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Selling people management solution projects to the C-Suite

A guide to securing senior buy-in for your next people management software project.

Introduction

So, you've done your research and now you want to take that first step towards redefining your people management experience- all you need is help getting the project off the ground. You've consulted your team and know that you need a solution that's going to transform the HR department's impact on the business. Now you've just got to convince the people who can help make this a reality and who hold the purse strings.

This is where you really need to be on your game. You're likely to be competing against other departments for budget, so how do you ensure that your new proposal is taken seriously and championed by the C-Suite, and that you get the backing you need to move the project forwards? Every function within your organisation will have their own requirements and when you're warring over budgets and constrained resources, the trick will often lie in how you translate those needs into terms which can be understood by exec level talent within the organisation.

Don't worry, help is at hand. Having worked with countless HR Directors and other decision-making managers over the years to help them get their own projects over the line, we know a thing or two about how to ensure you walk out of that boardroom with the support you need. This guide will take a deep dive into how you can make the strongest case possible to the C-suite and demonstrate to them the transformative potential that an investment in people management solutions can have for your organisation.

Make sure your house is in order

Unfair as it may be, and although times are slowly changing, the HR team often needs to work harder than other departments to get its voice heard at the top table. You need to ensure those at the top can see the value of what you do, the return on investment in your department and the positive effect HR has on the wider business.

So how do you ensure your department is viewed positively before it's your time to present?

Up your communication game

Recognise that you probably won't have time to tell your whole story in your all- too-short slot. Be proactive in communicating any recent HR successes in the days and weeks building up to the board, and how with the right people management solution, you want to continue this travel of direction:

• Where has HR helped other departments meet objectives?

• Where has HR saved the business money / manpower / stress?

• How has HR taken the lead on big issues for the company?

You need your department's track record to pave the way to a conversation that positions HR as capable of leading change and adding demonstrable value to the business.

Take stock of ongoing challenges and targets

One of the barriers often present when sourcing a new solution is a failure to fully acknowledge how not only your organisation may have changed, but also the wider environment in which you operate. External factors such as macroeconomic crises have a way of fundamentally uprooting existing processes and highlighting potentially dangerous gaps.

When sourcing a new solution, take the time to consider:

• Your existing HR targets for talent attraction and retention

• Your targets for employee engagement

• Your employee wellbeing strategies

How are you measuring these key metrics?

Whenever possible, harness available data to back up your points. How are current gaps or inefficiencies holding the organisation back? If retention levels need to be at 80% for example, where are you currently? Have you projected the potential benefits which a new solution can bring? If you cant find the data, this is all the more reason to invest in a solution.

The C-suite will want to not only understand the fundamental nature of any roadblocks but also see how investment in digital transformation can help you support and empower people across every department to the best of their ability, and help them achieve their key metrics and KPIs. Build a clear-cut rationale for investment using data.

> **Our Advice: Ensure any departmental differences, or outstanding HR issues, are rectified**
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> You don't want to be blown off track by a board member raising a complaint or query about another HR topic, so do what you can to ensure any lingering issues are addressed before you walk into the boardroom.

Understand the wider business goals and how HR contributes

When HR doesn't have a driving seat at the top table, the broader business goals can struggle to find their way down to your department. However, if you're going to engage with the rest of the board as equals, you need to understand exactly what the business objectives are and how HR can help to achieve them.

In theory at least, this shouldn't be too difficult. HR is uniquely placed in that, through recruitment, performance reviews etc., it touches every part of the business in some way and should have a feel from this as to how the business is doing.

HR leaders innately understand the role their function plays in wider business operations but communicating that same need to people outside of your sphere of expertise may sometimes be challenging.

Even the most interconnected organisation operates in silos to some degreemaking your business case to the C-suite is about breaking down barriers and communicating current challenges and the benefits of digital investment, in terms which are universal and multi-level across the organisation.

The focus therefore should be on the part that HR plays in contributing to the wider health and ongoing success of the business and how it is an integral element of ongoing success.

The good news is that this is starting to happen: regulatory compliance, data protection and talent management are becoming increasingly strategic concerns for businesses in all sectors, and all three are areas where HR can add real value. And to do so, HR needs to be supported by the right systems and the right levels of investment.

Know your audience

The vested interests of the different decision makers

A key challenge when selling to the C-suite projects of digital transformation is distilling your core requirements into terms which not only are easily understood but also resonate with these various personas and their respective disciplines and expertise.

