

Selling Cloud HR to the C-Suite

Our guide to securing senior
buy-in for your next HR
software project



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So, you've done your research, watched the demos, and met with all the vendors. You've consulted your team and know exactly the right platform that's going to transform the HR department's impact on the business. Now you've just got to convince the people 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 by the C-Suite, and that you get the backing you need to move the project forwards?

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 ink on the contract.

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Make sure your house is in order

Unfair as it may be, 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 won't have time to tell your whole story in your 10-minute slot. Be proactive in communicating any recent HR successes in the days and weeks building up to the board:

- ▲ 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.

Ensure any departmental differences, or outstanding HR issues, are rectified

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.



“ 25 per cent of businesses
lack HR representation in
the boardroom. ”

peoplemanagement.co.uk, June 2019

Understand the wider business goals and how HR contributes


When HR doesn't have a place 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 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 need to ensure they understand the strategic direction of the business, opportunities and threats, the competitive environment and other external factors affecting its success. They will then be able to make the best possible case for investment in the team, and the appropriate HR technology stack to support it. HR needs to demonstrate its ability to map the functions of HR to that strategic conversation and develop a reputation as knowledgeable advisors who inform broader decision making.

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.





“ The rise of 21st-century HR has given birth to a new breed of HR executive, with a much broader skill set, who is leading the transformation of what’s possible in the field and reinventing HR as a data-driven strategic function critical to an organisation’s success. ”

Fast Company - The best HR is invisible

Make your presentation board-ready

If you're going to win over your senior audience, you'll need to have a flawless presentation, backed by detailed prep. You'll be presenting to people who have collectively seen and delivered hundreds of pitches, so, while they will forgive a few nerves, they will be relentless in picking out any failings. Think Dragon's Den, without Evan Davis.

Whether you intend to use PowerPoint, or speaking to a more detailed proposal, it goes without saying that spelling, branding and formatting should be 100 per cent correct. At best, any error here will be an unnecessary distraction, at worst it will cast you and your team in a poor light.

Be respectful of time

Whether you're presenting to a board who have flown in from different regions or you're anticipating a one-on-one with your CEO, it's highly likely you'll be just one item on a long agenda. It's equally likely you won't be item number one. Where possible, talk to the board Chair to ensure your item is not the one that gets bumped due to over-runs, and when your moment arrives, make every minute count.

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. That solution should then be given in as few slides as possible.

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. At worst, if you push for a meeting at the wrong time, you'll look out of touch with business priorities and damage your reputation, so choose your moment wisely.

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 fair hearing. Better yet, time it when you know a certain topic's being discussed which will directly be improved by your new Cloud HR platform. For example, the business may have been on the acquisition trail and need to integrate teams, or have a number of post-Brexit plans that depend on HR strategy.



“ Well-presented data can do wonders for persuading an audience. But overwhelming slides with needless detail or trotting out tired visuals will also quickly lose you favour. ”

HBR.org, July 2014 - The right way to present your business case

Know your audience

Not all board members are the same, and not all will have the same reasons for being in the room. Some are likely to carry more weight around the table than others, while some will have specific remits which make gaining their buy-in more important, such as heading up a remuneration committee. To get the best possible response from your presentation, make sure in advance that the people you need to win over will be in the room. And to do that, you may need to turn detective...

Get to know your board

If your audience are Executive Directors, you are likely to know at least some of them already – if that's so, you may be able to warm them up in advance, by giving them a preview into your pitch. You may even get some early insights into any questions or unease they have, before you enter the meeting room.

If you're not on those terms, talk to their teams and find out what makes them tick and what their interests and challenges are. As a starting point, consider the job titles and responsibilities of the people you're presenting to, and ensure you've thought about the direction their questions are likely to take.

If you'll be presenting to non-execs, your task may be a little harder, as these people are rarely accessible directly. Instead, talk to people who've presented to them before or, if that's not an option, view their profiles on LinkedIn – you may find they've been on a board at an organisation which has implemented a similar system, or have a hitherto undeclared interest in HR systems, which will make your job that much easier.

Don't be phased by 'stature'. It's easy to walk into a board meeting and feel like the underdog. Your audience are likely to have incredible business track records, but first and foremost they are colleagues with a shared interest: to improve the performance of the business. Remember that you are likely to be the expert in the room on this subject, and you're there to fix a problem for them.

Some of the personas you may come across include:

The technical expert

Although likely to be the CIO or CTO, the technical expert could be anyone who's an engineer at heart. They will want to understand the impact of any new system on IT – whether that's in terms of human resource to support implementation and ongoing maintenance, integration with other systems, or the impact on infrastructure. It's best to engage with them – or at least their team early in the process to ensure all technical challenges are well considered.

