

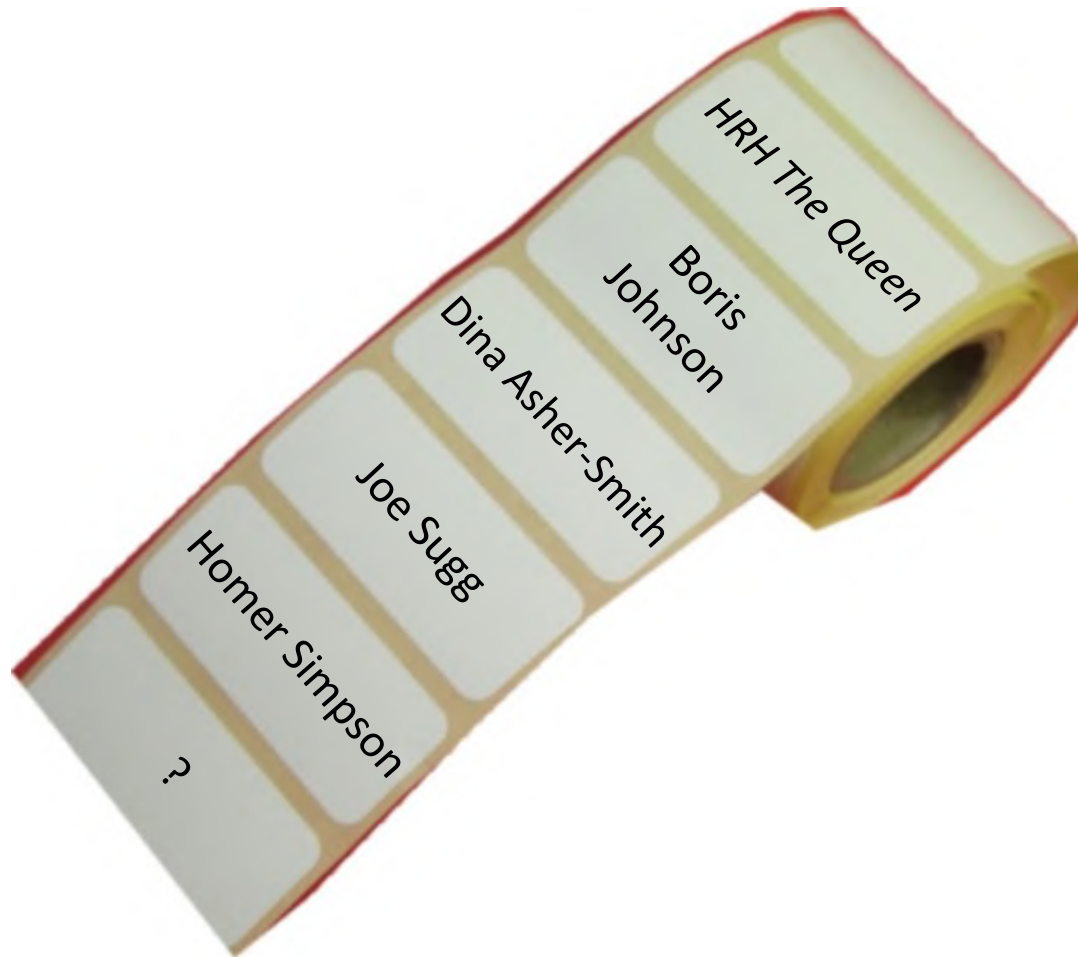


Creating Compelling Business Cases

Gary Argent

HELOA National Conference, Friday 17th January 2020

Who am I?





When you present a business case...

