

Executive Buy-In Playbook

**You're at the Table...  
Now What?**

**The Guide to Getting  
Executive Buy-In for  
Strategic HR Investments**



# HR has arrived.

At least 50 years of well-deserved hope about a seat at the executive table in the C-Suite has suddenly begun to be realized in the past few years. Many organizations are more focused on their people and culture than ever before. The world of work has realized that people both create value for your organization and deserve to feel valued as humans.

However, many strategic HR leaders — even within organizations claiming to care for and invest in their people and culture — are an afterthought when it comes to organizational vision, mission, strategy, and objectives. Strategic HR leaders need new skills and capabilities to fully partner with the CEO and their executive counterparts who lead different functions and departments.

In this playbook, we will walk you through strategic HR investments — including the different types of strategic HR investments, as well as common objections you may get when pitching strategic HR investments to other executives, and tips for responding to these objections. We'll give you tips on how to frame and present your pitch, and even share some templates at the end to help you craft an internal pitch for a strategic HR investment based on your biggest pain point right now.



# What is a Strategic HR Investment?

Thinking strategically about your organization's people and culture initiatives as a portfolio of investments is an important step for partnering with your CEO, CFO, and other executives to help your organization achieve what you want to accomplish. A strategic HR investment is one that aligns to your organization's vision, mission, strategy, and objectives and aims to deliver a significant, measurable return to your organization.

Examples of strategic HR investments include:

- Technologies like a performance management platform to help you reduce avoidable turnover
- An applicant tracking system to accelerate hiring and onboarding

- Programs such as manager education and coaching to increase manager performance
- Initiatives such as creating and communicating your organizational values more clearly so you reward the right behaviors and retain the right people

## THERE ARE THREE TYPES OF STRATEGIC HR INVESTMENTS:

1. HR-initiated
2. HR-led
3. HR-supported

## 1 HR-initiated

HR-initiated strategic HR investments are created by someone in HR and often focus on outcomes that are traditionally associated with HR, such as increasing engagement and reducing time to fill your open roles. HR-initiated investments are important as HR leaders are often most focused on what their people and culture needs to increase performance, engagement, and well-being.

However, when an investment is HR-initiated, it's even more important to gather buy-in and build partnership with other executives to avoid common, easy-to-nod-along-with objections such as "we don't have time for this" and "how does this help us

hit our numbers?" When not properly timed or connected to business outcomes, people and culture initiatives can feel disconnected and unnecessary to the rest of the organization.

To build momentum for these investments, have 1-on-1 conversations with different executives focused on what's in it for them and their teams prior to budget and planning meetings with the entire team. Ensure that what you want to accomplish is aligned with your organization's vision, mission, strategy, and objectives.



## 2 HR-led

HR-led strategic HR investments are initiated by an executive or leader outside of HR, but led by someone in HR. Oftentimes, HR-led initiatives are easier to build momentum for because you have another C-level executive on your side from the beginning. These investments often create opportunities to benefit your entire organization even if the initial focus is a subset of the organization.

For example, your CEO realizing that your leadership team needs to increase its diversity can create opportunities to diversify your talent pipeline and your leadership bench, and incorporate diversity

and equity in your compensation strategy. Accelerating how quickly your new sales team members hit their quotas can be an opportunity to improve orientation and onboarding for your whole organization. Working on career paths for your engineering team can provide templates for creating better IC roles and leveling across your whole organization. Getting extra value from HR-led investments like this can dramatically increase the impact you and your team have on your organization. Always ask yourself, “How might we use this elsewhere across our organization?”



## 3 HR-supported

HR-supported strategic HR investments involve someone else owning a people and culture investment, with support from someone on the HR team. When another executive identifies a need for a significant investment in their people and culture that aligns with your HR strategy, this can be a gift not only for your HR team, but also for your entire organization. For example, if your CEO, CFO, and CHRO co-own creating equitable compensation and opportunities throughout your organization after your CEO realizes that your performance review and compensation processes are broken, this investment will have much more momentum and impact than if the CHRO is dragging the CEO and CFO along.

The risk of these types of investments is whether or not they are actually strategic and aligned. For example, another executive may want to take your organization in a direction that doesn't align with your people strategy, such as creating a bonus program that conflicts with your compensation philosophy and strategy.

