

## **Gaining Executive Support** **by Wendy Mack**

Imagine that you and your team have an idea for a new initiative. You have requested, and have received, a 30-minute slot on the agenda for the next executive team meeting. You work nonstop for days to prepare a presentation that makes the case for your idea. Everyone on the team works long hours and late nights to prepare dazzling graphs and charts. You rehearse your piece until your delivery is flawless. When you arrive to deliver your presentation, you are told that the executive team has to deal with several emergencies and that you now only have 15 minutes to make your case. You do the best you can and feel that you managed to get your main points across in a convincing manner. However, upon concluding your presentation, no one in the room nods or smiles. After a few seconds of silence, the CEO says "Thank you. You've made some good points. We'll think about it and get back to you." You leave feeling dejected and dread telling your team that there is no news to report.

What went wrong?

In my work with change leaders over the past decade, I've seen some great examples of what works when it comes to gaining executive support. I've also been witness to more than one failure. To learn if there are generalizable best practices, I interviewed several vice presidents and executive vice presidents from private industry as well as several public sector leaders. I learned that managers looking to gain support tend to make avoidable mistakes that undermine their cases.

In this article, I explore the most common mistakes and outline more effective approaches.

### **Mistake #1: Expecting Immediate Support**

According to several executives I interviewed, team leaders and function heads often mistakenly conclude that one brilliant pitch is enough to gain agreement and buy-in. The reality is that support doesn't happen overnight. One government agency executive I spoke with mentioned that it has taken three to four years to build enough support to gain an increase in congressional funding. He used the example to illustrate the fact that managers need to take a more strategic and long-term perspective. He suggested that managers looking for support should:

- Build a case that shows how your idea will benefit the entire organization.
- Explore your case with peers from other groups/units. Look for ways to align priorities across multiple teams.
- Preview your case with executives and stakeholders. Invite input. Make changes.
- Make your pitch for funding only after you have taken the time to build support for your ideas.

## **Mistake #2: Getting Lost in the Details**

When mid-level leaders attempt to make a case for funding or other support, they often provide far too much information. Many pitches fail because executives don't have the time or interest to delve into every aspect of an initiative. Most executives don't want or need to know each and every task your team is working on. They don't want to have to weigh in on every decision.

The following are three best practices for making a case to the senior leadership team.

### **Use PowerPoint to summarize your main points.**

A PowerPoint deck is a great briefing tool because it requires you to summarize your points into brief bullets. Keep your points at a high level and mentally prepare stories, anecdotes, and illustrations to bring depth to the words on the page. Plan to spend no more than 3 minutes per page during your pitch. Bring backup information with you, but pull it out only in response to questions about the details.

### **Group your main activities, goals, or steps into "buckets" or categories.**

I recently saw one team leader list every activity his team planned to work on in 2009 in his pitch to executives. Instead of strengthening his case, all of the details turned off the executives he was trying to influence. One leader even spoke up and said, "We don't need to know all of your team's tasks. We just need to know your priorities."

I find it helpful to group goals or activities into categories. For example, you might say that in 2009, your team will focus on "cutting costs, streamlining processes, and developing bench strength." You could then list examples of goals in each of the three categories. This helps the executive team quickly focus on the strategic impact of your team's work and enables them to weigh in on whether they believe these are the right areas of emphasis.

### **Concisely summarize what you need from the executive team in order to move forward.**

Too many presentations to executive teams are "informational" in tone. The team or project leader provides an update and asks, "Are there any questions?" They hope (and pray) that the executives will somehow jump to offering funding and support – which almost never happens.

Instead, conclude your pitch with a slide that summarizes specifically what you need. This might be money, a decision, or dedicated resources. Yes, there is a risk that your request will be turned down, but it's better to know that now, than to keep spinning your wheels.

In the 1990's a team of external consultants worked with General Electric to develop a change acceleration process. The team came up with a four-step formula for effective elevator speeches:

1. Our project or initiative is about . . .
2. It is critical to the company because . . .
3. What this means for you is . . . .
4. Here's how you can help . . .

Use this approach both in one-on-one conversations with stakeholders and in your formal pitches and presentations. You will find that your ability to argue for your case will improve as you learn to focus on these key elements.

### **Mistake #3: Failing to Articulate the Return on Investment**

As a director of a function or a team, you are probably passionate about your work. The value of your group's work is obvious to you. Here's the rub: it's not obvious to the people you may be trying to influence. This is particularly true if you are in a function or area that spends money rather than generating it.

All too often, I see group leaders neglect to explain, describe, and quantify how their team's work impacts the overall bottom line of the organization. Many are confounded when they don't get the funding or other support they need.

Any time you are looking for support (whether is it funding or resources), come up with reasons why the leadership team should invest in *your* group and not one of the score of others who are competing for that same money. One executive I interviewed gave this advice: "To get more money, you need to be able to articulate the benefit you bring and why you deserve the money to be taken from someone else. Be able to explain what return we (the organization) will get from our investment."

Stumped about how to demonstrate a return on investment? You can start by engaging your team to look at each of your major priorities or goals and asking, "If we get this done, what impact will it have on the organization's . . ."

- Sales
- Costs
- Errors
- Production time
- Customer satisfaction
- Customer loyalty
- Ability to attract top talent
- Employee engagement
- Employee retention
- Brand recognition
- Stakeholder support

- Stockholder confidence
- Ability to meet regulations
- Ability to mitigate risks

If you aren't able to show a bottom line impact, interview some allies and advocates at executive levels to hear how they would describe the value your group brings. Keep pushing yourself and your team to hear and understand what your executives are looking for and be sure to describe impact in their terms.

### **Mistake #4: Failing to Be Strategic**

This is a crucial point when it comes to gaining support. Most executive teams have a vision for the future and a number of strategic goals in place to help the organization realize the vision. You are much more likely to gain support when you show how your team's plan will help to further the strategic goals. Doing this successfully means being able to read between the lines and understand what is important without waiting to be told what to do.

What does it mean to be strategic? In my experience, executives want their directors to:

1. Understand the organization's overall priorities.
2. Proactively suggest how their team can help the organization achieve its goals.

As Scott Eblin writes in *The Next Level*, you need to spend time with your senior executives up front to ensure that you understand what success means to them. Remember, though, that at this level, you aren't likely to get specific goals and metrics. Listen for priorities, for key organization-wide metrics, and major barriers or obstacles. Absorb what you hear. Discuss it with your managers. Then come back to your executive with specific plans about what your group or function will do and how you will do it. Be prepared to make adjustments based on input from your executive team at this point.

### **Summary**

In summary, keep your pitches short and crisp. Focus on strategy – not tasks. And be clear about what you need. Your executive team will appreciate your respect for their time and your eagerness to make the entire organization successful.

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