Create rapport

Create the right conditions for

Speak the same language

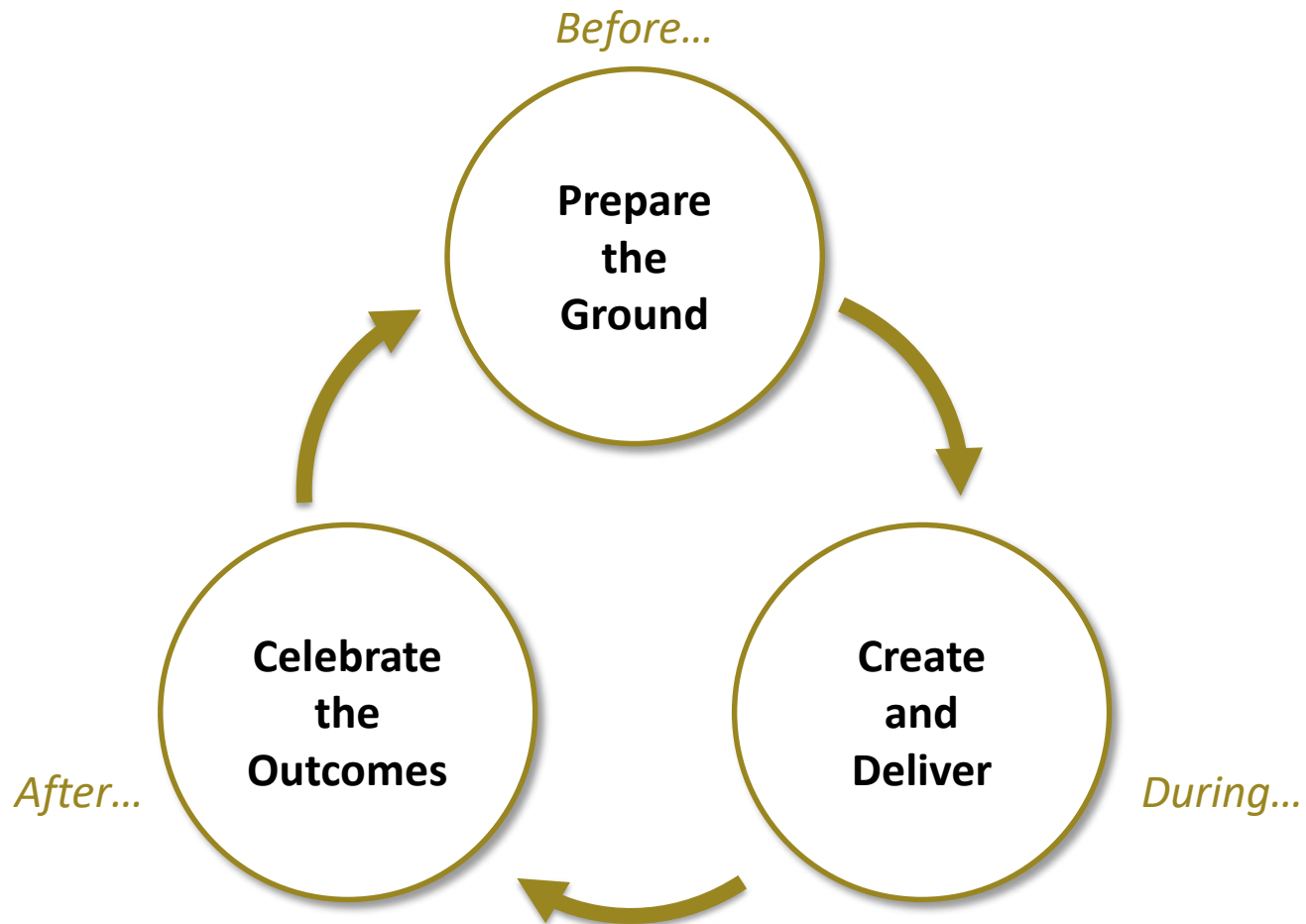
Good Information Exchange

Understand what motivates each other

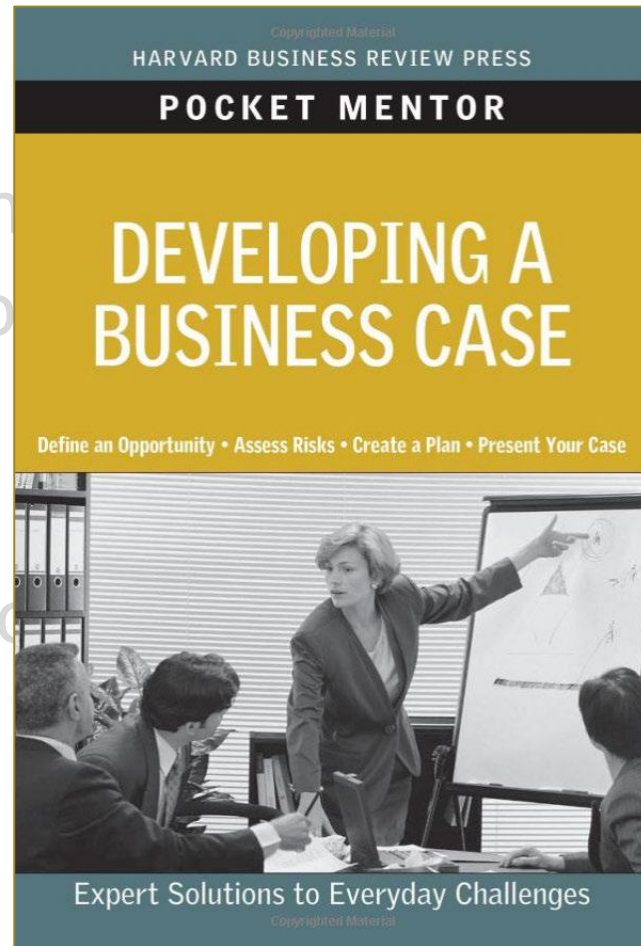
Introduction

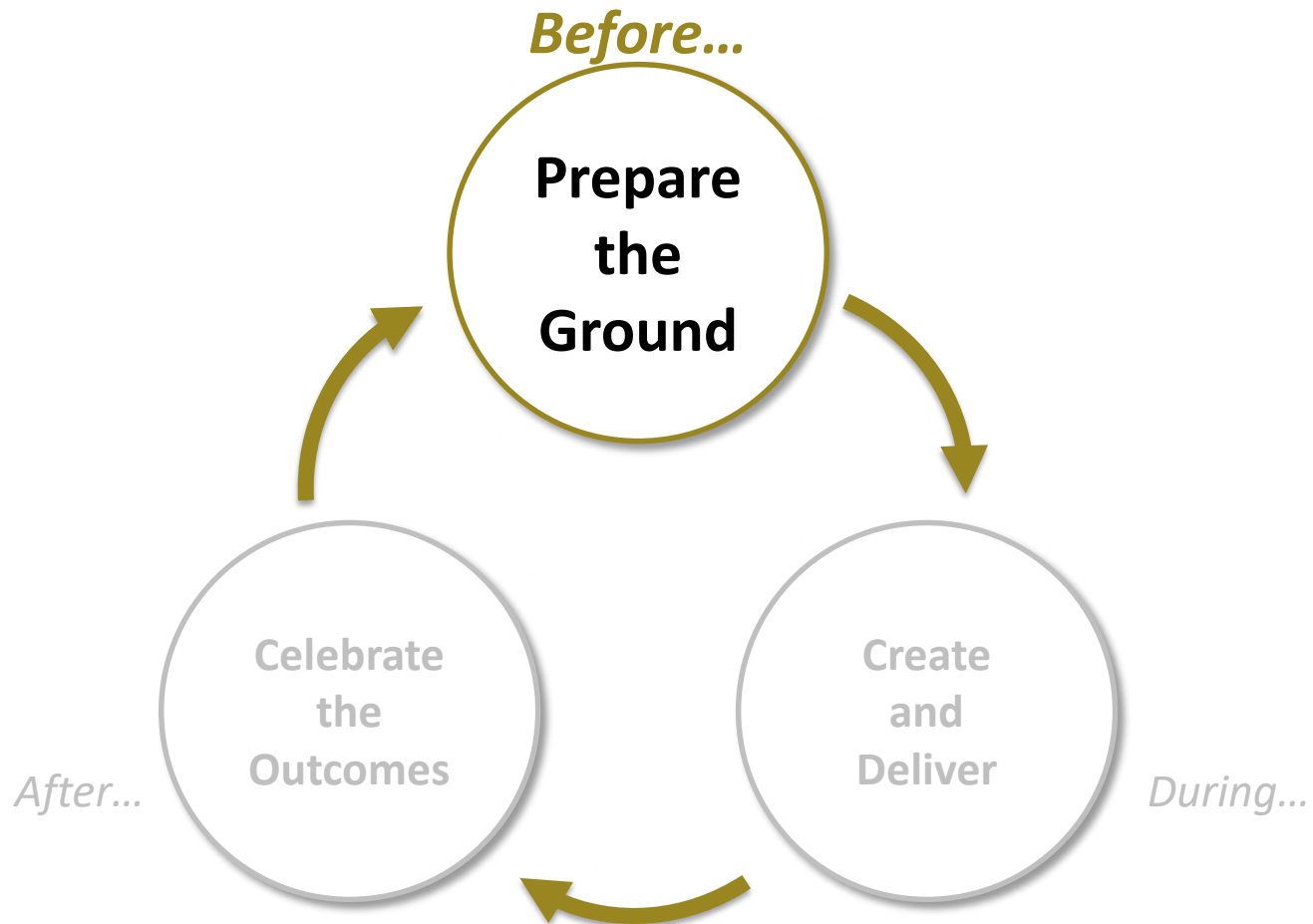


Aims for this morning



What do we mean by a “business case”?