It doesn't necessarily mean that every aspect of the organisation will feel the need for a new solution as much as others- particularly not when compared to the HR perspective. We still believe that there is a common language to be invoked, regardless of individual focus. The C-suite all have a vested interest in the continued growth and success of the organisation.

Prior to any meetings, it's worth considering the priorities and requirements of these respective personas. Not only does this allow you to better layout your pitch but it also helps you remain agile to potential objections and pre- prepare responses.

On the next few pages we outline the key personas you need to convince and what their vested interests may be.

The technical expert

From the perspective of your IT teams, the technological nuts and bolts of how these solutions operate is of paramount importance to making software projects successful. The endorsement of technical experts can be the make or break point between a solution being a long term boon for an organisation or a flash in the pan idea.

People management software is fairly unique in that all levels of an organisation will be expected to engage with it in some sense on a regular basis, and from an IT perspective, this means that the smooth adoption, implementation and operation of any new technology is absolutely critical.

In many ways, IT teams are the most crucial arm of an organisation to pitch a new solution to. After all, the implementation and long term health of systems and technologies will largely be determined by their expertise. Understanding and demonstrating a commitment to overcoming their misgivings will go a long way.

Technical experts will want to see:

- **A strong focus on clear UI/UX** - The ability for end users to intuitively pick up a new solution and get on with core tasks will be a big requirement. Technical experts don't want their own teams bogged down with lengthy training or jerry rigging systems to make them usable by employees.

- **Cloud based hosting** - Cloud based functionality and remote access of solutions has evolved far beyond a nice to have and when going to market, IT professionals will need to understand how a potential supplier can help ensure that leadership teams and employees can stay connected without the need to engineer workarounds to help them access key systems.

- **Security** - Security is a primary concern for any IT professional. Data breaches and lapses in security of systems not only represent a huge financial and legal risk for organisations but they also impact the reputation of their IT teams. These concerns are compounded greatly when discussing people management and the hyper sensitive data that function deals with on a daily basis.

The financial decision maker

For Finance experts within an organisation a new solution can often represent little more than a hefty upfront cost. Whilst the specific need for a people management solution may be pronounced within HR teams or other areas of the business, it's all too easy for these requirements to be siloed away and not communicated effectively to other key stakeholders.

Fundamentally, the focus for Finance teams will be keeping costs down; long- term. Digital transformation of software can seem like a significant investment and during times when the wider cost of doing business is increasing, stakeholders will need to understand the tangible, long-term savings which a new solution can provide them through improving processes, introducing greater levels of efficiency and cutting back on unnecessary expenditure.

Finance experts will want to see:

- **ROI -** Unsurprisingly, one of the most important considerations for finance teams when looking at projects of digital transformation will be the ability to quantify and prove the real savings offered from a new solution. Where HR professionals will very much be concerned with functionality and the everyday challenges a new system can help them overcome, the scope for Finance is often much broader and the benefits of a new system has to be communicated in terms of spend reduction and overall savings to the business.

- **SAAS** - SAAS models are a popular and commonplace way of distributing software which are usually paid for via a subscription model. SAAS models are often praised for their ease of setup as with the software being distributed via the Cloud, this tends to reduce implementation times dramatically and means organisations can hit the ground running with using their new systems. For finance teams, SAAS based solutions help to greatly reduce costs by eliminating the need to pay out for additional maintenance services or urgent fixes.

- **Integration** - Finance teams are painfully aware that making the wrong call with a solution can mean an organisation ends up being burdened with mounting costs. For people management solutions in particular, the interplay of systems is of key importance. Consider how any potential solutions feed into one another and how this could benefit you. For example- consider your time and attendance function and how accurate time tracking and reporting should link seamlessly with your payroll function, ensuring a fast and accurate pay cycle each and every month. No more misspent wages!

The legal and compliance expert

Today, businesses have an increasing responsibility to handle data securely and the data held on your employees can be particularly sensitive. Your legal and compliance department will need to be convinced that any new platform stands up against current and future regulations and contributes to an improved level of data security and compliance.

When pitching to people from these disciplines, it's worth bearing in mind these considerations, specifically the wider impact of a new solution and if it will be agile enough to meet the demands of shifting legislation.

