

This chapter offers advice about ways to approach key audiences, get on their agendas, and make good use of opportunities to present your case. To do this effectively, you need to customize your basic message by focusing on selected elements of the case that you know interest or concern specific stakeholders. You also need to decide what medium and venue will best enhance the delivery and reception of your message.

Your aim now is to get your case on the agenda of all your audiences - whether they are agency executives, budget officers, elected officials, fellow professionals, community organizations, the media, or the public. By presenting your business case, you will educate stakeholders about your initiative and how it will improve services, administration, or quality of life. This is your opportunity to turn your business case into support - in the form of funding, staffing, advocacy, and energy - from various stakeholders.

You are probably very familiar with the decision processes, norms, and expectations of your own agency, which of course is your first audience. The techniques in this chapter will help you make a strong case in those internal processes. Often, you need to engage external audiences as well. We highlight some of them here and offer specific advice about working with them. A more detailed description of Audience and Presentation Skills can be found in Part Two beginning here.

Identifying the audiences for your business case

Understanding the political culture of your environment is important here. Your stakeholder analysis should have shown how political decisions are made, who is likely to make or influence them, and how to get access to the decision process. If the prevailing political culture puts a premium on public meetings, then a "knock-out" public presentation may be in order. If a crucial decision maker establishes a position on an issue by studying it herself, then you need time to talk with her. If she relies on staff to gather and assess information, then you need to find the person who plays this role and sell him on the issue. Here are some practical tips that will help you schedule your presentation with these other stakeholders.

Elected officials and policy staff

The schedule keeper is your key resource for setting up a meeting with an elected official or key policy advisor. Call to set up a meeting a week or two in advance. Be prepared for questions about what you'd like to talk about, the group you represent, and who would be attending the meeting with you. Once your meeting is set up, you may want to fax or e-mail a brief fact sheet and a list of people who will be attending.

While most constituents want to meet personally with the elected official, it's often just as important to meet with the policy advisor or budget staff member who works in your particular issue area. These individuals have the expertise and necessary access to advise the elected official on the best course of action. Often the appointed staff influences a policy maker's opinion on any given matter. Thus, your ability to shape the staff's views on a subject may matter much more than a brief face-to-face meeting with the elected official.

Plan for presenting your business case

Prepare a **separate** plan for **each** audience that answers all of the following questions:

- What are the key program and policy concerns of this audience?
- What related activities do they engage in today?
- Who should I call to set up a meeting or presentation?
- How much time will I have and what type of presentation should I prepare?
- What logistical preparations need to be done for this meeting or presentation?
- Who should I invite to the presentation/meeting? What role will each person play?
- What materials do I need to provide?
- How, when, and with whom should I follow up?

Professional staff

The support of other professionals who will interact with or be affected by a system is also needed. Their understanding and support for it is therefore essential. One way to formally present your case is at professional organization or union meetings. Sometimes staff meetings present a good opportunity. Many staff also receive publications from the various organizations to which they belong and these may be good outlets for presenting your case. This group is often overlooked or underappreciated and the consequences can be very severe. Be sure to cultivate and listen to their concerns.

Community organizations

When a new or changed system affects people at the community level, you should identify representative organizations and reach out to them. Contact the presidents or one of the leaders of the community organizations you wish to speak to, give them a brief overview of what your business case is about, and tell them you'd like to speak at one of their meetings. These groups can help you market your business case in the community by participating in events and building the grassroots network. Involve these groups on an ongoing basis - their support and encouragement will be needed throughout the project.

The news media

The most effective way to deliver your message to the widest possible public audience is through the news media. Generally, your agency's public information office is the conduit for this kind of communication. You can assist in this effort by helping to prepare press releases, op-ed articles, letters to the editor, and press conferences. In working with the press, anticipate the questions and problems they will raise. For example, "Why did you let this problem develop?" or "With all the things government should be doing, why should money be spent on this project?" Be ready to provide answers or solutions for each one.

Presenting your business case

Once you get on the agenda, do your homework. You know a lot about your own agency audiences and decision processes, but you may need to address others as well. By doing some research on the Internet, in the public library, by looking through a legislative directory, or reading newspaper clippings, you can find out a number of things about other audiences before you walk into a room to make your presentation. Your presentation should address the concerns that they may have with your policy area in general and with your IT initiative in particular.

If you are meeting with an elected official, you should know his political party, the committees he sits on, his occupation, and the governance structure in his district. If you are meeting with a specific government agency, you should have a good understanding of their day-to-day operations and what their role would be in the project. If you are presenting to a community organization, ask what types of projects the group has sponsored in the community and request a list of recent speakers. If you are trying to get your story picked up by a media outlet, you should have a good understanding of how they cover stories in your policy area and how they feel about spending on government IT projects.

Table 2 summarizes the kinds of presentations that are well suited to each kind of external audience.