Prepare the ground



Understand the landscape



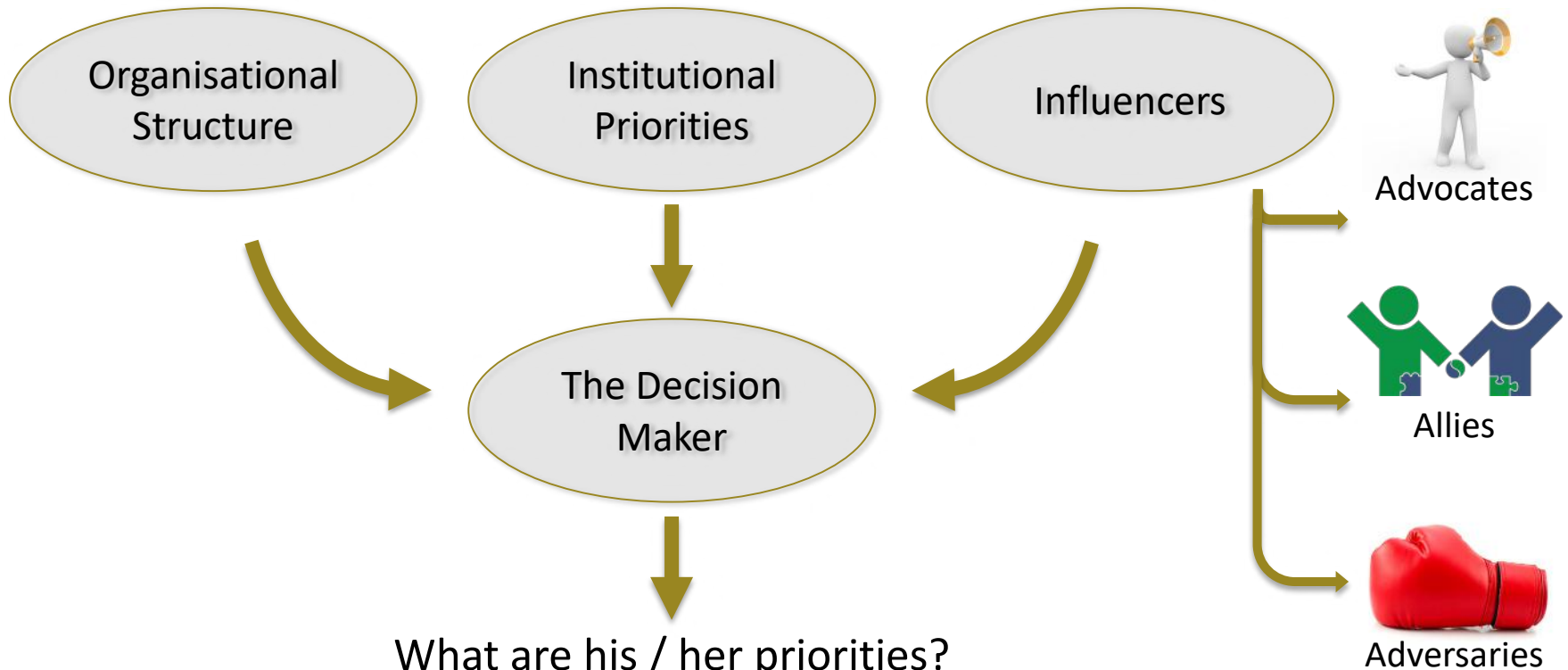
Brainstorm possible solutions



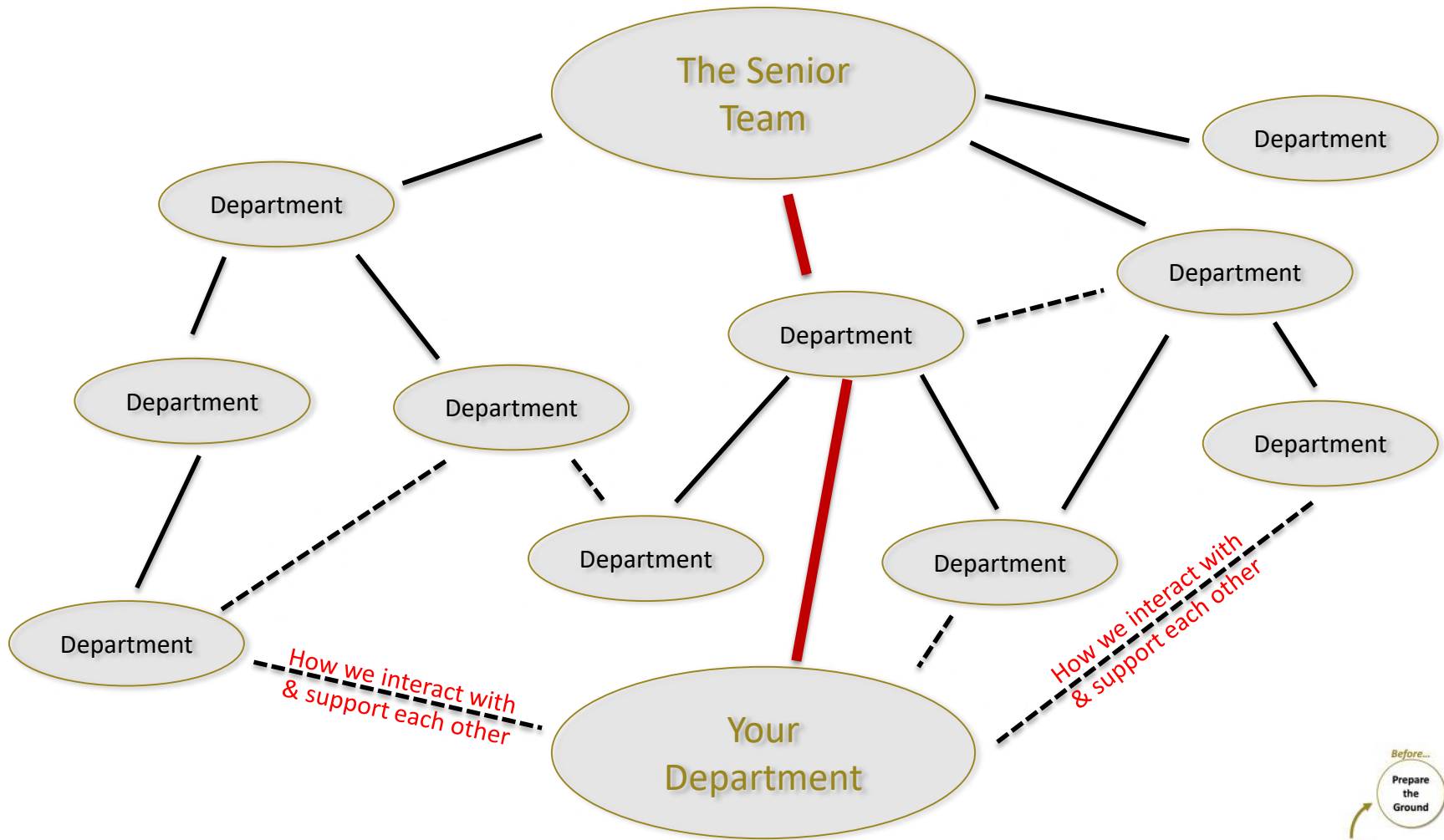
Maximise visibility and
cultivate alliances



Understand the landscape



Mapping the landscape



Who are your stakeholders?

Stakeholder	What are their drivers and challenges?	How do they view your service now?	Does that perception need to change?	How do they define success?
Senior management	New Strategy, comparator list, the REF	Reactive, small, good employer links, isolated, invisible	