Legal and compliance experts will want to see:

- **Integration** - How your solutions interlink can be the make or break point which allows you to not only leverage meaningful data but also provide you with the peace of mind to know that your business won't have to lose hours each and every working week, troubleshooting data manually and running cross checks.

- **Payroll accuracy** - Accuracy with wages is crucial as any discrepancies or delays can seriously impact the financial wellbeing of your employees as well as affecting their levels of engagement and productivity at work. Inaccuracies can also lead to potential legal challenges which any organisation will be keen to avoid.

- **Dealing with changing legislation** - Regardless of sector, all businesses are beholden to strict regulations and compliance requirements. Sweeping changes such as those demanded by GDPR regulations have also demonstrated to businesses the need to be agile in meeting requirements. Outdated solutions simply don't offer the complexity and ability to suit these needs. Older systems can often mean that data is siloed away in unintuitive ways, making certification or proof of compliance with certain regulations far more difficult than it needs to be. They will sleep well at night knowing that your people management solution holds every single special listed GDPR category securely.

- **Compliance isn't just a legal box ticking exercise either** - Your payroll function can serve as the foundation of your organisation's rewards and benefits system. It is also reflective of your EVP or Employee Value Proposition. A well-defined EVP highlights your key strengths as a place to work and defines the specific qualities which distinguish you from your competitors when it comes to recruitment and keeping your best people. Identifying and eliminating disparities in wages such as diversity or gender based gaps can help position your brand more favourably alongside your competitors.

The key decision maker

Essentially, once the rest of the key stakeholders are on board, the final decision may come down to the CEO. With an obviously broader remit, they're likely to simply want to understand why this tool is needed and the impact it will have on wider business operations.

Hopefully, you'll have exposure to your CEO already and have agreed expectations of what your departmental goals are. You'll need to ensure that any major investment can be seen to contribute to your ability to meet those departmental goals.

These key decision makers will want to see:

- **Scalability** - Investing in a solution is a big commitment and one which is rarely worth it if you're buying into a system with little scope for growth. Your CEO will want to not only understand how new technology can help transform the long term health of the organisation but see how any potential solutions can grow in lockstep with your business.

- **One supplier** - One of the biggest tests of buying into a new solution tends to come down the line. How a supplier deals with support issues is a huge reflection on the strength of the relationship between them and the customer and any organisation will be keen to avoid support headaches. For this reason, many businesses look for a single supplier to provide a comprehensive suite of people management solutions as it offers a clear contact point if errors occur.

- **Time saving and other efficiencies** - Although the specific challenges outdated solutions present to HR may not be as apparent to personas within different disciplines, all exec level talent will innately understand the benefits that increased efficiencies and time saving will bring to the organisation and how freeing key personnel can empower them to leverage their talents in more meaningful ways.

As you can see, there's a huge number of factors to take into consideration when pitching a solution across the scope of your organisation. Ultimately, the key to success will be demonstrating that you have taken this concerns on board and are able to accurately show how investing in new systems and technologies can help not overcome challenges but foster wider business growth.

One of the most universal approaches to take will be asking key questions of suppliers, particularly around:

- Ongoing support

- Training

- Scalability

- Does the supplier have an ongoing product roadmap you will be able to benefit from?

You will find that approaching the board with the answers to these questions in place, you are more effectively equipped to communicate the benefits of a new solution in a language which is universally understood by all members of the C-suite, regardless of their respective disciplines.

Crunch time

So, it's crunch time. You understand the need for a new solution, and have started to think about who you need to convince and what their vested interests are. But when it comes to actually getting your colleagues on board, what do you need to consider?

Present for sign-off, not consideration

It's unlikely that anyone in the room will be more of an HR expert than you. They may have an opinion, but you should position yourself as the subject matter expert. And this should be clear from your presentation: now is not the time to present multiple options. Doing so is only likely to slow down any decision-making process, and make your audience wonder why they're there. Instead, underline that you have already completed thorough research, done your due diligence and are presenting the best solution for the company.

Pick your moment

Whether presenting to the board, or to an individual senior director, timing is everything. If they are in the midst of preparing for AGMs and End of Year reports, the chances are you'll struggle to even get in front of them.

Know your board calendar and the wider business year, so you can pick a time where (if such a thing exists) business is quieter and you're likely to be given a fairer and unrushed hearing. Better yet, time it when you know a certain topic's being discussed which will directly be improved by investment in new technology.