The financial decision maker

Your CFO or Finance Director is likely to focus on the cost of your HR platform. Any 'new' investment is likely to be subject to particular scrutiny, so you'll need to prove that investing in a new platform and replacing the old, will result in financial benefit in the long-term. Understand the ROI and time-to-value that you can expect from your solution and ensure this is communicated clearly. Also consider what could happen if you don't invest – what are the financial implications for the business if you don't update your systems now?


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.

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, he's 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.



“ It is important to remember that when you are presenting to executives, it is not enough to present data and analysis in a synthesised manner, but also to reduce the cognitive overhead the executive has to bear, by providing a clear perspective on the answer. ”

Forbes - The key to presenting to senior executives

Know your facts

We've established that your audience is driven and time poor. We also know that in order to achieve what you set out for – sign off for your Cloud HR platform – you need to be an undisputed expert in the area. Expect to be grilled!

Be confident about how your chosen platform is better than others - why shouldn't you just go for the cheaper option? Verbalise why it's needed – and the risks to the business if it's not implemented. Explain your key points clearly and succinctly, and leave nothing unsaid.

Know your numbers

Costs: Up-front costs, ongoing subscriptions, per-user licensing fees, support - these should all be numbers that you have to hand.

Results: Be clear about what the results of implementation will be for the business. How will results be measured and how long will it take for them to be realised? Commit to targets that are ambitious but achievable: Think staff turnover and associated costs can be reduced by 10 per cent? State it. If you have evidence of other businesses delivering on results, reference them. If you don't, find some. The board will be more receptive to hard data than blue sky thinking.

Dependencies, pinch points and contingencies

Understand and communicate the implementation process and timescales. The chances are that you'll need to engage various teams across the business to first implement the software and then ensure its adoption across the business. That's likely to lean on IT, Internal Comms, Payroll, HR (of course) and departmental heads - you'll need to know how much dependency your project has on each and have a plan for their involvement.

Don't present cold

Once you've secured your slot, make sure you're ready well in advance. If you're presenting to the board, be mindful that papers are circulated several days before the meeting so members can read up on any agenda items in advance. This can work to your advantage as you'll be able to cut through the preamble and get right to the point. If presenting to individual directors, the same principle holds true. Not only is it courteous to circulate your presentation in advance, it works in your favour, keeping distractions and needless questions to a minimum and focusing everybody on the subject at hand.



“ Executives want to get the information they need in as little time as possible. As you conceive, visualise, and present your message, your job is to convey that information as quickly, clearly and flexibly as possible... ..when an executive knows that you're well prepared and value their time, you greatly increase your chances of presenting your ideas again. ”

Nancy Duarte - TED speaker & presentation expert

You've presented successfully – now what?

So, your presentation went well. With luck, you'll have at least verbal agreement to progress the project. But now is not the time to sit back. What you do next could make or break the success of the project.

Close off any outstanding queries

Follow up immediately on any actions or requests for information that arose during the meeting, and ensure any remaining uncertainties are dealt with. The longer they linger the more chance your project has of stalling.

Build your project team and agree responsibilities

Ideally, you'll already have engaged with IT, Internal Comms and other departments prior to this stage, but now the project is underway, it's time to arrange a kick-off meeting to agree roles and responsibilities and set a realistic project plan. 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.



Learn from the experts

Quotes from HR experts who've been there and done it

Do some interdepartmental reconnaissance

“ In my case, I made a point of talking to the other teams likely to be involved in the project before I presented to anyone. That way, I was aware of the other projects I would be competing with for resources, could understand and work through any push-backs, and could adapt the language of my presentation to ensure any 'HR speak' was replaced with the kind of language that reflected the Finance and IT backgrounds of the senior team. ”

Maintaining senior sponsorship

“ Having senior-level sponsorship was a must-have. While I rarely had to call on the senior team for direct intervention, knowing that the project was supported and monitored from the top meant the entire project team were more accountable and gave us more leverage when competing for resources. ”

Building cross-functional connections

“ I think the most important decision I made was to find allies in other teams. Building these alliances really helped smooth the way for the implementation of the broader project, and often offered useful insights I wouldn't have come up with alone. ”

Remember, you're not on your own

Here at Advanced, 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.

To talk to an expert about how we can help you deliver HR transformation for your organisation, contact us on 03301 229 458. Alternatively, drop us an email at CloudHR@oneadvanced.com and we will be in touch shortly.



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