To properly influence your organization's vision, mission, and objectives in alignment with your organization's strategy, your portfolio should include a mixture of HR-initiated, HR-led, and HR-supported investments. This is especially true when HR's own resources are limited.



# Speaking Like an Executive

Executives typically care most about accelerating growth of revenue and profit, reducing costs and risk, and realizing their vision, mission, and values. Therefore, as a strategic HR leader, you and your team need to connect your people strategy and strategic HR investments back to accelerating growth, reducing costs and risk, and realizing your organization's vision, mission, and values. Fortunately, most if not nearly all strategic HR investments can be tied back to what's currently top of mind for the rest of your executive team.

For example, improving your review and compensation processes can reduce avoidable employee turnover, which saves your organization the costs of lost productivity and recruiting costs while reducing the risk of litigation related to unfair compensation. Improving your onboarding and orientation can reduce avoidable turnover and accelerate productivity. Improving leadership and people management through technology, education, and coaching can increase productivity and reduce regrettable turnover. Investing in education regarding DEIB can help an organization realize its vision of becoming a fair, equitable workplace where all team members feel valued for being themselves.

That said, don't assume that other executives on your team will see these connections unless you make them explicit and support them with data whenever possible. They might think of all people and culture programs as soft and irrelevant to their top and bottom lines. Make the connections between your strategic HR investments and the priorities of your executive team clear. Lean into your potential technology partners and other vendors to help you create business cases for the investments that you want to make. Triangulate

your business cases with data from other strategic HR leaders from your connections and communities, as well as analyst and academic research on people and culture topics.



**CONNECT WITH OTHER LEADERS TO DISCUSS WHAT'S WORKED FOR THEM WHEN PITCHING STRATEGIC HR INITIATIVES IN [15FIVE'S HR SUPERSTARS COMMUNITY](#).**

CEOs and CFOs often create 1 year and 3 year plans. CEOs sometimes create visions that look out 10 or even 25 years. As a strategic HR leader, you should contribute valuable perspectives on whether those plans are attainable from a people perspective — do you and your organization have the necessary skills, knowledge, people, culture, talent acquisition system, leadership, and more to deliver the desired outcomes that these executives are focused on? Are you making the investments you need to make now to have the capabilities you need in 1 year, 3 years, 5 years, and beyond?

Oftentimes, the CHRO is a confidant and informal coach to the CEO. Use these conversations to not only provide guidance and perspective on what is top of mind for the CEO,





but also to learn what's most important and urgent from their perspective. The CHRO should always be listening for opportunities for strategic HR investments, especially when talking directly with the CEO. Don't expect the CEO to always see the opportunity for addressing an issue with a strategic HR investment in your people and culture—that's why they are the CEO, not the CHRO.

Your CFO is an absolutely critical partner for you as an HR leader. Your CFO looks across your business and searches for better ways to invest in your organization's resources. You have expertise in how people, culture, and organizational design support or hinder those improved investments. Your CFO may see inefficiencies in organizational performance that require a strategic HR investment; for example, an underperforming marketing and sales organization may need more than the one-day offsite meeting your CMO and

CRO are planning. It may take a concerted series of investments in leadership, people management, and teamwork to reach an acceptable level of performance. It is worthwhile to talk with your CFO about how you can communicate the business value of your investments in a way that allows your asks to be compared most effectively and efficiently against asks from other executives in your organization.

Again, ensure that you are building momentum for your proposed investments with other members of the executive team through 1-on-1 conversations and partnerships focused on what's in it from them and their team. Come to budget and planning meetings prepared for the objections you might hear from your C-level colleagues.



## COMMON OBJECTIONS TO STRATEGIC HR INVESTMENTS

### (AND HOW TO RESPOND TO THEM)

Unfortunately, other executives often object to any HR initiative as not as important or strategic as some other investment. We've collected common objections that our customers have heard and addressed them there, along with some tips on how to respond.

#### **"HR IS ONLY ABOUT SOFT SKILLS. WE NEED HARD RESULTS."**

It's a misconception that HR doesn't lead to business results; after all, people create business results. That said, always, always, always tie your proposals back to accelerating growth, reducing risks or costs, and realizing vision, mission, and values. Quantify the impact whenever possible. Oftentimes, strategic HR investments can have a significant ROI with modest decreases in regrettable turnover or time-to-fill plus a modest productivity increase. Everything else such as increases in engagement and well-being can influence the business outcomes you want to achieve, but might be the people and culture icing on your CFO-endorsed business value cake.

