



HOW TO

**GAIN EXECUTIVE SPONSORSHIP
FOR NEW PROJECT
MANAGEMENT**

SOFTWARE



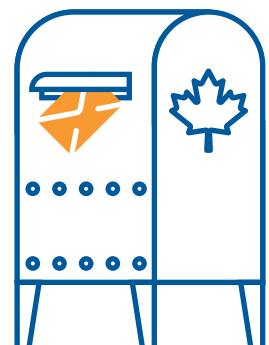
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She has been a marketing professional in both the B2C and B2B space for over 8 years. She enjoys helping Easy Projects clients prosper by providing them with content that will bring them immense value on their project management journeys.

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ELEMENTS

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Executive Sponsorship Template

Influencing Change

In a [study conducted in November 2010](#), it was found that people associate longevity with goodness. In other words, they favour old ways of doing things as superior to new ways. For example, in the study, people were more prone to try acupuncture when told that it had been around for 2000 years as opposed to 250 years. As they say, old is gold.

The idea of change is difficult for most people to embrace or pursue. As creatures of habit, [humans like things to be predictable, steady and uncomplicated](#). Since executives are human (most are!), they are not exempt from this observation. If the revenue has been flowing well and the numbers are heading in the right direction, why change?

You have the Power

That's where you come in. You need a project management system for your team but convincing executives to allocate a budget and make a change is no simple feat. In fact, [studies](#) show that executives often reject ideas coming from managers unless they see the idea to be something that will improve the overall performance of the organization. According to Harvard Business Review, the real problem lies in the simple fact that [many middle managers lack the know-how](#) in speaking the language of executives and presenting ideas that will be approved.

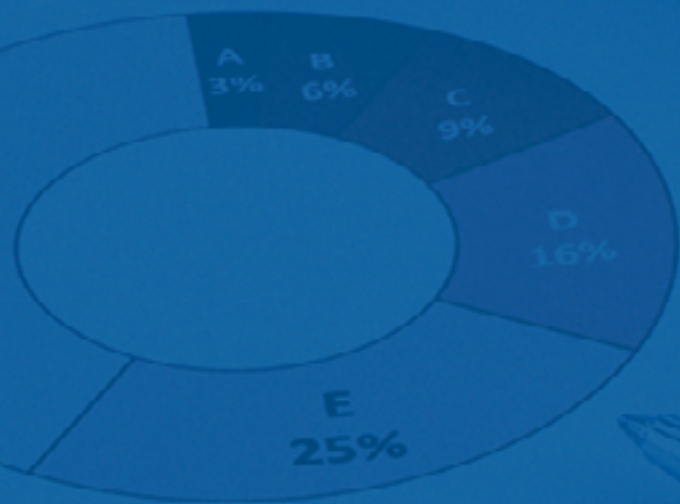
The good news is, you can fix that. When it comes to daily operations and who knows what's best for their respective division or team – it's you. You're the ideal person to provide insights to the executive team on what needs to be improved.

In the next few sections, we'll share some highly tactical approaches to equip you to successfully influence change within your organization.





STAGE I: BUSINESS ANALYSIS



Stakeholders

The first step to any change initiative is knowing who the key players are. In the case of purchasing and implementing new project management software, you want to consider the following four groups:

- **Project Managers**
- **Project Contributors**
- **Administrators**
- **Executives**

Speak with each of these groups in turn to better understand what they are looking for in a solution. Because user adoption is a major part of any change initiative, it's essential to get individual thoughts on how the current project management process/system is performing and what they would like to see improved. If your team is too large to have one-on-one meetings, you can always send out an email, survey, or speak to them in small groups.

A Note on Benefits

Thoroughly know and understand how each stakeholder group will benefit from the solution. This feedback and verification will help mitigate any risk of adoption reluctance down the road once the new software is approved. When introducing new systems quite often

people might not be clear on the benefits. In this case you'll need to do some research of how this solution has helped people in the same role in the similar companies. Lean on a vendor to help you build the case. People always want to know "What's in it for me?" so make sure to think about that for each group involved.