"A place to get your cv checked", breadth of careers activities	Sunday Times GUG, QS Global Rankings, DLHE, NSS
Students	Get a job, service on demand, high profile employers on campus	"I can't get an appointment", "I just need to get a 2:1"	Peaks and troughs, a degree is not enough, value of extracurricular	Getting appointments, meeting employers, getting a job



Who is your decision maker?

The Decision
Maker

Who is this for your business case?

What are their priorities?

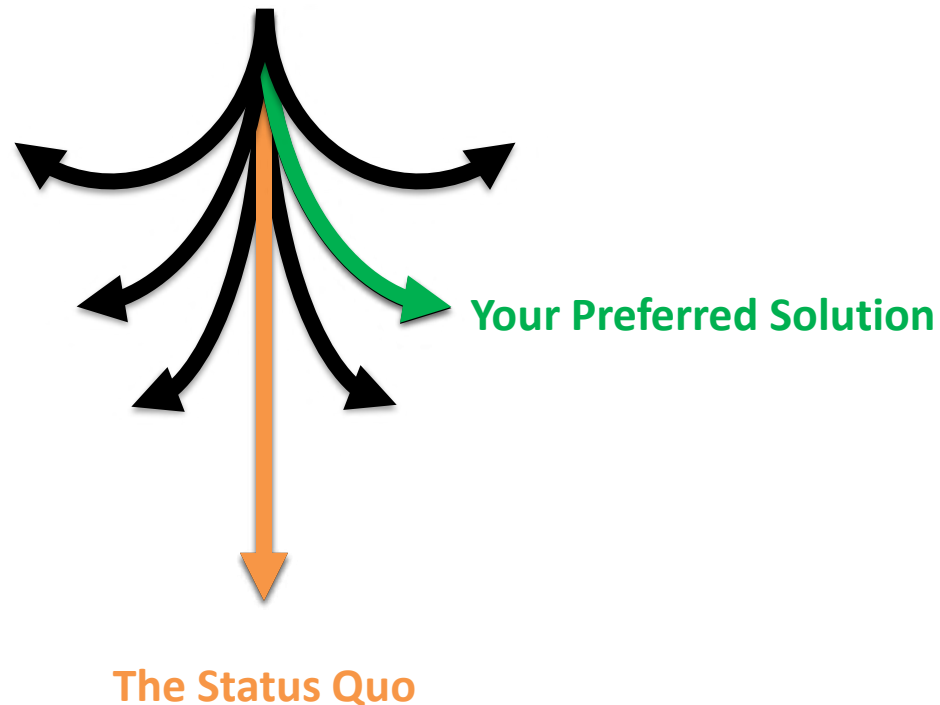
Who do they listen to?