#### **"WE DON'T HAVE ANY BUDGET TO INVEST IN THIS."**

Always, always, always tie your proposals back to accelerating growth, reducing risks or costs, and realizing vision, mission, and values. (Yes, you've read this before.)

Tie your strategic HR investments back to your organization's vision, mission, strategy, and objectives. Don't assume that others will make that connection without clarity from you and your team. Focus your efforts on the most important things your organization wants to accomplish and the most challenging obstacles in your way. You and your executive team don't have time to focus on anything else.

Also, work with your CFO early and often to clearly articulate the value of your strategic HR investments. Build allies with other executives focused on what's in it for them.

Note: Don't do things just because other organizations do them or because you did them somewhere else. Focus on what your current organization wants to accomplish and how you can get there faster, easier, and less expensively.

#### **"WE'RE IMPLEMENTING [XYZ SYSTEM OR NEW PROCESS], THE TEAM CAN'T HANDLE ANOTHER IMPLEMENTATION."**

Properly plan your strategic HR investments to avoid overlapping rollouts whenever possible. People throughout your whole organization are busy and don't have time for anything that doesn't make them more productive, save them time, or help them avoid headaches.

Ensure that you have an employee experience calendar to avoid launching new initiatives on top of other organizational needs such as closing out the last month of a quarter strong from a sales perspective.

Always focus your HR rollouts on what's in it for each of your stakeholders, with different messaging for the CEO, C-level leaders, people managers, and individual contributors.

If your challenge is related to the HR team's resources, lean into your partners and vendors. Most will have implementation services and customer success teams that can significantly reduce the burden on your team for a modest fee that increases the likelihood of a successful investment.



## **"I DON'T THINK OUR COMPANY CAN HANDLE CHANGE MANAGEMENT."**

Respond with: "Can we afford to keep operating as we are?" If your initiatives are focused on the most important things your organization wants to accomplish and where you are falling short, other leaders will see the need for change. The inverse of "people create the value in your organization" is that most problems are people problems that need to be solved by HR or with the support of HR.

While some people complain about change no matter what, most people complain about change management when the change seems unnecessary or not worth it. Make sure you communicate the reason behind the change with specific messaging about what's in it for them.

# Quick, Tactical Tips on Getting Executive Buy-In

Time to get down to business. In this section, we'll cover best practices that we have learned over years of partnering with strategic HR leaders to get their initiatives and strategies off the ground.

## **PARTNER WITH THEM.**

- Seek out partners for your various initiatives before you present them to a larger group.
- Focus on what's in it for them and their team. While most executives care about the larger organization, they rarely have time to truly focus their time, energy, and money on "greater good" initiatives because they have departmental objectives they are accountable for.
- Use these conversations to uncover what they want to accomplish and what's in their way, not just for this initiative but for future initiatives as well.

## **TAILOR YOUR PITCH TO EACH STAKEHOLDER DURING 1-ON-1 MEETINGS.**

- Build momentum and understand concerns before you present to the entire leadership team.
- Again, focus on what's in it for them and their team.
- Ask them for feedback.
- Ask what their biggest concerns are.
- Create clear agreements regarding what you need from them, describing who will do what by when.





## USE DATA TO TELL THE STORY.

- Don't rely on a single benchmark for building your business case. Combine at least a few for a better point of view. For example, a vendor focusing on reducing employee turnover is incentivized to share a high number regarding the cost of someone leaving an organization. Triangulate with a few sources.
- Build a realistic business case. Sometimes people can be tempted to create outrageous ROI numbers that will reduce credibility. Test your assumptions on a peer at another organization or someone you trust internally before you share with your CFO.
- Show your work. Your CEO and CFO will want to see step-by-step how you created your business case, including the assumptions you are relying upon and the sources you used for creating your benchmarks.

## ALIGN HR STRATEGY TO OVERALL BUSINESS GROWTH STRATEGY.

- Work with your CEO and CFO to understand what your organization's most important metrics and desired outcomes are, focusing on accelerating growth, reducing costs and risks, and realizing your vision, mission, and values.