Data Collection

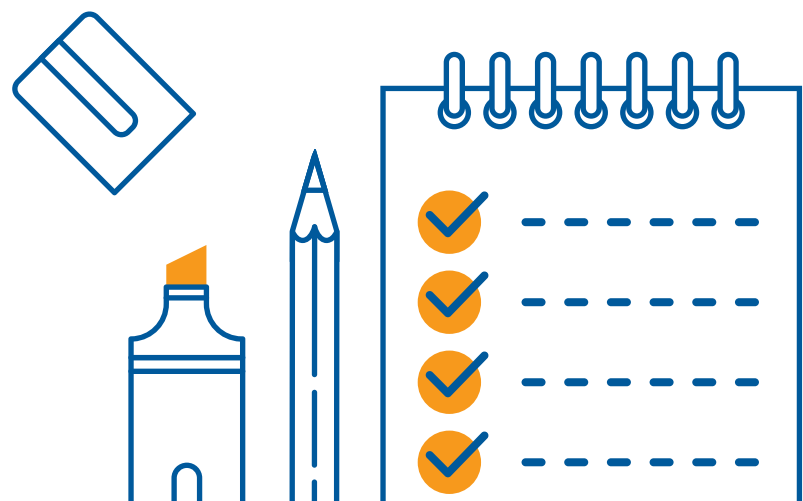
Now that you have some sentiment feedback from your team, it's time to gather hard data from your current project management process. You'll have to go back and create reports (perhaps manually if you don't have a good system) about project performance, what the cost implications to the organization are, and identifying where the current shortfalls exist. Executives love relevant numbers, so be especially thorough on this. Some examples of reports you could pull are:

- **Delayed projects**
- **Late projects**
- **Over Budget projects**
- **Overtaxed resources (people have way too much to do - thus they are doing overtime)**
- **Project bottlenecks**

Solution Selection

Once you know what your shortcomings are, you can begin to put together a short list of project management software solutions that help to address the problems you've identified and quantified. Figure out what the costs will be to implement, what the expected timelines are, and what the roll-out will look like on your end. Your executives may not want to hear all of the details of the solutions you're presenting, but it's important that you have them in-case they do. Topics that you may want to talk to potential vendors about include:

- **An outline of their sales and trial process**
- **An outline of the implementation process and associated costs**
- **Features & functionality (specifically adaptability to your desired workflows and habits)**
- **License costs**
- **Availability of Training**
- **Support options**



TIP: Gathering Feedback

When testing a tool for project management, work with your vendor on a structured method to solicit feedback from your various audience groups. Experienced vendors should have tools to help you gather and consolidate structured feedback from your users (more on this later).

For more on choosing solutions, please see our [Evaluation Guide](#).





STAGE II: FINDING THE RIGHT EXECUTIVE

Project teams come in many shapes and sizes.

Some operate in departmental silos, while others are large and are spread geographically across an entire organization. Knowing the type of team dynamic you have determines who you should approach for buy-in.

To add to the complexity, it's often true that one executive can't make decisions just on their own. They'll maybe need support from their peers, especially the CFO (unless you're going straight to the CEO). This is why it's important to pick someone who is influential and has some sway. In the next section, we'll dive into the attributes you need to pay close attention to.

Attributes of the perfect executive for your project

In an [exclusive report](#) published by the Project Management Institute, a study conducted by Helm and Remington (Helm & Remington 2005) concluded that there are nine main attributes to look for when choosing the right sponsor for any project:

- 1 **Appropriate seniority within the organization**
- 2 **Political knowledge of the organization and political savvy**
- 3 **Ability and willingness to make connections between projects**

- 4 **Courage and willingness to battle with others in the organization on behalf of the project**
- 5 **Ability to motivate the team and provide ad-hoc support when required**
- 6 **Willingness to partner with the project manager and project team**
- 7 **Excellent communication skills**
- 8 **Personal compatibility with other key players**
- 9 **Ability and willingness to provide objectivity and challenge the project**

There were also several secondary attributes that were mentioned by participants of the study, but the one that stands out is simply: **“having the passion to drive change”**. This is the fitting description of the kind of executive you want on your side as you try and secure funding or push a project forward.

