

# 4 Steps to Getting Executive Buy-In for Field Service Software



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If you are wondering how you can get your senior team to authorize and support the procurement and implementation of FSM software, a methodical approach will serve you best. The following four-step guide will help you to cover all the angles and make sure that your executive team will buy-in or, at least, that they will not be able to refuse without first giving serious consideration to your plans.



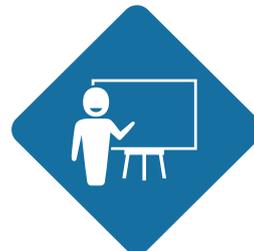
**Step 1**  
Prepare a Realistic Budget



**Step 2**  
Gather Feedback from Employees



**Step 3**  
Oil the Wheels and Prepare Your Case



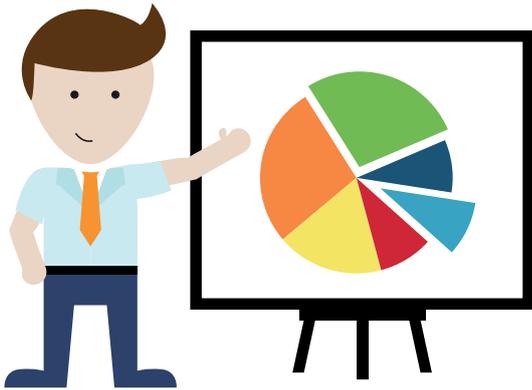
**Step 4**  
Pitching the Case for FSM Software





## Step 1: Prepare a Realistic Budget

Even if you can pitch an incredibly persuasive business case for FSM implementation, the board will likely want to know how much it's all going to cost before giving your ideas any serious evaluation. Therefore, the first step is to prepare an estimated ballpark budget for software procurement and implementation.



### Do Your Research

With a little research, you will be able to obtain some guide prices for a software application to suit your operation. For your budget to be realistic though, you need to consider four sets of costs which will need covering to implement a solution:

- License fees for the software
- The purchase and installation costs of any new hardware that may be required
- Maintenance fees
- The costs for the vendors to support your implementation

The toughest calculation for estimating a ballpark budget will be the implementation support costs. As a very rough guide though, you should apply a 1:1 ratio of implementation service cost to software purchase cost. So for example, if the overall cost of software will be \$7,000, you should factor at least the same amount for implementation services, making the total cost \$14,000, plus maintenance fees and any hardware costs.



## Step 2: Gather Feedback from Employees

The C-Suite occupants know that, as a company's most valuable asset, an engaged workforce is critical to business success. If you can show your CEO that the workforce believes a change is needed, he or she will probably feel bound to consider your employees' views.

### Talk About Their Feelings

Gauge your employees' feelings about working with a software solution by conducting a brief survey. Of course, you will need to brief your team about how FSM software can solve problems they experience in the course of their work. Now is as good a time as any to begin preparing your workforce for the change. Start by asking them about their work-related issues, then let them know which of those issues FSM software can solve and gather their views about working with the new technology.



There are two important points to remember when soliciting the feedback from the workforce:

1. Formulate your survey in a way that provides quantitative information. The executive team will pay more attention to numbers than to a collection of qualitative viewpoints.
2. If the survey results aren't as positive as you would like and suggest that more work is required to sell the workforce on FSM software, don't use the results in your pitch to the chiefs. Either omit this step or work on the employees some more. At least the survey exercise will provide an insight into issues that frustrate employees, which can be put to good use now or in the future.





### Step 3: Oil the Wheels and Prepare Your Case

At some point, you will probably need to present your case for change (FSM software-driven processes) to the entire executive team. You will need to prepare carefully for this event. Before expanding on what preparation steps to take, here is an important point to note: One presentation is not likely to convince the CEO and his/her team to buy-in overnight. Therefore, as part of your preparations, try to find opportunities to speak with execs individually and tell them about your proposal. With luck, you will be able to get one of the business leaders on board. He or she will become a powerful ally in persuading the rest of the senior team.



Regarding the rest of your preparations, you already have a budget and hopefully some workforce support for change. Additionally you will need to prepare the following information:

- Some **quantitative data**, showing existing problems and their impact on productivity, efficiency and customer service levels
- Some **projections** about how FSM software will reduce the problems and their impact on the bottom line.
- If possible, obtain one or two **examples**, with facts, of competing companies who have had success with field service management software.

When you have all this information compiled and ready to present, it will be time to schedule step 4 - the main event.



### Step 4: Pitching the Case for FSM Software

Getting buy-in from the executive team will probably require a series of meetings or discussions. Whether it's one meeting or many, this fourth step is relevant throughout. The goal is to get the go-ahead and the declared support for an FSM software implementation.

#### Boardroom Tactics to Secure Objectives

- Begin by persuading the executive team that your operation needs to change. When you have them nodding in agreement to that point, you are halfway to winning the battle.
- When you move on to present your change proposal, deliver an overview. Have all the details ready to provide as and when requested, but don't try to present a detailed account of all software features and how you will manage the implementation. Just present an overview and all the information you gathered about current operational problems and the ways in which FSM software can resolve them.
- Save the budget information until you're asked about cost. If someone asks you about cost while you are midway through presenting the need for change and the proposal to implement software, explain that you have drawn up a budget and will present it after you've fully explained the proposal.

#### Follow Up

It's unlikely you will get any answers from the executive team at the end of your presentation or even after they have slept on your ideas. You will likely have a whole lot more questions to answer. But being asked detailed questions is a good sign that the executives are preparing to seriously consider your proposal. The best thing you can do now is to perform all the follow-up activities you are asked to complete and be ready to start vendor selection when the board signals its final approval.

