

# Presenting for Management Buy-in

by James Leong



with any change, there will be forces pushing for it, as well as forces resisting it. What you want to do is to maximise the forces pushing for it, while minimising the forces resisting it.

**It all starts with the facts and stats**

In managing a small company, the boss can manage with his eyes. He can see everything that's going on in his organisation—including all the bottlenecks and inefficiencies. When managing a large corporation, the bosses have to rely on reports, numbers and figures to tell them what's really happening on the ground. As the idea proposer and presenter, you may know intimately the many challenges your department faces, but the bosses may not. It is your job to tell them the real story and the starting point will be your facts and statistics.

**Put it into a logical structure**

To sell your story, you need a good story line. A good, logical structure to hold and float your ideas is needed. One structure you can employ to tell your story is the "Timeline" approach. A timeline comprises three distinct phases in time: past, present and future. Show them for instance, the number of projects your department is handling as compared to the number of staff in your department over a period of time. Calculate some KPIs (Key Performance Indicators) such as "Revenue per employee" and "Project turnaround time". If you do

*You need to ask management for more human resources to handle the volume of work in your department. Management is averse to increasing expenses. How do you present your idea to get a buy-in?*

**What is buy-in?**

The Encarta® World English Dictionary defines buy-in as "commitment to achieving a shared goal".

Quite often, when we propose an idea for management's approval, we tend to present only from our own perspective. In other words, how this might help our department, say, be more efficient, productive, reduce staff

turnover or enhance morale. The problem usually arises when management pushes back, frequently for cost considerations. This frustrates many managers and heads of departments who are in that unenviable position.

Normally this happens because managers fail to see the "big picture" that senior management sees. As such, there is no "shared goal" and hence management is not "committed" to supporting the idea, which usually involves an outlay of funds.

**How do we get buy-in?**

This starts from the preparation stage of your presentation. We need to understand the "Push-Pull" factor. When you propose an idea, it is something new which management has to deal with. In other words, they have to deal with the change you propose. As

your homework, the facts will show the evolution of the resource constraints your department currently faces and its impact on productivity and hence future revenue generation. This applies even though your department may not be revenue generating, as all support functions eventually have an impact on the top (sales) and bottom (profit) lines of a company through problems with bottlenecks, turnaround time and efficiency—all clearly measurable and demonstrable KPIs.

### Sell the Big Picture

The presentation of facts and statistics has the benefit of showing the logical justification of the constraints that's restricting your department's performance. It is important to use statistics **to emphasise the impact on the company overall**. Not just the impact on your department, but how it impacts the **profitability** or **cash flow** of the company as a whole. These are the two buzz words of management, so learn to speak their language. It is important, however, **not to get bogged down by the detailed statistics and facts**. They will work against you if you do that. Instead, use them to highlight **financial implications** on the company. Some of these implications may be **tangible** and measurable in the short term, such as profit and cash flow. Others may be **intangible** such as company's reputation, branding and market position. Be sure to emphasise these in your presentation.

### "Pleasure and Pain" Motivational Direction

Humans are drawn by what we want, and repelled by what we don't. At times we do things because we want to achieve certain goals. Other times we do things to avoid undesirable consequences. While stressing the benefits of your proposal, do not ignore the

importance of telling management the negative consequences of not taking up your proposal.

Think in terms of **impact statements**. In other words, do not stop at first order consequences, but present the ripple effects too. For example, over clocking of hours by staff may lead to high turnover, which leads to high burnout rate of existing staff, which leads to even higher turnover, which leads to lower productivity due to rehiring and retraining of new staff, which leads to lower efficiency and quality, which leads to unhappy customers, which leads to more rework, which leads to increase in service recovery time by senior management, which all lead to increase in expenses and lower sales, thus lowering profit and cash flow. When you could quantify all these, you have a winning strategy to get management on your side to achieve the shared goal for the organisation which is to help the company succeed.

### Stories sell

Adding in a short story or two that tells of your staff's predicament and their experience with irate customers will flesh out the human aspects of the difficulties faced by staff on the ground. While statistics and figures provide the logical support for your request, stories put a human face and emotions to the problems which makes them real and urgent.

### Prepare for objections

Always be prepared to deal with a push back by management and back up what you say. Do your homework by ensuring the root cause does not lie with your department, or that it could be fixed without incurring additional expenses. For example, the high staff turnover is not due to a morale problem in your department. Back up what you say with facts and

statistics, as this would show your level of thoroughness and preparedness. You are helping management to do their job easier, which is to perform a due diligence on your request. All they need to do is to make the decision based on all the information you have laid out. Help them to help yourself. Quite often objections arise because managers do not articulate their case clearly.

### Use words wisely

Be mindful of the words you choose. Don't couch your request for additional staff as an "extra" pair of hands. In the age of lean and mean, efficiency is the order of the day. Use "investment" instead of "expenses" and say "stay ahead of our competitors" rather than just trying to manage your department workload. ■



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