What is their perception of your department?



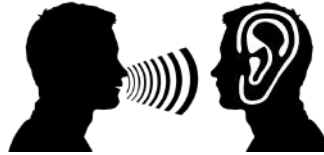
Brainstorm possible solutions

START WITH A **CLEAR PROBLEM STATEMENT**
AND **WELL DEFINED OBJECTIVES**



Maximise visibility, cultivate alliances

- How are you perceived?



- How is your department perceived?



- Who are your supporters?



The Power of the Elevator Pitch

What is your goal?

Describe your compelling vision of the future

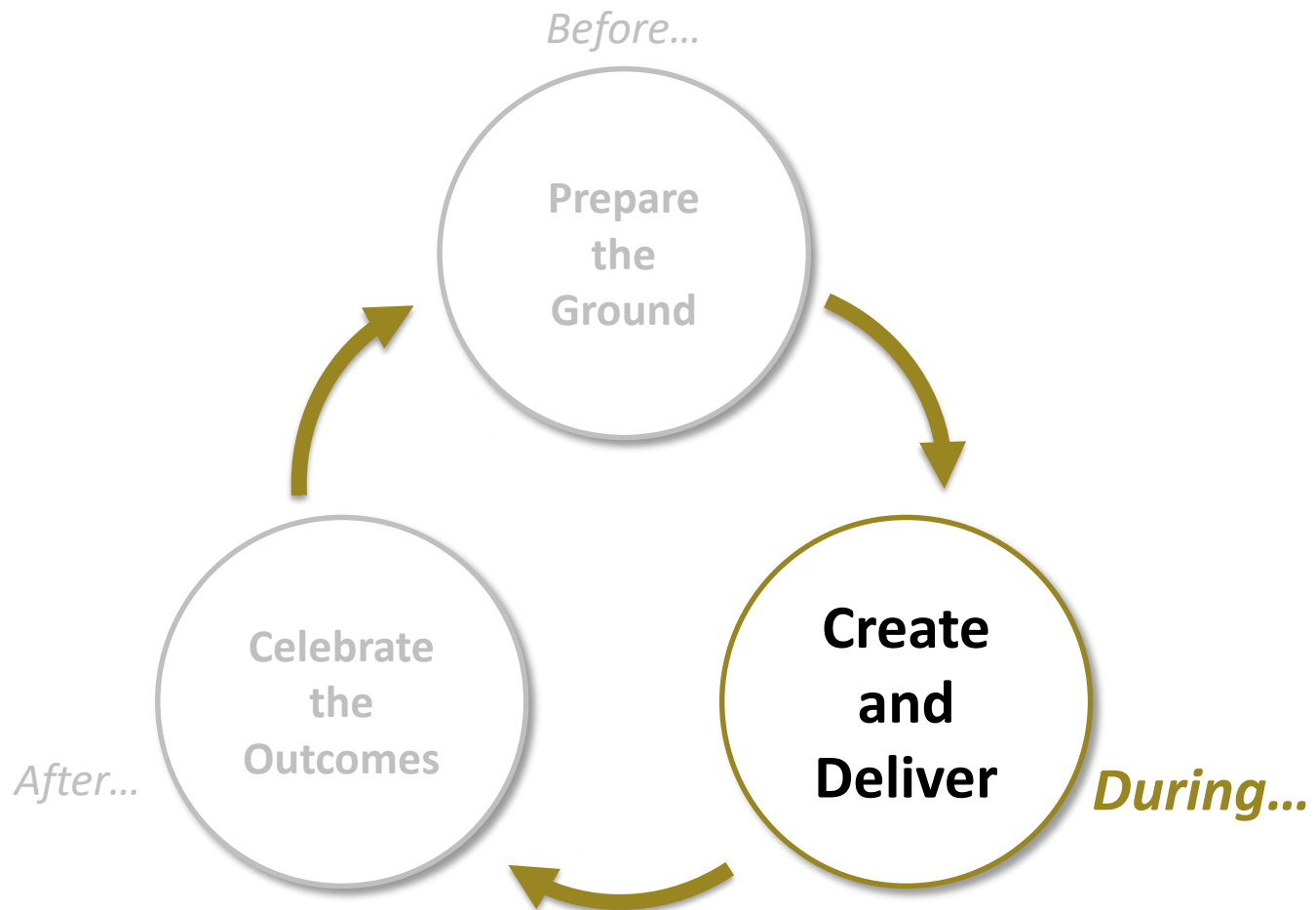
Explain why your department is well placed

Finish with a call to action

Practice!

(and get your team to practice too)





Create and Deliver the Business Case



Create the business case



Tailor your communication style



Deliver the pitch



Create the business case

- Explain the opportunity and present the alternatives
- Highlight and justify your preferred solution:
 - Compelling picture of the future
 - Benchmarking against comparators / competitors
- Present plan of next steps including:
 - Costs, returns and risks
 - Timescales and milestones
 - Responsibilities, resources and dependencies



Benchmarking

Criteria	Our institution (pre-investment)	Our institution (post-investment)	Comparator 1	Comparator 2
1...				
2...				
3...				
4...				