The First Meeting

Once you figure out who you're going to approach, it's time to act. Reach out and book a time to meet with them for a preliminary discussion. During this initial call/meeting, ask about the top **three** criteria that will make it a success in their eyes. Be sure to document the conversation and send it as an email follow-up so you can have a clear and mutually agreed upon set of objectives required to approve the initiative.

TIP

You may also want to find out how they prefer to receive information.

Do they prefer a conversation?

A powerpoint presentation? A PDF? Knowing this information will help you get across to them faster.



STAGE III: RISK MITIGATION

Change Management

Asking for a new project management platform means that you need to be very good at managing change in order to ensure successful implementation and user adoption. Executives take their sponsorship of a decision seriously so make sure you have your ducks in a row. If you mess up somehow, it also falls to them to take some responsibility which may impact their reputation as a leader.

When presenting information to your prospective sponsor, lay out not only the plan for the tool selection and implementation, but also for the internal processes and oversight that will make sure the transition is smooth. **User adoption is important for executives**, so make sure you have a good idea on how you will be working with your chosen vendor and your team to ensure success. This is a good place to include information that you collected during your business analysis when you spoke to all of the affected stakeholders. It will show that you have taken a holistic approach to your analysis and increase your credibility.

Vendor Involvement: Expert Opinions

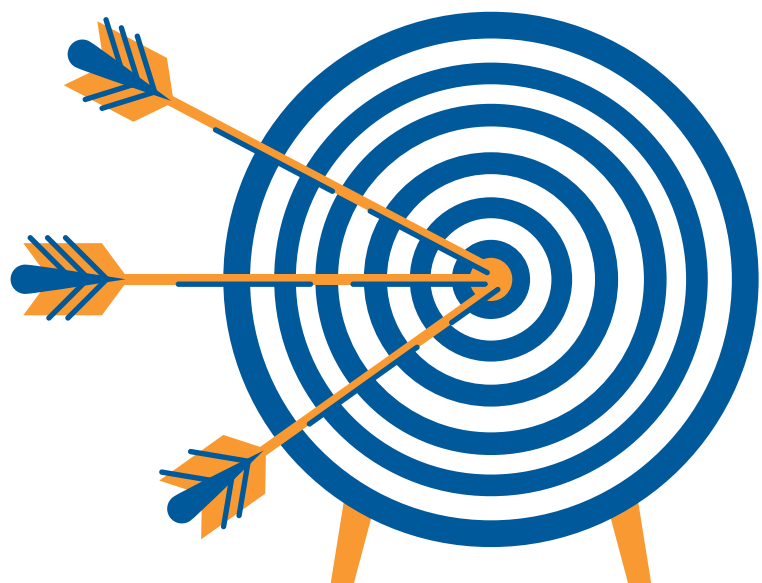
Take a look back at all of the research that you did when you were preparing for your presentation. By now, you should have an idea of which vendor you would like to work with to make your vision a reality.

When you make your final choice, choose a vendor that will partner

with you during your executive presentations. This is important because it gives you extra credibility. Your vendor should also be able to answer technical questions better than you can, so collaborate with them and increase the chance of having your initiative approved.

TIP: Require Executive Presence from the Vendor

If you're going to enlist the help of a third-party, don't involve the sales person that you've been dealing with. Instead, request the presence of their Director or even VP of Sales. In our experience, this works really well as it helps most executives achieve mutual understanding and strategic alignment.





STAGE IV: DELIVERING THE PERFECT PITCH

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Now that you've lined up who you're approaching, and have all of your information ready, it's time to prepare the pitch.