Tell your story

As important as it is to be pitching with the key considerations of C-suite stakeholders in mind, our advice is to still use your own experience as a narrative framework as a way to shape your presentation. Talk about specific challenges you, your team and your people may have been experiencing as a result of outdated solutions and how you believe investment can help you overcome them. Make it clear to the C-suite that you understand that all of these challenges are interconnected and that by dealing with inefficiencies even at the most entry level point of an organisation, you create greater long term health at the macro level.

Follow up individually

Once the presentation has happened, it's worthwhile touching base with each key stakeholder individually. Time constraints with presentations may mean that specific concerns don't have the room to be voiced at the time. Getting in touch with personas on an individual basis allows them to voice any misgivings and offers you an opportunity to demonstrate how you have taken these issues into consideration.

How to keep momentum

Clearly your presentation to the C-suite will be one of the more crucial elements in determining the make or break nature of your goals of digital transformation. Even after this step, We still believe that there's a number of considerations which carry equal weight and run the risk of derailing any potential projects before they get off the ground.

Whether it's before or after your key presentation, what are the factors you should focus on in order to ensure that momentum and enthusiasm for a project is maintained until a sign off point?

Answer outstanding queries

Before sitting down with the board, you may find that questions have been raised about the viability of the potential project. Ensure you are engaging with the interested parties and directly answering these outstanding queries. Not only does this allow you to hit the ground running once you get the go ahead but during the pitch, you may find that having covered key concerns, you may have won over certain personas in way which pitching blind wouldn't have achieved.

Build your project team and agree responsibilities

Even before you make your pitch to the C-suite, it pays to have a realistic project plan in place. Most importantly, ensure the project has an overarching Project Manager. This may be yourself, a member of the IT team or potentially a role your chosen vendor can fulfil. Whoever it is, it's essential that someone has overall responsibility to keep everything and everyone on track.

Keep communication channels open

Software projects often come unstuck due to a lack of communication and momentum. While the Project Manager will play a significant role here, it's vitally important that the project team are in ongoing dialogue. Whether that's through formal meetings or using platforms such as Slack, or Microsoft Teams, encouraging regular communication will reduce the number of unexpected obstacles and help to hold everyone accountable to shared deadlines.

It's also easy to forget the broader picture when you have your head down during the implementation phase. While you won't want to share every detail of the project externally, communicating project progress back to your senior sponsors in the C-Suite is a great way of ensuring their continued support (it's also always helpful to be able to leverage a senior director to get over roadblocks). By the same token, engaging with Internal Comms to start building interest to the wider workforce, who will eventually be using the platform, will make the adoption process much easier.

Set out realistic timeframes

As important as it may be to get a new solution in place, rushing or bungling the implementation stage will only erode confidence in a project and hinder your chances for future investment. In order to ensure a smooth sourcing process, set out what you believe to be a realistic timeframe for sourcing and implementation. Present it to the board and if timeframes exceed their expectations, be sure you are able to articulate the reasons why.

Make it clear that the focus is on taking your time to find the right solution the first time and by investing time at this stage, you save on the need to park or cancel projects.

Remember,
you're not on your own

At OneAdvanced, we put people first in everything we do and this is no more evident than in our range of people management solutions. We believe in the power of systems and technology to help workplaces and teams and to allow people to achieve the full scope of their roles and we have over 40 years of experience to back that up. Our commitment is to always innovate and invest in our solutions, ensuring that our offerings always evolve to meet the changing needs of our customers and the marketplaces which they operate in.

We believe in the power of technology to create positive change. We feel that the systems and technology which organisations rely on day to day can be leveraged to achieve so much more than just operational efficiency. We believe that technology holds the key for businesses to begin creating a culture which puts the engagement and wellbeing of their people at the forefront.

Here at OneAdvanced, we've helped customers from businesses of all sizes secure the internal support they've needed to implement transformative software across HR and many other business departments. We know that for many organisations, implementing a project of this size isn't an everyday occurrence and the stakes, from both a personal and business perspective, can be high. Our team can help you to build the business case, overcome common objections and manage implementation and onboarding so you're assured of the best possible project outcome.

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We would love to hear from you

If you'd like to find out more about how OneAdvanced's people management solutions can help you achieve excellence, get in touch with our team today.

Get in touch

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