**HELOA National Conference January 2020**

**‘Creating Compelling Business Cases’, Gary Argent, Graduate Transitions**

**Hidcote Room, 9:30am, Friday 17th January 2020**

*Red & Italic = Actions*

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* Session will cover how to make business cases to get investment to develop your teams and services
* Gary spent 4 years as graduate recruiter travelling to universities
* Recently spent 4 years at City Uni London running the careers team
* Had to always ask investment as he went along
* More people in the room don’t regularly write business cases so this will be useful in the future
* Ice-breaker activity – Who Am I?
  + Members would write a famous person on a sticker, stick it on someone else’s back whilst having one stuck on their own and then with only two ‘Yes or No’ questions per person before moving onto the next, try and figure out who they had stuck on their back
  + Showed how important it is to create rapport, speak the same language and understand what motivates each other
  + Create rapport with the ‘decision maker’
  + Speak the same language as the decision maker – make sure they understand what you’re talking about
  + You may be regularly talking to someone who you don’t know, so good to understand what *motivates* the decision maker
* Create the right conditions for GOOD INFORMATION EXHANGE
  + Being efficient for both sides is best
* Gary explained how difficult it was for him at City University London to get funding for existing teams and even more so to do something new
  + After working for the careers service, Gary then moved into Widening Participation & Outreach – they weren’t a well-understood team within the university
* **Three elements to a good business case**
  + Preparing the ground
  + Create and deliver the actual business case
  + Celebrate the outcomes – what you do *after* is very important, equally if not more important than preparation!
  + All of this becomes a **‘Virtuous Circle’**
    - You’re building reputation and credibility, it will get easier in the future
* **What is a business case?**
  + You will likely be taking advantage of a new opportunity
  + It explores different options to solve the problem you’ve identified and makes a recommended suggestion(s)
* **Preparing the Ground**
  + Understand the landscape – do the research
    - Gary understood when he joined Higher Education that he didn’t know much about how universities were structured and worked – how did every department interact with each other and where do we fit?
    - What are the priorities of the institution and how is what we are doing contributing?
    - Who are the influences and key players? They have a say in the big decisions
      * They can be put into three groups:
        + Advocates (they clearly understand and shout about what you do, you really want these)
        + Allies (quite a large group, broadly sharing your objectives but may not be prepared to shout about your mission but they won’t block you)
        + Adversaries (actively opposed to what you are trying to achieve – understand who they are and why they are against you)
    - By the time you’ve done this, you’ll have loads of information to approach the decision maker with – you understood who they were, their priorities, who they listen to and their perception of your service!
    - Useful tools for this:
      * Draw a ‘map’ of the university structure and departments and how they interact with each other, how they’re connected to MY department (bear in mind, the map often changes, it’s a fluid and living thing – really valuable to have!)
      * Stakeholder table, those with a vested interest in what we do within our university – what drives them and what keeps them ‘awake at night’ as part of their role? What was their perception of what we did (often it’s incorrect)? Understanding those measures of success is important to have as you want to make sure you hit those buttons with them!
      * *See Gary’s slides for example of these tools used whilst he was at City University London*
  + Brainstorming possible solutions and decide on the one you’re going to follow
    - How are you going to actually solve the identified problem? Make sure you’re clear on what the problem is – have a clear set of objectives and a problem statement
    - Don’t do it in isolation – get your stakeholders and teams involved *early*
    - Think about the status quo – what happens if we don’t change anything? May have some benefits as well as disadvantages
    - Your preferred solution is what you’re pushing
  + Maximise visibility and cultivate alliances – raise your profile and credibility
    - The way you and your department are perceived at university
    - This will increase chances of either success or failure
    - Your personal reputation is important
    - The more times you go around this circle, the better chances you’ll have next time
    - Who are your supporters?
  + The power of ‘the elevator pitch’!
    - What is your goal? What are you trying to achieve?
    - Describe your compelling vision of the future - “In 6 years’ time, we’ll look like THIS”
    - Explain why this needs to be yourselves doing it – others are going after that investment too!
    - Practice (and get your team to practice too) – become confident with yourself and confident in your colleagues
* **Create and Deliver the Business Case**
  + Explaining what you’re trying to achieve – that clear problem statement, you’ve got to be really clear upfront and provide the alternative solutions
  + Highlight the solution you wish to follow and justify why it’s the right choice (compelling vising of the future, good to use benchmarking against competitors)
    - City University VC used to have a ‘comparator’ list in order to stay aspirational and see how to measure progress
    - HELOA is a kind of ‘comparator list’ – this is wonderful!
  + Present plan of next steps – if we get this investment, what are we going to do?
    - Talk about costs, returns on investment, risks – get help from other people or departments if you don’t understand parts of it entirely
    - Be clear about responsibilities – what resources will they use and what support will they need?
    - Dependencies – you’re not going to be delivering this in isolation, who else does your success depend on?
  + Tailor your communication style to your decision maker
    - There’ll be some rules or template within your institution/department you have to follow to submit your business case but there’ll be wiggle room too
    - Adopt a style that resonates
    - Prepare for different levels of detail – do they want the big picture? Do they want to know details on specific parts rather than others?
    - It comes down to stats and stories – do you make decisions with your head or your heart?
    - Sometimes stats and stories can be both!
    - When you’re presenting a business case, give THREE KEY FACTS MAXIMUM – they won’t retain any more than that but make sure you’ve got the detail to back it up later
  + Infographics are great! Use them!
    - Gary used the physical student comments/feedback ledger from the Careers Service building when presenting a business case – it really worked
  + Delivering the pitch
    - If you’ve done the research, you’ve already done the hard part
    - The elevator pitch is valuable
* **Celebrate the Outcomes**
  + Don’t stop! Make the most of the success stories!
  + It’s about how you tell the story of the results of your investment – be clear about what has changed as a result of this investment
  + KPIs and returns on investment
  + Thinking about how your dept’s KPIs fit against the university’s KPIs is good
    - For example, the City Uni volunteering team made the university a good community member
  + Could be a financial return on investment or other returns!
  + Highlighting mutual accomplishments
    - Others around the university assisted you – celebrate them too! Make sure you’re vocal about that!
    - It could turn adversaries into allies or advocates
  + Keep the decision maker informed – it shouldn’t be the last thing they see
    - Especially important for those not on the frontline of your interactions
* **Three Monday-morning thoughts for when we’re back at work**
  + CREATE YOUR MAP
  + COLLECT STATS AND STORIES
  + THINK ABOUT YOUR KPIs AND HOW THEY MEASURE AGAINST THE UNIVERSITY KPIs
* **End of session**