

## Quick Guide: Get Exec Buy-in for Corporate Philanthropy Software

Investing in one complete system to house your corporate philanthropy initiatives is something you've been dreaming of for quite some time. After witnessing low employee participation rates in various programs you're managing coupled with the overall low engagement levels running rampant through your office, you know it's time to look beyond the manual process you either created or the system that was handed down to you. The problem is... how do you get your boss on board?

Earning the executive team's ear can seem nearly impossible, especially when the company seems to be doing more budget trimming than spending lately. However, with the right approach, you can make a successful pitch to get approval for CSR software. Here's how:

### Step 1: Evaluate external departments to identify organizational challenges.

You may already be aware that corporate philanthropy programs increase employee engagement, morale and strengthen coworker relationships, but do you know how they can specifically benefit your organization? Providing generic proof points to an executive team won't do you any good. They need to visualize how your IT department is going to improve their internal training program and succession planning initiatives with skills-based volunteering. In fact, according to the America's Charities [2015 Snapshot report](#), 25% of companies already tie skills-based volunteering to an employee's professional development plan and 21% plan to do this in the future.



#### To Do:

Probe upper management closest to executives to find out what they see as your organizational challenges. Even if this information isn't readily available, it doesn't mean it's non-existent. Turn to HR department leads who have access or the ability to survey exiting employees. For the next step, be on the lookout for a specific person who is passionate about identifying or solving these challenges. You'll need to recruit them later to be your "exec buy-in coach".

#### Example:

Organizational Challenge: There's a general sense that employees leave the company because there is no room for growth.

Outcome with CSR Software: Skills-based volunteering programs can be easily facilitated and engage employees cross-departmentally to break down silos and foster a learning culture.

Potential Intangible Benefits: The employee sees how their skills can grow outside of the organization and internally.

Potential Tangible Benefits: The employee sees how their skills can grow outside of the organization and internally.

## Step 2: Find your coach.

Your coach does not exist. You have to find him or her and develop them into one. This dates back to the buying influences in every organization. These people will be your key decision makers when it comes to the decision of purchasing the software. The four main buying influences [according to Miller Heiman](#), a renowned sales team instructor, are the Economic Buying Influence, User Buying Influence, Technical Buying Influence and the Coach.



### To Do:

Look for a coach during the first step of this process that:

- Has credibility and is well-respected by higher ups
- Is a confident and knowledgeable leader in their department
- Is passionate about solving the challenges with CSR software

Multiple coaches may emerge, and that's okay. You just need to find the middle man that can give you the right perspective in pitching to your exec team. If you think this process doesn't apply to you, think back to a time where you were certain you'd get approval for something but didn't. It's probably because you came in with the wrong angle, and that's the insight you need from a coach.

## Step 3: Gather internal evidence.

After identifying the challenges within your organization and how [corporate philanthropy software](#) or [grants management software](#) works to improve them, you'll need to transform facets of this decision into data points. For starters, you'll want to go back to those problematic components of the organization and conduct feedback surveys to cull data to be used in your pitch.

Providing specific examples with data points solely related to the departments, teams and people within your office walls will grab their attention. It will show you've done your research, have a pulse on the needs of the organization and are able to propose realistic solutions to solve organizational challenges.

### Example:

Specific Data: 46% of employees in exit interviews have left the company because they stated there was a lack of opportunities for growth.



**Turn those examples from step 2 into data-backed examples.**

## Step 4: Come prepared to the pitch with proposed vendors.

However, do not bombard your execs with too much information. When researching vendors, make sure to determine if the vendors in question have:

- Enhanced Configuration Tools
- Value Added Services
- Rich Repositories of Charities

Also, make sure that the vendors in question are:

- Modern & Easy to Use
- Transcend Global Barriers
- Integrative & Leverage Data



**Get the full list and learn what to look for:  
7 Qualities an Outsourced Corporate Philanthropy Vendor Should Have.**

### To Do:

Explain how the software will integrate with other systems and processes already in place.

---

Demonstrate how the software improves other systems and processes already in place.

---

Provide testimonial support from your coach/coaches.

“

---

---

”

How has CSR software assisted other companies similar to yours:

Company Name: \_\_\_\_\_

CSR System Vendor: \_\_\_\_\_

How Long They've Used It: \_\_\_\_\_

How Much They're Spending: \_\_\_\_\_

How It Has Impacted Their Day-to-Day: \_\_\_\_\_

How It Has Impacted Their Long-Term: \_\_\_\_\_

## Step 5: Proof points to share with execs.

- Excel spreadsheets and home-built solutions are quickly becoming passe because employees, especially Millennials (which will be 50% of the workforce in 4 short years), are looking for a seamless experience between personal and professional systems. Think of services and tools like eBay, Amazon, Dropbox and Evernote. You can't get your employees on board and expect them to use clunky, outdated software can you?
- [Corporate philanthropy programs](#) alone can increase employee engagement by almost 8%, increase productivity by 13% and reduce turnover by up to 50%! Those numbers will soar with a seamless, beautifully designed and easy-to-use strategic philanthropy software.
- From social media integration to mobile accessibility, CSR software covers all the bases. Now YOU can focus on getting your employees excited about the new philanthropy plan and your system can make sure you have the tech infrastructure to do it.
- Do you have people internally who understand how those who understand how philanthropic programs are designed? Do you know what the best practices are around MG policies are? Do you have experience running these charitable giving, volunteerism and corporate philanthropy programs from start to success? If the answer is no, then you can't afford to keep this in-house, as you'll be setting yourself up for failure..

## Notes: