

Making Your Case

Give your boss what she needs to get what you want

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Have you had a good idea that you let percolate for a while, shaping and reshaping it in your mind? Then you run it by a few workmates, until you believe it is solid and are ready to bring to your boss.

The day comes to tell your manager the idea, you make your best pitch, and he says *No*. Huh? How could he say *No*! What happened? You wonder, where did I go wrong?

Perhaps you just didn't know how to make your case. Maybe there are some things you didn't consider. I often see this with some of my clients. They have had good ideas but could not get the manager to buy in.

Are you ready to start fresh with the process of making your case? Good! Let's get started. (We addressed "making your case" at a CCMA conference seminar last year, and it was received so well we have added it to our Rising Stars seminar: rising-starsseminar.com.)

Speak the language

I was reading an article called "Managing Up" and came across this quote:

"If we want someone to understand what we have to say, we must learn to speak their language, rather than expect them to learn ours." ("Managing Up," Thomas J. Zuber, M.D., and Erika H. James, Ph.D.; American Academy of Family Physicians).

Which leads to the first question to ask ourselves when we want to make our case: What language does your boss speak?

- Finance
- Employee satisfaction
- Customer service
- Community service
- Big picture

It's important to know her language so you can best frame the discussion. What is going to be the topic that will make your general manager or department manager sit up and take notice of your idea?

Sell your issue

The first thing to remember is that bosses aren't mind readers. Whatever you leave out of the story will only make your pitch harder for them to grasp.

To get what you want in your organization, you have to ask for it, and you have to sell your boss on

the issue. If you don't ask, you don't get!

Choose your timing. Timing is critical when you want someone to listen to you. Ask your boss when she will have free time, give her a window of time during which you would like to have the conversation, and be realistic on how much time it will take. Be prepared to pitch when you first ask since she may say the best time is now.

Provide adequate information

Information is power—for both of you! A poorly informed boss cannot advocate for your needs or make the best decisions for your department.

Be willing to share what you know and to keep your boss informed at the level that fits his work style. Don't overwhelm him with a lot of personal story if he likes things short and sweet. You could lose him before you get to the most important part of the pitch. If your boss is already overwhelmed with too much work, think of how you will frame the conversation so that your project doesn't seem like another burden.

Listen to how you ask for what you want. For example:

- I'd like to buy new shelves for my case,

- But my boss says there is no money available.

What happened there? Nothing, because we used the language of cancellation without even realizing it. When you use “but,” it cancels anything that follows it, so the conversation is over.

How do we frame our question to generate a more positive response? Let’s look at the language of possibility:

- I can increase sales for the department,
- And to do this I need new shelves for better merchandising.

Now, how powerful is that? Asking the question this way gives your general manager the opportunity to answer more positively. Two things happened in this statement: we used “and,” which connects, and we provided a solution to a problem while asking for what we want.

Once you have framed the issue, you have to figure out how to present it.

Go by the numbers

Mel Braverman of CDS Consulting Co-op calls it creating a one-pager that will answer some basic financial questions for your manager. What boss isn’t going to want to know the financial impact of any new project or idea? You’ll need to do your homework and crunch some numbers so you can answer:

- How will you pay for it?
- How will it pay for itself?
- How long will it take?

Allen Seidner (thoughtforfoodconsulting.com) has put together a good form for creating a project proposal. Lets walk through one.

Say you want to buy two new 12-foot produce Euro tables. A financial analysis might look like this:

- Increased Monthly Sales: \$4,500—projected sales increase of \$150/day
- Program Gross Margin: 33%—current store gross margin
- Increased Monthly Profit: \$1,485
- Labor or Other Monthly Savings: \$0
- Total Annual Benefits: \$17,820
- One-Time Costs: \$2,470—(\$1,235 each x2) includes tax and delivery; no installation charge
- Monthly Costs: \$0
- Total First Year Costs: \$2,470
- Total Subsequent Annual Costs: \$0
- Years of Return on Investment: 10—a rough estimate of how long we use a case like this
- Total Return on Investment: \$175,730
- Simple Annual Return on Investment: \$17,573
- Months to Payoff Investment: 1.7

Presenting the numbers can be powerful. This really allows for the conversation to open up. But don’t stop there. What are the benefits?

- Higher sales
- Greater productivity
- More efficiency
- Better morale

- Higher customer satisfaction
 - Fewer injuries
 - Lower workers’ comp claims
- In the case of the Euro tables, it might look like this:

- Adds eight linear feet to overcrowded dry display.
- Allows for separation of seasonal items.
- Provides room for waterfall displays and other better visual merchandising elements.
- Creates a more welcoming entryway display; updates old fixture.

The next step is to look at who and what will support you in your efforts, as well as who will make this project harder to achieve. You may find allies you didn’t even know you had.

Using the Euro tables we pitched as an example:

- The cleaning crew might love the idea because the tables would be easier to clean under and around.
- The wine and grocery buyers might support you because they might get to do more cross merchandising due to the wide-open sides of the tables.
- The manager will love the return on investment.

Get what you need

With these approaches, you have a much better chance of getting what you want.

And yet as the Rolling Stones say, “You can’t always get what you want, but if you try sometimes, you get what you need.”

If your pitch doesn’t fly the first time even with all of your best efforts, focus on what you can change. While you can’t control your boss, you can control your attitude and behavior. Being angry, disgruntled, accusatory or passive will only make things worse.

Learn from the process. When you realize that you do have the power and influence to make things better, you do.

Many of us have pitched a new case or fixtures and gotten turned down, only to realize a year later that it was a blessing not to get what we thought was best at that time. Often we see the needs of the department over time with a different perspective.

If you don’t get what you want, ask what you could do better the next time in presenting your idea.

Bring it home

Making your case always comes down to these tasks:

- Do your homework.
- State your case.
- Use the language of possibility.
- Create allies.
- Know your numbers.
- Describe the benefits.
- Adjust your attitude towards the outcome

You’ll get better each time and eventually will get what’s best for you, the store and everyone concerned. ■

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