Table 2: Presentation methods suitable for external target audiences	
Audiences	Preferred delivery methods
Elected officials and policy advisors	Presentations - address a legislative committee or a group of elected officials Meetings - elected officials and/or their staff members may prefer to meet in their office or a conference room; the meeting is likely to be short
Related professionals	Presentations - at regularly scheduled meetings of professional organizations, associations, unions Newsletter articles - written for inclusion in regular professional publications Informal networks - actively encourage your staff to talk about the project with their colleagues
Community groups	Presentations - at their regularly scheduled membership meetings Informal networks - actively encourage community group members to talk to family, friends, and community residents about the benefits of the project
Local and regional news media	Press conferences - creating newsworthy events for your project Press releases - announcing newsworthy events Op/Ed (opinion/editorial) articles - enlisting community leaders to write articles that appeal for public support for your initiative Letters to the editor - clear and brief letters highlighting key points of the business case

Presentation meetings.

Most often the venue will be a meeting. When planning the meeting be sure you know who will participate, who

will speak, what they will say, what you want to accomplish, what specific actions or decisions you want from the official, and any other important issues. Create and send out an agenda to all participants, and plan to arrive at the meeting place with enough time to set up and become familiar with the meeting room. Be sure to brief all those who are attending the meeting with you about their roles and what you expect them to do. Assume you will only have a few minutes to present your case. It is important to give a brief overview of your case, highlighting the problems, solutions, and benefits associated with the initiative. The details of your case - the perceived risks and the nuts and bolts of your initiative - should be included in the printed materials you leave behind. Be prepared to answer those questions in case they come up during your presentation. Have someone in your group record the comments and questions raised, and the main points of the discussion.

Leave a brief, well-organized information packet behind. Include such items as news stories and editorials, a cost/benefit analysis, and proposed legislation or memorandums of support. And be sure to send a letter of thanks in which you briefly restate the issue and relate any progress that has been made since your meeting. Give a name and telephone number to call for any questions or additional information.

Computer-enhanced presentations

In certain venues, you may want to present your case using presentation software. Regardless of the technology you use, keep your presentation simple and direct and focused on the concerns of your specific audience. It helps to have an outline from

which to build your slides. One general rule to follow when creating your slides: less is more. Screens crowded with words or special effects are difficult to read. Stick with one typeface, or two at the most. Make your key points with simple, short bullets. Be sure to test the computer and projection equipment carefully, at the presentation site if possible. Always have either backup equipment or alternative media (such as overheads) available.

Op-ed articles and letters to the editor

Local newspapers often provide space for community leaders to voice their opinions on topics. An op-ed piece provides an avenue to clearly present an argument for a particular project and backs it up with facts. An op-ed piece will be most effective coming from a recognized leader in the community. A published op-ed piece is a good addition to the press packets and printed materials you use as you continue to market your business case.

Letters to the editor can help increase awareness of your project and keep it fresh in readers' minds. Letters to the editor should be brief, and they should cover the main themes of your message that need to be repeated often to take hold with the public.

Press releases

Newsrooms receive dozens of press releases every day, so reserve these for newsworthy events and limit them to one or two pages. A press release can be used to announce key milestones in your effort, such as the support of a new champion, the introduction of legislation, the receipt of funding, or the implementation of the project. Press releases should include the details - the who, what, where, when, why, and how - of your story and a contact name and number for reporters to call if they have questions.

Articles for specialty publications

Publications like professional association newsletters provide a captive audience for your business case. These publications look for articles on current events affecting their members. Contact the editors and offer to write a short article for inclusion in their next issue.

Be prepared for all kinds of questions

One good way to know that you are fully prepared to present your case is to ask yourself questions you think your audience will ask. Put yourself in their places and look for gaps, mistakes, confusion, past experiences, and points of view that could lead to questions about your idea and its feasibility. Table 3 lists some common questions

Table 3. Frequently Asked Questions

Experienced professionals, elected officials, and public policy leaders say you can expect any of the following questions when you present your business case. Can you answer them?

Chapter 4. Presenting your business case

- What is this about?
- Why is it important?
- What are the risks?
- What are the benefits?
- How will this improve services?
- What exactly is the problem? How can it be resolved?
- What are the long-term vision and goals?
- What is the time frame for completing the project?
- How long will it take to see results?
- Can you define the scope of the project?
- What are your milestones for showing progress?
- Whose bureaucratic empire is being built by this initiative?
- Who will manage this initiative and how?
- Who else supports this initiative and why?
- Who is against it and why?
- Are all the participants on board?
- Where have projects like this one been successful?
- Does legislation need to be written to accomplish the goal?
- Can you specify the policy hurdles?
- What levels of government will it affect and how?
- In view of data privacy laws and issues, how much and what kind of information should/can be shared?
- What do the relevant elected officials think about this initiative?
- Where does this project fit in with the Governor's/ Mayor's/ County Executive's policy agenda?
- Have you been to see the Legislature / City Council yet?
- What role will your agency head play in this initiative?
- What are the opinions of other agencies, constituencies, employees, and unions?
- How much will it cost and where will the money come from?
- Didn't we [your audience] fund this already?
- What about the millions of dollars we've already invested in this program in the past several years?
- What other funding is available? How are you pursuing it?
- What is the Total Cost of Ownership (TCO)? (building, maintaining, training, etc.)
- What will be the Return on Investment (ROI)?
- What are the true total costs?
- Is there a way to share the costs?
- What do you want me [your audience] to do?
- How will this project help achieve other policy goals that I [your audience] care about?