Knowing your audience is the first step toward building a great business case. What we know for sure about senior executives is that they are impatient and can some times make several high-impact decisions everyday. That's why it's important to make your pitch short, sweet, and compelling..

It's important that before you begin your presentation to set the agenda and to let them know that you will spend the first five minutes presenting and the rest on discussion/questions. This helps set the expectations and reduce any potential interruptions. Once the important details are out of the way, they will have plenty of time to ask questions and dig deeper into the proposal details.

Regardless of how much time you have to present, summarize the key elements of your presentation **within the first five minutes.**



The structure to follow during the five minute pitch is:

1 High level overview of the problem

(ie, why we NEED a project management platform)

Answer questions such as:

- What is the problem(s)?
- How do you know (evidence)?
- What impact is it having on the organization as a whole?

2 The solution to the problem

- How do you plan to solve the problem(s)?
- Who will be involved?
- What are your recommendations based on your research?
- What results does the company expect to gain?
- What are the risks/costs of taking no action?
- What is the expected return on investment (ROI)?

3 What is “The Ask”?

- What specifically do you need from your executive sponsor?
When?
- How do they want to be involved?
- What are the next steps?

TIP: Use language executives like to hear



When making a presentation to executives or writing a business case proposal, use words that focus on the bottom line. Be specific in your numbers by making statements and conclusions based on actual facts pulled from your business analysis.

Here are some examples of what you could say to perk their interest and keep their attention:

- “Improve our customer satisfaction” by 20% in three months
- “Decrease our operating expenses” by 15% within one month
- “Increase our revenue” x 50% by 6 months
- “Beat the competition or at least keep pace” (explain how)
- “Shorten our time to market” by 3 months
- “Improve employee performance” by 30% in 4 months
- Improve employee satisfaction by 20% in 12 months
- “Reduce turn-over” by 60% in one year due to less stress and improved job satisfaction

www.brandonhall.com,
[Learning C-Speak - The Language of Executives](#)

Presentation Tips: The visuals

Slides are a great way to keep your audience engaged but moreover, to act as a sales tool. Whether your executive wants a powerpoint presentation or not, it's best to put one together in case they need something to show the rest of the executive team. Powerpoints are also a useful asset when you get into the discussion section. Put **all** of the information you've gathered into slides. Place your executive summary at the beginning so you can refer to it easily. If you want to know more about putting together a decent powerpoint presentation and how to do it [watch this video](#).

Presentation Tips: Practice

No matter how much of an expert you think you are at presenting, it's always a good idea to practice. Remember, you're aiming for **five minutes** to effectively communicate what you need to. Don't be afraid to have a colleague help you out with this. Have a timer ready to make sure that you can squeeze in all the information into a 5 minute time slot.

STAGE IV: DELIVERING THE PERFECT PITCH

Presentation Tips: The visuals

It's go time. Once everything is in order and you feel prepared, it's time to finally present. Don't get nervous – you're fighting for a good cause. If you happen to get shut down or rejected, chances are, you picked the wrong person to work with. Don't give up after one try. Try talking to other executives and one of them is sure to see the appeal of implementing a new project management platform (or whatever your project is) for the organization and help champion your cause.





SUMMARY

Gaining executive sponsorship for any project is not a simple task. It requires a dash of bravery and a passion for solving problems on behalf of your team or organization.

Steps to securing executive sponsorship:

1. Know the problem to be solved
2. Do all the primary and secondary research you can to build your business case
3. Choose the right executive for your cause
4. Prepare the perfect five minute pitch
5. Build visuals and practice
6. Deliver your presentation
7. Rejected? Go back to step 3 and try again

EXECUTIVE SPONSORSHIP TEMPLATE

Click [here](#) to download Executive Sponsorship Template.

We hope that you found this to be useful. If you have any questions, please reach out to your product specialist who will be happy to assist you in building a business case.





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