- Make the connection between your proposed investments and what's most important for your organization. If it's not connected to what's most important, it's not strategic.

## THINK LIKE A MARKETER TO INSPIRE, MOTIVATE, AND PERSUADE YOUR C-LEVEL COLLEAGUES.

- Make sure your numbers and business case are in order, but include a compelling story that shows the growth and transformation your organization will experience. An excellent resource on this is Nancy Duarte and Patti Sanchez's *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols*.
- Test your presentation on your own team and peers within your HR network and community. Were they inspired?
- Connect with your CMO for help on ensuring your message is concise, polished, and motivating.

## BE UNAPOLOGETICALLY BOLD.

- Once you've put your business case together and the numbers are clear and compelling, advocate for your proposal with backbone and heart. Fortune favors bold CHROs.
- Some leadership teams say no to everything at first. Defend your perspective. Thank people for feedback and come back stronger with answers.



## SHARE PREVIOUS WINS AND LOSSES.

- Ensure that you share success stories and wins from your team in an ongoing way. Share stories such as a key employee that you saved or an internal partnership that helped achieve an important business outcome alongside metrics and quantitative data.
- Check in with your C-level collaborators and partners on a regular basis to understand their perspectives on what's going well and what can be improved about investments.
- Talk about challenges you encountered, how you overcame them, and what you learned. This not only normalizes humility on your leadership team, but also shows that you are looking objectively at your investment portfolio.

# Get Started on Making the Case for Strategic HR

As a strategic HR leader, what is the top challenge you are hoping to solve in your organization right now? Select one of the options below to access a ready-made yet customizable template that you can use to craft your pitch to other executives.

## SCENARIO 1:

### WE NEED TO UPLEVEL OUR MANAGERS

Ineffective managers are a common challenge for organizations of all shapes and sizes. Poor people management can impact employee engagement and productivity and lead to costly turnover. Prioritizing manager development is a huge opportunity to make an immediate impact and drive performance.

[GET THE TEMPLATE](#)

## SCENARIO 2:

### WE NEED TO GAIN CLARITY ON GOALS AND OBJECTIVES

Your people need more clarity and alignment on goals. If employees don't have a clear roadmap, they can't focus their efforts on what matters. Lack of goal clarity and organizational alignment can lead to missed business targets and low morale. Aligning every employee around what's most important and providing better visibility into top objectives is a huge opportunity to remove obstacles and inspire collaboration.

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### SCENARIO 3:

#### WE NEED TO REV UP OUR REVIEW PROCESS

Organizations with an unclear, unfair, or inconsistent review process struggle to engage and retain top talent. People need clear insight into how they're doing, and HR leaders need better tools to manage the review process. Investing in a robust, insights-driven performance management solution is a huge opportunity to streamline our talent management program and develop high-performing teams.

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### SCENARIO 4:

#### WE NEED TO SPARK EMPLOYEE ENGAGEMENT

Employee disengagement is a common problem for organizations today. It can be toxic to your company culture and leads to low morale, decreased productivity, and poor performance. Getting to the root of what's causing disengagement on your teams is a huge opportunity to take action and significantly impact productivity, decrease turnover, and improve the employee experience.

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# How 15Five Supports Strategic HR

Making the case for investing in strategic HR initiatives is always easier when you've got a holistic suite of products to cover your organization's needs that are proven to be effective.

That's where 15Five comes in. Our solutions offer a richly integrated, evidence-based approach to employee engagement and performance management, to drive performance from the inside out.

Whether you need support with employee engagement, performance reviews, goal setting, or manager training, 15Five has a solution for your organization's unique needs.

[Learn more](#) about what 15Five has to offer, and [sign up for a free trial](#) or [schedule a demo](#) today.



## About 15Five

Founded in 2011, 15Five equips HR leaders to play a strategic role in their company's growth. HR leaders use 15Five to combine engagement, performance, and OKRs on one platform so they can make insightful decisions and take strategic action. Unlike other 'command and control' performance systems, 15Five uses the latest in people science to turn managers and employees into self-driven owners of performance and engagement. To further the impact of talent on company growth, 15Five also provides education, coaching, and community for HR leaders, managers, and employees. HR leaders at over 3,200 companies, including Credit Karma, Spotify, and Pendo, rely on 15Five's software and services to make their talent a growth driver.

