

Deliver Winning Proposals by Speaking the CEO's Language

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For CEOs and CFOs, approving large tech expenditures can involve a leap of faith.

As an IT professional, your challenge is to remove ambiguities and clarify the decision that they face. By translating your technology recommendation into a way for your company to achieve its goals, you can build rapport and forge strong connections with your CEO and CFO.

Begin by viewing the organization through the eyes of senior management rather than through the narrow lens of a technologist. This enables you to speak your bosses' language and present a solid business case for investing in a particular tech tool.

Here are some techniques to sharpen your persuasive power as an IT manager:

Frame the issue. Preface your remarks to the CEO and CFO by defining the issue in terms that top executives readily understand. For example, begin by stating the organizational imperative that the CEO has repeatedly articulated ("We need to cut costs 20%," "Our objective is to expand market share by 25% this year," "We must boost customer retention and cross-selling."). Then tie your proposal to the CEO's directive while highlighting an opportunity to harness technology to achieve corporate goals in less time or for less money.

Think in threes. Package your ideas in threes. Give a trio of compelling reasons why your bosses should approve your proposal. In one attention-grabbing sentence, provide a succinct overview of your three points. (Example: "This new software will allow us to track transactions in real time, reduce our error rate and produce a new and more substantive set of metrics to measure employee performance.")

From that point, you can elaborate on each of the points with examples, evidence, statistics and other supporting data. Caution: It's important to choose three specific points that appeal to the CEO and CFO—not the three best technical features from your perspective as an IT expert.

Cut the tech lingo. Before presenting your recommendation to senior management, rehearse to make sure that you speak in basic or non-technical terms. Practice by delivering your presentation to a non-techie peer or a trusted mentor or business coach. Attentive peers or outsiders can warn you about parroting a vendor's technical terms or citing references that laypeople might not grasp.

Let questions drive the presentation. Because of their vast knowledge and enthusiasm, some IT managers oversell their proposals. They may spend 20 minutes regaling the CEO on the benefits of enterprise software or the latest cutting-edge features of a new digital gadget, offering detailed demonstrations to showcase what the technology can do. There's just one problem: the CEO may not care. Top executives usually prefer to ask questions that drive the dialogue with their IT manager. Instead of sitting through long presentations, they want instant answers to their concerns. Knowing this, you should share enticing bits of concise information while pausing frequently for questions.

Offer options. Senior executives like a menu of choices when analyzing tech expenditures. If they feel boxed into a corner or pressured to approve an all-or-nothing technology application under a tight timeframe, they may reject it. By

Bill Sullivan,
president and CEO,
Agilent Technologies,
Santa Clara, California

“If you're not careful, you can get into this world of IT that becomes a bottomless pit of spending money. You can sink \$50 million into something and still not have tangible results. So I always ask IT managers two questions, “How does this fit into our company's strategic direction?” and “What's the payback in terms of customer experience and efficiency?”

We measure customer experience thoroughly and “dollarize” it, so everyone knows to come to me with answers from the customer's perspective and in terms of measurable efficiency gains.”

providing a range of options—with specific pros and cons for each—you increase your odds of triggering a favorable response from your CEO and CFO. For instance, you may want to suggest a relatively low-cost pilot phase as one of the choices on how to proceed. This may satisfy hesitant officials who want to test the technology before committing to spend a larger sum.

Align projections with historical trends. For many executives, the toughest part of assessing tech expenditures is looking ahead to calculate uncertain costs and benefits. Will the promised payback really accrue over time? What negative surprises can arise? Can the technology prove obsolete sooner rather than later? Anticipate and address such concerns by aligning the past with the future. Draw conclusions from your organization's experience purchasing other, similar technologies and use trend analysis to extrapolate results for the coming year. Because our brain tends to lead us to think that the near future will mirror the near past, most CEOs and CFOs respond more favorably when they can examine the recent past to predict future outcomes.

Bruce Mosler,
president and CEO,
Cushman & Wakefield, New York

“My CTO knows to tell me how something benefits my people and my clients up-front. He also needs to give me a realistic time frame and a realistic cost. I don't want my CTO to come back to me later with, “Oops, I missed it by a wide margin.” And I want him to speak in clear, fundamental language.

Acknowledge skepticism. When you champion a new tech tool by indulging in unmitigated raves, it's like waving a red flag in front of a wary CEO or CFO. A better strategy is to approach any technology with a skeptic's eye. IT presenters who play devil's advocate and consider what can go wrong might sway fence-sitting executives to approve their request.

Provide a timetable to track results. Evangelizing too forcefully without giving senior officials a sense of when they can expect results will lead you to hear “no” more than “yes” to your proposals. Exuberance for a new technology does not trump calm, clear-headed planning. Savvy IT experts thus present a timeframe for measuring the incremental investment in a tech-related product or service. Setting up checkpoints for, say, 60 and 120 days after purchasing software can reassure the CEO that any long-term expenditure is contingent on concrete results in the short term. Above all, strive to learn something from every presentation. Most CEOs have a preferred way of digesting information from their IT staff (see three examples in sidebars). By seeking feedback from their bosses on their performance, IT professionals can commit to constant improvement as dynamic, persuasive communicators. ■

He knows that he'll lose me unless he gets to the benefits right away along with the costs. Once he covers that, he knows I want to hear an overview of what it's capable of doing.

What I don't want to hear is why he's so excited—all the bells and whistles that mean a lot to him. If he starts off giving me a detailed comparison of systems, I'll tune out. ”

Reese Schonfeld,
former president and CEO,
Cable News Network (CNN),
and former president,
The Food Network, New York

“At The Food Network, IT issues came up a lot. There's always a new toy and gimmick that will do more than what you want. You can end up over-spending and not getting what you want unless you get the IT people to listen to you from the start. **Get them to go after the most apt solution to what you want to stay on mission.**”

I've found a good way to do that is to number the tasks or objectives that you want to accomplish from the technology. Then when the IT managers come back to you with their recommendations, make sure they follow your numbered list. If they don't, keep asking, “How does what you're saying achieve task No. 1 on my list?” ”