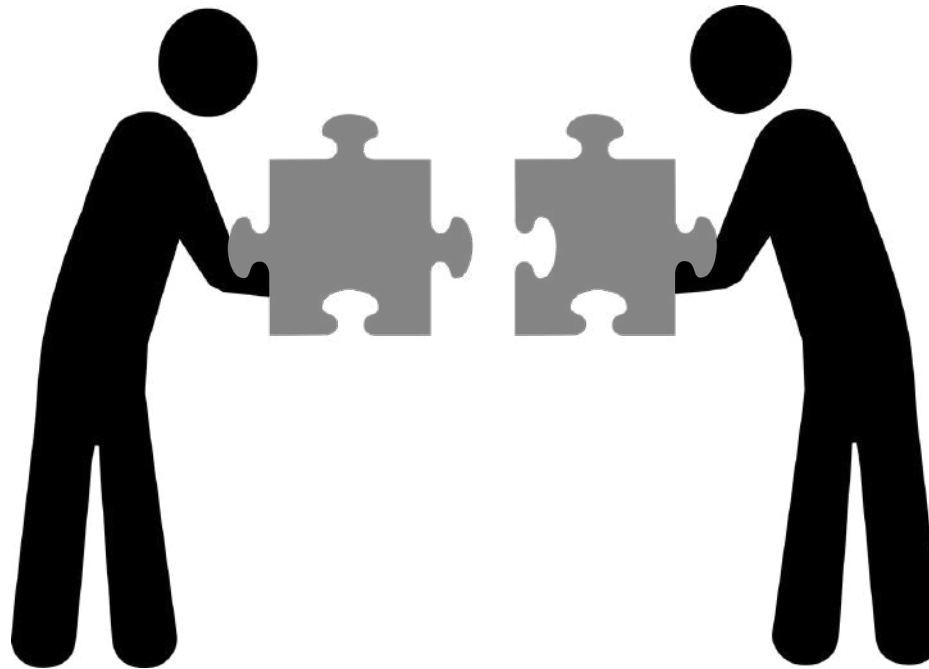


Create the business case

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Who else does your success depend on?

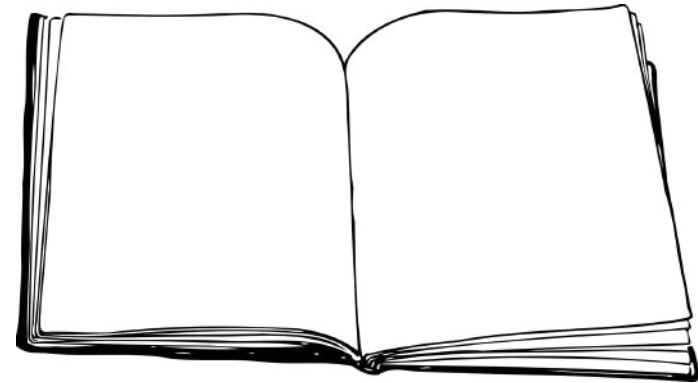


Tailor your communication style

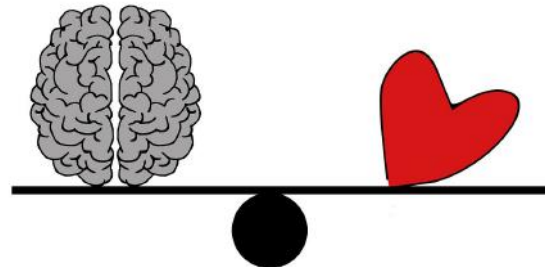
- Follow the rules!
- Adopt a style that resonates
 - What keeps them awake? What keeps their boss awake?
 - Big picture or lots of detail?
 - Commercial language – ROI and financials
 - Stats or stories?
- Prepare for different levels of detail



At your institution...



Stats and Stories



Getting investment at City



Deliver the pitch

- You know who and what will influence the decision
- Well researched business case: pre-empt adversaries
- Compelling delivery: stats and stories, supported by advocates & allies
- Documents and data to back this up
- Well prepared for questions



How did I do this at City?



