

BUILD A 'DECISION MAKER' PERSONA FOR YOUR BUSINESS CASE

HOW IT WILL HELP IN YOUR BUSINESS CASE



1. Provides a shared understanding of the challenges, pain points and higher order goals.
2. Identifies the key priorities or interests to be targeted in the business case.
3. Allows for a deeper understanding of the sponsor's 'needs'.
4. Deeper knowledge may stimulate innovative ideas or products in your offering.
5. Provides a 'checklist' of issues to address as the team prepares the business case.
6. Establishes the pitch and language to meet the needs, interests and biases of the sponsor.
7. Lets you demonstrate your understanding and commitment to the sponsor, their goals and business.
8. Your insights will strengthen your competitive position vis-a-vis other businesses presenting.

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CATEGORY	DETAILS TO CAPTURE
Company and/or Individual profile	<p>This might include</p> <ul style="list-style-type: none"> • Strategic Plan—vision, values and objectives • Business plan— priorities for the current year • Leadership team profiles and organisation chart • Web page—mine for any relevant data that will provide insights i.e.
Business Demographics	<p>This might include</p> <ul style="list-style-type: none"> • Workforce composition—i.e gender, diversity • Age profile of staff • Values as stated in Strategic Plan—often staff 'self select' into organisations that match their values
Known Facts	<p>This might include</p> <ul style="list-style-type: none"> • Annual Reports • Previous approvals or Grants issued • Presentations made or 'quotes' attributed to leadership team members • Use social media to find data

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CATEGORY	DETAILS TO CAPTURE
Goals and Challenges	This might include a PESTLE of their <ul style="list-style-type: none"> • Key challenges • Pressure points • Review press releases
Common Objections	This might include <ul style="list-style-type: none"> • Cost • Sustainability • Governance and risk management
Decision Criteria & Business Case Guidelines	This might be sourced from <ul style="list-style-type: none"> • Expression of interest document • Tender document • Ensure you capture and 'adhere' to minimum / mandatory requirements

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WITH YOUR 'DECISION MAKER' PERSONNA REVIEW YOUR BUSINESS CASE AND BRING IT ALL TOGETHER

<p>1 Bring it all together</p>	<ul style="list-style-type: none"> • Bring your research team together and collate all the findings • Next task your team with the job of finding a shared connection with one new person from the sponsor organisation, organise a 'coffee' catch-up with them and report back and highlight any mismatch of information or insights • Identify any gaps—and fill them in
<p>2 Craft your business case and key messages</p>	<ul style="list-style-type: none"> • Focus on the benefits to the organisation or intended 'end user' - how do you add value beyond what is being sought? • Address each of the organisation pain points, specify how your proposal will address these. • Answer all of the 'common objections' to demonstrate your thinking on all issues—demonstrate your credibility and track record • Reinforce your credentials—make them feel comfortable that they've chosen you • 'Speak' to or address the 'persona'
<p>3 Develop your Elevator Pitch</p>	<ul style="list-style-type: none"> • What is it your offering and how does it meet the brief/deliver benefit? • When and what will your deliver? • What investment do they need to make for what return? • Practice your pitch