

CREATING ORGANIZATIONAL BUY-IN





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Being the catalyst of change for new ideas in an organization comes with great benefits and lots of hard work. New ideas can vary from a new sales process to a new sales training curriculum to investing in a new executive briefing center to hiring sales coaches to growing the enablement team to moving training center locations and more. These ideas are transformational and involve a lot of different stakeholder and organizational buy-in.

Uncovering problems to solve and championing is not for everyone. The political savviness required to make change happen is very high. We need to know how to communicate the vision of the idea without upsetting people who may already be quite married to the status quo. We need to co-build a business case with our executive sponsors to justify investment and action. We need to know how to engage with all stakeholders, especially the naysayers. The skeptics are the ones we have to win over before an idea gets squashed. The naysayers have to feel as though they have a say and are part of the team championing a new idea. Without them, ideas may never be executed.

In his book *Buy-In*, Harvard Business School professor John Kotter explains the importance of gaining others' support in order to create real institutional change:

Buy-in is critical to making any large organizational change happen. Unless you win support for your ideas, from people at all levels of your organization, big ideas never seem to take hold or have the impact you want. Our research has shown that 70 percent of all organizational change efforts fail, and one reason for this is executives simply don't get enough buy-in, from enough people, for their initiatives and ideas.

In this chapter, we will explore the steps and tools to create and sustain organizational buy-in for enablement initiatives.

The Salesforce Training Center

The story I'm about to share is a great example of how enablement leaders can turn vision into reality. Many times during my career at Salesforce and afterward, people tried to convince me not to pursue an initiative. The words "it'll never happen" are said quite a bit at companies. It's too hard. It's too complex. It'll never get the support of leadership. It's too expensive. If you believe your idea is right and you have the business case to justify it, stick with your gut and make it happen. The rewards are huge both personally and professionally.

I was responsible for many strategic initiatives during my time at Salesforce. One of them, relocating the Salesforce Training Center, is a great example of the complexities around creating and sustaining organizational buy-in for a new

enablement initiative. For years, the Salesforce “sales training boot camp” program was housed in a training facility off campus, in San Mateo. One of the main problems with it not being located in the Salesforce headquarters in San Francisco was that executives and product managers did not want to travel to it to motivate and inspire new employees.

We wanted our new employees to experience the culture in our San Francisco headquarters and walk away with a great sense of who we were. We wanted them to feel pumped up and jazzed about the company and culture. We spent hundreds of thousands of dollars every month flying them to San Francisco to then ship them to the off-campus location. It was a letdown. The survey feedback scored the content and agenda high but the location low. The quality of speakers declined month after month and ultimately lowered the quality of the program, which resulted in lower sales productivity. The business justification became clear. We needed to bubble up this initiative to secure funding from non-sales departments like finance, human resources, and real estate.

We started petitioning to move the new-hire boot camp program to San Francisco. The move impacted many organizations and budgets. Over an eighteen-month period, a cross-company committee that covered almost every department in the company met weekly. (Yes, you read it right; it took us over eighteen months to get to a positive decision.) The decision involved real estate, finance, human resources, sales, and marketing, and ultimately made its way to Marc Benioff’s executive committee. It was that big and that political.

The steps to make the decision happen were extensive. We created a vision statement. We educated each stakeholder department on the value and business justification. We built

a business case that included travel expenses and real estate costs. My team and I took charge of collating data and building spreadsheets. Our vision statement kept us focused on the “why.” We created a business plan using the Salesforce “V2MOM” (vision, values, methods, obstacles, measures) framework. Every time we met a team and leaders, we shared the vision statement and the business case and showed an image of the new training center in San Francisco. One of the biggest benefits of this initiative was having everyone downtown, where we could connect people and culture. The quantifiable benefit was the faster ramp time we were expecting because of the increased participation of executives, product managers, and subject-matter experts.

Other initiatives that required the same level of buy-in included our sales process, building executive briefing centers, and growing a team of sales coaches. We followed a similar method to get organizational buy-in.

Anyone leading enablement will be faced with decisions. Where to focus? What initiatives need funding? How many initiatives can be done at once? What new projects will require more resourcing? What projects should stop because they have not had the expected impact? To get enablement initiatives funded and executed requires vision, business cases, advocacy, frequent communications, and the tenacity to stay the course.

Perseverance and tenacity are very important in driving organizational change. When you see something that can be improved, don't get overwhelmed. You can lead the charge to make it happen even if you don't have authority over all the resources and budgets. You have a clear picture of a better future. The question is, How do you get all stakeholders aligned? How do you integrate their ideas with your vision?

