPTED

the ask

“

"I'd like to attend [program name] next month. It covers [specific skill], which directly supports [something your executive already cares about]. The investment is [amount], and I'll come back and share what I learn with the rest of the team. Given what training like this typically returns, I think it pays for itself quickly."

SWAP IN YOUR OWN DETAILS. KEEP THE SHAPE: WHAT IT IS, WHY IT MATTERS TO THEM, WHAT IT COSTS, AND WHAT THEY GET BACK.

"I STILL GOT A NO"

A no on the first attempt is common, and it's rarely the end of the conversation. It's the start of a negotiation. Here's what to do next.

ASK WHY

Ask sincerely why they don't see this as a good investment. You may be able to directly counter that specific concern instead of guessing at it.

OFFER OPTIONS

"Would you rather I attend the program in [month] in [city], or the one that's fully virtual?"
Offer to share what you learn with the team.

NEGOTIATE

Ask your executive to cover registration and hotel while you cover travel, or the reverse. Get creative about how the investment gets split.

TIME IT RIGHT

If there's truly no budget until next year, ask when the next cycle opens and get your request in early, before it's already spoken for.

INVEST IN YOURSELF

If all else fails, self-fund it. Often it isn't a budget problem at all, it's not yet knowing how to sell the program to the person who controls the budget.

YOUR ONE-PAGE RECAP

Print this page. Run through it before your meeting.

- ☐ I can say what I want in one sentence.

- ☐ I've thought about this from my executive's side, not just mine.

- ☐ I know whether my executive responds to numbers, skills, or expertise, and I'm leading with that.

- ☐ I've matched the format to how they like information, short and visual, or full detail.

- ☐ I can say specifically how this connects to my actual job, not just the topic.

- ☐ I have a fallback ready if the first answer is "not yet."

- ☐ If it's a budget-timing issue, I know when the next cycle opens.

- ☐ If I get a no, my first move is to ask why, not to walk away.

INVESTING IN PROFESSIONAL DEVELOPMENT AND TRAINING IS ESSENTIAL

for administrative professionals who want to advance in their careers and add real value to their team and organization. Securing that investment can be challenging, but you now have a real strategy, and a recap you can actually use.

PICK ONE PROGRAM. RUN THROUGH THE CHECKLIST. SEND THE ASK THIS WEEK.

Looking for a more data-driven, KPI-focused approach to a specific request? Read our companion guide by Kayla Hutchens, Championing for Administrative Professional Training, at officedynamics.com.



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