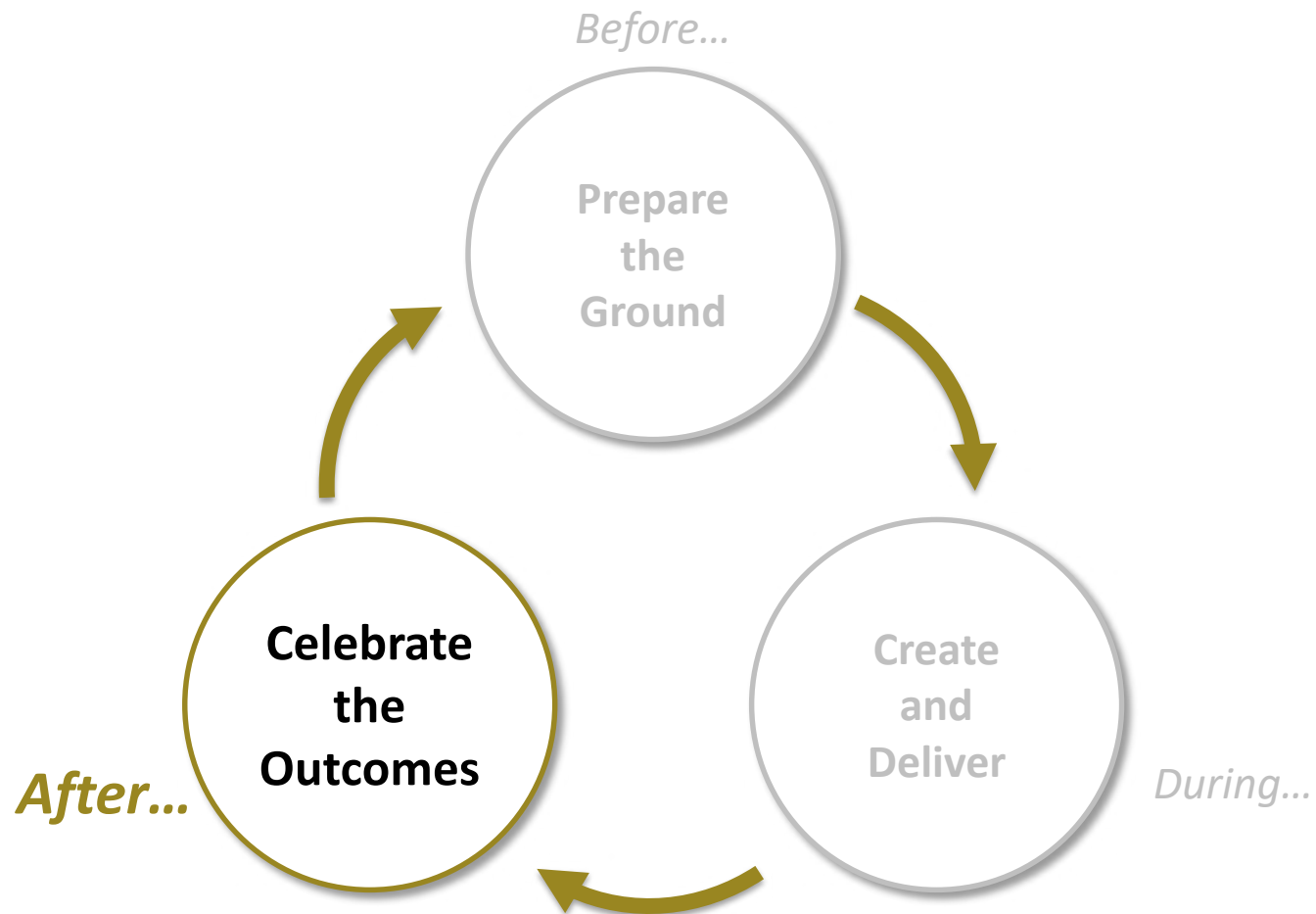
Summary of Key Benefits

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XXX X X XXX XX XXX X X

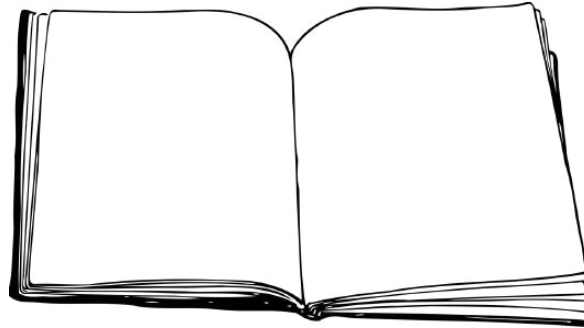
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Project Name	Start Date	End Date	Status	Progress (%)	Comments
Project A	2023-01-01	2023-03-31	Completed	100	Project A completed successfully.
Project B	2023-04-01	2023-06-30	In Progress	75	Project B is currently in progress.
Project C	2023-07-01	2023-09-30	Not Started	0	Project C has not yet started.
Project D	2023-10-01	2023-12-31	On Hold	0	Project D is currently on hold.
Project E	2024-01-01	2024-03-31	Planned	0	Project E is planned for the future.





Celebrate the outcomes



Tell your story



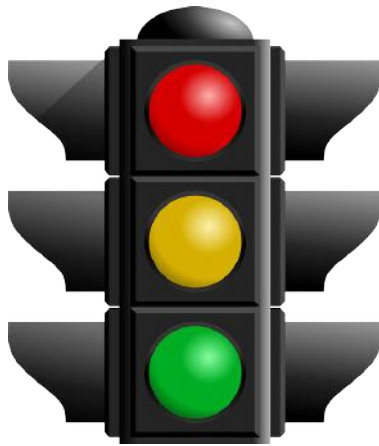
Highlight mutual
accomplishments



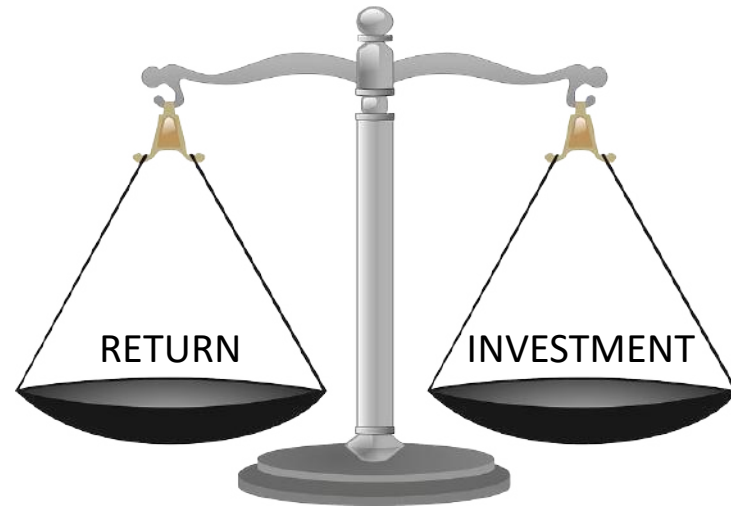
Keep decision makers
informed



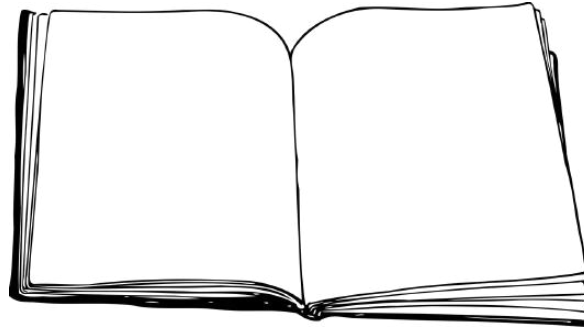
Linking your story to the institution's story