How do you make your vision their vision? Many great ideas fail because of poor communications and alignment of ideas.

Six Steps to Drive Organizational Change

Being a catalyst of change requires vision and persistence. John Kotter, in his book *Buy-In*, provides many thoughtful insights to help promote good ideas to happen. “Organizations don’t prosper unless managers in the middle ranks identify and promote the need for change. People at that level gather valuable intelligence from direct contact with customers, suppliers, and colleagues.”⁵ There will always be resistance by people to support new ideas. Ideas happen by getting executives and middle managers to support them. Middle managers will always find excuses. Don’t attack their opposing views. Be curious and understand their motivations. It’s important to include these opposing views and people in the conversation and win them over.⁶ Here is a six-step process to drive organizational change by aligning your people with proposed changes to your new processes and new programs.

Step 1: Draft a Vision Statement

The purpose of the vision statement is to begin to introduce a big idea to the executive level of your company to use to rally

5 Susan J. Ashford and James R. Detert, “Get the Boss to Buy In,” *Harvard Business Review*, Jan. 2015, <https://hbr.org/2015/01/get-the-boss-to-buy-in>.

6 Good interview and discussion with John Kotter with many great tips to think about before your next big meeting, “Buy In: How to Save Good Ideas from Getting Shot Down,” *Harvard Business Review*, Jul. 19, 2012, <https://hbr.org/2012/07/buy-in-how-to-save-good-ideas>.

everyone at all levels behind the idea. Putting a vision statement on a slide or in a document is an important step. It says that you are serious and that you have put some thought into the idea. It also shows that you are asking for collaboration and help.

Start by isolating the problem and drafting a clear, concise vision statement. Be clear on the problem and the benefits. The vision statement should be inspiring, inclusive, and action oriented. It should also outline metrics and a quantifiable benefit. Keep it in draft form to create a collaborative and inclusive process from the very beginning.

Anjai “AJ” Gandhi reached out to me in late 2016 to talk about a big initiative that he was leading at RingCentral. He called me a few months after starting his new role as vice president of sales strategy and operations. The company was on a mission to extend its lead in the unified-communications-as-a-service market and break away from the competition. He said: “A key component was to develop a sales process methodology for optimizing our sales approach to the mid-market and enterprise segments.”

We jointly crafted a new sales process methodology, refining it with sales leadership, and then developed a change management program to drive adoption. It was a big corporate ticket item and one that required significant funding and support from the senior executive team. This is the vision statement AJ shared with leadership: “Extend RingCentral’s market leadership in cloud communications by improving sales productivity and accelerating growth.”

AJ and his team worked with all segments of the business and key go-to-market partners (direct sales, channel sales, marketing, and customer success) to tailor the sales

methodology to the needs of the business. The sales teams engaged in a one-week deep dive workshop to learn the new sales methodology and then conducted ongoing reinforcement huddles to practice and refine their skills. The program has made a big contribution to the accelerating growth and increasing sales productivity of RingCentral.

Another example of a great leader who tried to gather executive buy-in is Mark Siciliano. As vice president of sales productivity and effectiveness at Demandbase, Mark “sold his enablement vision to the highest levels in the organization.” Mark asked for a meeting with the board of directors to share his vision of what sales enablement should be for Demandbase. This organizational alignment tactic resonated with the board and paved the way for great program success and faster business outcomes.

Step 2: Assemble a Diverse and Inclusive Team

Once you have some executive-level support for the draft vision, assemble a cross-departmental team representing a diverse set of opinions. The team should be inclusive but not exclusive. Set up an advisory committee. Kotter calls this step in the process “inviting in the lions.” Look for a diverse set of opinions and people who will have objections. It’s necessary to take a genuine interest in the opinions of stakeholders and not come to the discussion invested in a particular outcome. The committee should include a cross-section of roles and people and be set up to discuss and debate issues.

Step 3: Build the Business Case

The committee should build a well-balanced business case justification that includes a cost-benefit analysis. The committee

should all be behind the business case. At a minimum, every enablement initiative should include the following committee members: sales managers, salespeople, and people from sales operations and marketing.

The business case should look at all quantifiable and non-quantifiable dimensions and prioritize the top metrics expected to make an impact. Look at metrics such as pipeline, win rates, average deal size, ramp time, and those discussed in chapter 6, “Go-to-Market,” where I discuss metrics. Build a model that calculates the expected return on investment of your prioritized sales enablement initiative. What you are trying to do, why you are trying to do it, and what the expected return will be should be crystal clear.

