



Securing Buy-In

Leverage this exercise when you need to communicate buy-in. Draw out the short and long term vision for your clients. You can also use this to springboard a discussion with your partner and/or team. Divide what you know needs to happen into two parts: a short term and a long term plan.

Short Term Planning - This is the tactical, one year or less plan that's REALISTIC, not what *should* be done because enough BUDGET, TIME and RESOURCES are not on your side. Group them as high-level initiatives relating to at least one benefit and one risk. In other words, what will you gain from this? What's the benefit / result of each initiative? What's the risk if no action is taken?

Example:

Short Term Initiative: Train John on XYZ, because he's a quick learner and has excellent communication skills. Have him train others in the department.

Benefit: A train the trainer model saves money and places ownership on the team to be aligned with all requirements. This model also fosters collaboration. We can start with a pilot group and roll out to larger audience from there.

Risk: The new model/system/process will be going in whether anyone likes it or not. We will avoid chaos and confusion if we put some plan in place now to get ahead of it.

Short Term Initiative _____

Benefit_____

Benefit _____

Benefit _____

Risk _____

Long Term Planning – This is the ideal end-state which the Short Term plan will set the stage for. Assume all the stars are aligned and that’s what you are working towards. Don’t get caught up in the HOW and all the details here. Communicate the long-term goal and what benefits the initiative stands to gain.

Example:

Long Term Initiative: Formalize a Firmwide Training Curriculum. Self-Paced and On-Demand Rollout scalable for thousands of employees with community feedback.

Benefit: Contributes to a COE – Center of Excellence. Aligns with company strategy of eliminating department silos.

Risk: Onboarding new people will not be scalable and the workflow will eventually breakdown.

Long Term Initiative _____

Benefit _____

Benefit _____

Benefit _____

Risk _____

Now create a one slide presentation and divide the page in half. Taking the above initiatives, write down a couple of bullets on what needs to happen to accomplish each side of the house: Short Term vs. Long Term. Memorize and have these in your hip pocket when you start presenting this.

Short Term	Long Term
<ul style="list-style-type: none"> • Benefits / Results • Risks • • 	<ul style="list-style-type: none"> • Benefits / Results • Risks • •

Memorize these short- and long-term initiatives and start self-promoting them. This is your GAME PLAN. Given all of your experience, lessons learned, and know-how you have gained, you are now at the pinnacle of your career. You are ready to up-level, because you have the vision and know what things need to be done (your NEW and IMPROVED way).