KEY
PERFORMANCE
INDICATORS



Celebrate the outcomes



Tell your story



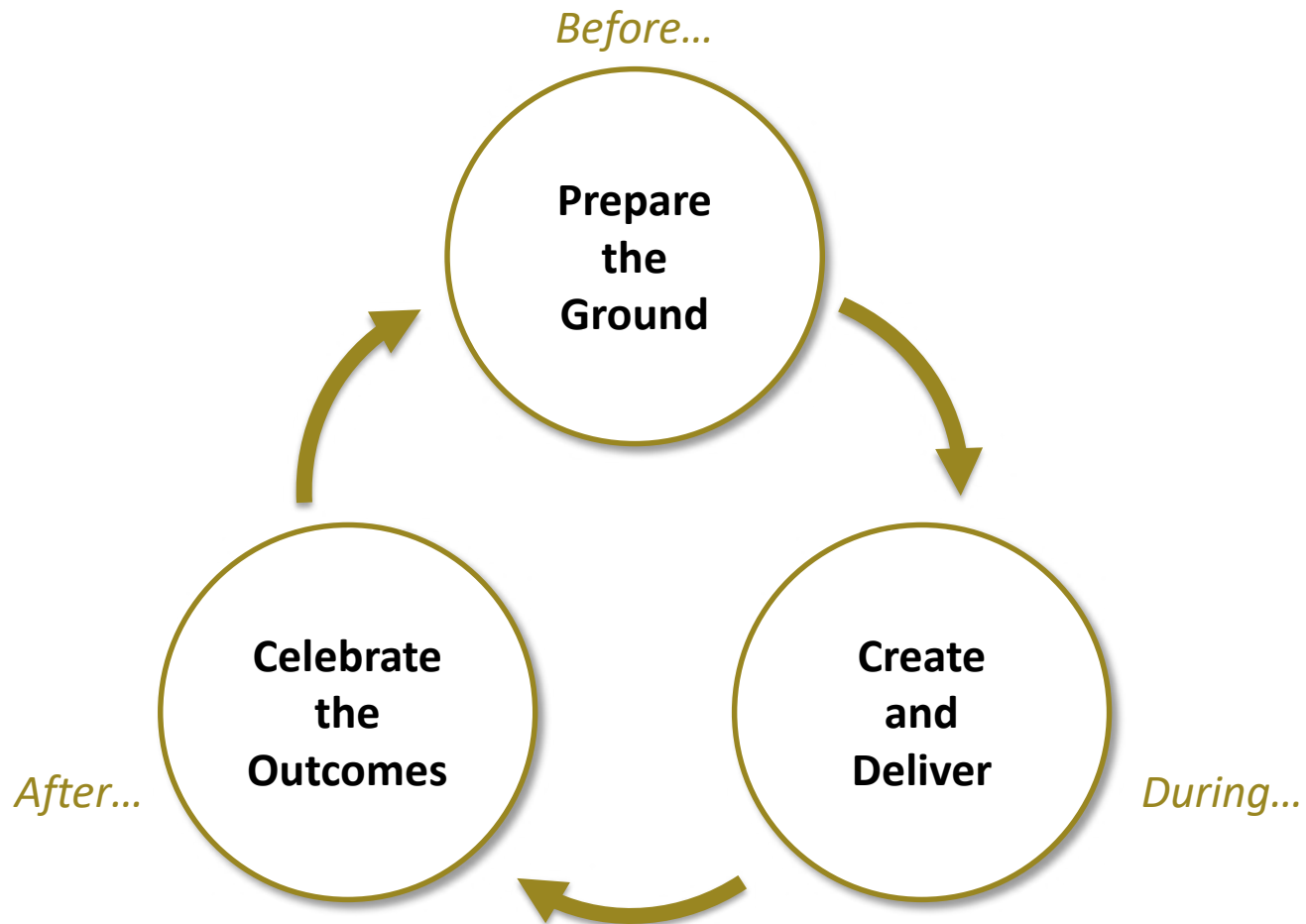
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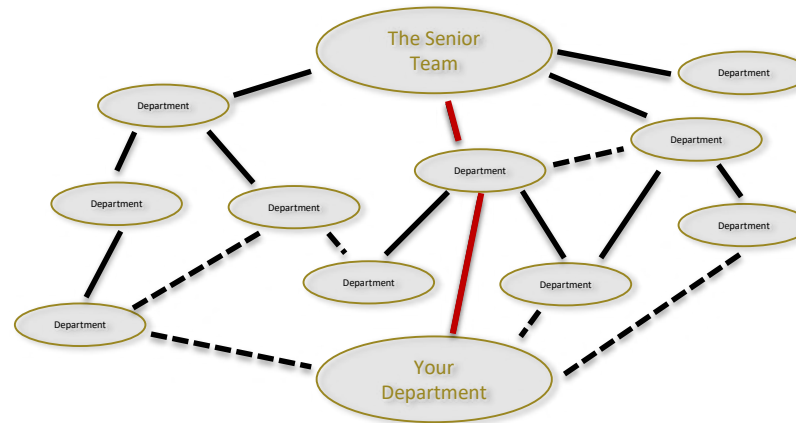
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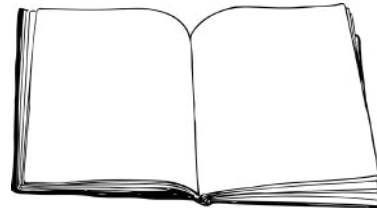
The virtuous circle



When you get back to your desk...



Create your map



Stats and Stories



Key Performance Indicators




Questions



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