Another way to look at the business case is from a sales headcount perspective. What will deliver more return on investment: another quota-carrying salesperson or using that money to drive an initiative? These are the kinds of open and transparent conversations you want to have when discussing the business case. Make the ROI clear, and communicate it to all stakeholders. There is no reason to be shy about the business impact you expect to see. That is the ultimate tool to gain organizational buy-in for your top sales initiatives.

Step 4: Communicate Frequently

Communication needs to be frequent and crystal clear. A constant drumbeat of communications is critical to keep momentum going. A regular weekly update summarizing progress and next steps is a smart tactic. Be consistent in communications. If the project is ongoing, send an update every week at the same time. If progress isn't being made, don't skip a communication update. Once a decision is made,

it is time to get posters and banners and start promoting the merits of the initiatives. Communications is as important in the pre-planning, planning, launch, and ongoing. Don't let your ideas and initiatives go sideways with suboptimal communications.

Step 5: Be Hands-on with Stakeholders

An important step is to work with the stakeholders, hand in hand, to show them what their world is going to be like. For real estate facility improvement, like my Salesforce training center initiative, take people on tours. If you're rolling out a new sales process, sit on some calls with salespeople to show them how the process works. If you're working with marketing to publish a new product playbook template, do the first one with them until they are comfortable with the process changes.

My friend Bob Kruzner, the director of sales enablement at ServiceMax, a GE Company, shared a great strategy he does with his sales teams to ensure buy-in. It is both tactical and powerful. Over the years, Bob has rolled out many new systems and programs and finds that buy-in breaks down when people are not trained and onboarded properly. He mentioned an experience where he was personally trying to use a new system, and after the roll-out he felt as though the company spent so much money to fund the project and failed at the end by training him on how to use the system. "We have this new tool," he said. "I don't know how to use this new tool. We made this big investment, and we never got trained." He took this lesson and now makes sure that he drives personalized and hands-on training for educational and buy-in purposes. In his sales enablement program at ServiceMax, he

walks his salespeople and sales managers through new-hire onboarding. He goes step by step to explain the intent to his people. Once people get it, they buy in. “A light goes on, and then I know we have them,” Bob said.

Step 6: Keep the Momentum Going

Finally, focus on sustaining organizational buy-in. Avoid the shiny new penny syndrome and stay the course. Do this by carrying the initiative across the finish line and then sticking with it. Revisit the vision and goals of the initiative that was approved and in action. Set a quarterly or monthly team review. It takes time for new initiatives to stick and become part of the fabric of a culture and company go-to-market. Enablement professionals are great at sticking around and making sure initiatives are working as planned. Conduct surveys post launch to make sure the intent and sentiment are aligned with the vision and goals.

Many organization-wide initiatives fail because they lack a champion owning the last mile. I was having lunch with Laurie Schrage, vice president of sales operations at Tealium, and she commented that enablement professionals are successful because they do “full-swing program execution,” meaning they carry all initiatives across the finish line and ensure the work is done to plan.

Understanding Stakeholder Motivations

Enablement leaders need to understand and cater to many stakeholders in bids to drive transformational initiatives that require cross-departmental organizational buy-in. Each stakeholder has their own motivations, expectations, and

communication styles. Tailor your approach and messages to each role and persona.

Executive Stakeholders

When you seek to secure organizational buy-in, you must win over top executives like the CEO, COO, and CFO. They want decisions to be made thoughtfully and quickly. They love when problems are presented to them with solutions that already have consensus. Your executives expect clear, concise, data-driven communications. When you present an idea or share a point of view with your top executives, do not start with the detail. Open up the communications with the headlines. Explain the “so what” first. Communicate to your executives as though they are skimming the headlines in a newspaper. Speak to the big-picture, macro level first. Have the detail ready if your top executives want to drill down to learn more. Also, when working with a CFO, it is important to have mastery on the numbers and financials. Know your audience.

Another stakeholder you will work with a lot is the vice president of sales. Arguably, they are the most important stakeholder, and you are employed to serve them. If your vice president of sales is not making money and is not performing at the expected level, they will not last long in their role. Being clear on that reality is important. They are motivated by quota and revenue goals. They expect everyone around them to help them sell more. A sales VP is interested in closing more business. Be mindful about what their challenges are. If they are behind in hiring, do not walk into their office to talk about initiatives that do not help recruit more salespeople. If they are short on pipeline, then follow the same rule and avoid talking about anything but ways to build pipeline.

If you have to get their mindshare, make sure they are in a good space. There is nothing worse than approaching a sales VP with a great idea at the wrong time and losing credibility and momentum. Timing is everything with sales VPs. When presenting ideas or initiatives, make sure to explain to the sales VP what it means to them, their goals, and their teams hitting more quota faster.

Working with marketing and CMOs is quite different than sales. Marketers have different priorities. They are focused on product launches, communications, advertising, public relations, marketing events, branding, and campaigns. CMOs and marketers want to be efficient about helping sales be successful. You need to be respectful that marketing has their next big thing right in front of them. Just like sales has a monthly, quarterly, and annual rhythm and business reality, marketing has their own. Know what is on their marketing calendar, and align with their schedule for review meetings and brainstorming. The message that is hopefully coming out loud and clear is that when you work with stakeholders, you should be mindful of their priorities and schedules.

Sales Managers

Engaging and getting buy-in from sales managers is critical too. You'll find that sales transformation initiatives lacking complete buy-in and support of the front-line managers will be challenged from day one. They are responsible for hiring, training, coaching, building pipeline, and closing business. They are overworked, and they are usually chasing their monthly and quarterly numbers. Setting up a meeting on the busiest day or during the busiest time of the year is not a winning strategy to secure buy-in from this group. The sales

manager is a great person to engage early and often when you are drafting strategies for sales enablement programs. They are usually former top-performing sales executives. They are looking for new challenges, and front-line sales management is a logical path. You should always have a core group of sales managers on speed dial to keep you honest. They are a great set of folks to brainstorm ideas. Some of my most fond professional relationships from my time at Salesforce are with front-line managers. Until this day, we help each other.

Salespeople

Another group of stakeholders for you to consider when creating and sustaining organizational buy-in is salespeople. You should prioritize and create programs based on what salespeople need. A data-driven point of view is important. It also helps to always be at the pulse of what your salespeople need and what they are thinking. When your CEO calls you or your VP of sales calls you, rest assured they will ask, “What’s going on in the ranks? What are our salespeople thinking?” It is always good to have a point of view and examples to back up what you are sharing. Trust me, the call will happen. You want to always be ready.

Regarding organizational buy-in, you should be clear on the value to the salesperson and be able to answer their question, “What’s in it for me?” If you do not address their needs and communicate why they should care, you will never have a successful rollout of whatever you are trying to do. Set up committees that you can tap into when you have questions, and have a few salespeople on speed dial. As a salesperson, I care about closing more business with less work. Salespeople want shortcuts to success, and they want the secrets of

success, now. Know this as you tailor your vision statement and business case and communicate value.

As a tip, do your thinking on each stakeholder's most common objections. Write them down. Role-play them with your team. Create a slide for each one. Be prepared to show the slide(s) when you are meeting your stakeholder. It is always better to lean into an objection to better understand the real motivation of the objection instead of getting defensive. You need to apply some sales fundamentals like objection handling to secure organizational buy-in. The trick is to uncover objections to avoid surprises.

Getting Ready for the Big-Decision Meeting

Here are some tips that will help you avoid any big organizational buy-in surprises. Let us assume you have a final decision meeting or final presentation meeting planned. You have spent weeks, months, maybe even years planning and preparing for the big meeting. Whether it is a meeting with the CEO, or top executives are coming together to vote on your initiative, it is important to be clear on what you want to achieve in the meeting and avoid small talk.

I also highly recommend that you know the outcome of the meeting before you walk into the room. It might seem devious, but it isn't. Know who will be in the room and do these actions with every person:

1. Schedule a meeting at a reasonable time for everyone.
2. Talk to your meeting participants one-on-one about the meeting goals.

3. Send them a brief explaining the meeting goals.
4. Ask them if they have any objections or concerns.
Be curious.
5. If they do, answer them. The last thing you want is any major obstacles coming at the end.
6. Share the presentation with each person before the meeting.
7. Walk into the meeting knowing what each person is thinking.
8. Bring printouts of the necessary slides and materials as a courtesy for folks to flip through during the meeting. It's old school, but folks appreciate it.
9. Do not get defensive if things go wrong. Be professional.
10. Send executives a handwritten card after the meeting, thanking them for their support.

Treat the meeting and the decision just like you would handle a sales cycle. Follow all the best practices that a professional salesperson would if they were working on closing a big deal.

KEY TAKEAWAYS

I had a lot of fun writing this chapter. It forced me to think about all the sales enablement initiatives I worked on and to realize that one of the big reasons some did not do well is that I did not secure the right organizational buy-in. My big takeaway is you should not assume anything. Organizations

and teams have so many competing priorities. Follow the six steps to secure and sustain organizational buy-in: draft a vision statement, create authentic and diverse advocacy, build the business case, communicate frequently, be hands-on with stakeholders, and keep the momentum going. Do not forget that driving big sales transformation involves people who want to be heard and feel as though they have a say in their future.