

How to Get Your Idea Approved

by Amy Gallo

NOVEMBER 15, 2010

When you have an idea, proposal, or recommendation that you believe in, it's easy to presume that getting it approved will be a breeze. If you see how great the idea is, won't everyone else? However, whether an audience accepts an idea is often less about the idea itself than about how you present it. When you need approval, don't assume that just because it's brilliant, others will see it that way – convince them.

What the Experts Say

When it comes to getting approval, style can be as important as substance. “Words matter,” says John P. Kotter, Chief Innovation Officer at Kotter International, and a professor emeritus at Harvard Business School, whose latest book is *Buy-in: Saving Your Good Idea from Getting Shot Down*. And many times, all you get is one chance in front of your boss, the Executive Committee, or whatever group will decide your idea's fate. “Initial impressions are very strong and they can be hard to counteract,” says Michael I. Norton, an Associate Professor of Business Administration at the Harvard Business School. It's not about shoving the idea and its numerous merits down your audience's throat. Think about how you can carefully usher your idea through the approval process. “The bigger the stakes, the more it's worth taking the time to get it right,” says Kotter. Here are five ways you can give your proposal a fighting chance.

Form alliances early

Before you present an idea or request resources or approval, it's a good idea to test it with those responsible for giving the green light. “Sometimes it doesn't hurt to talk around a little and see what lights people's eyes up and what makes them cloud over,” says Kotter. This can also surface

questions or comments early in the process. Once you've tested the waters, you can set up more formal meetings with key stakeholders to ask for their support. These meetings serve three purposes:

- They build the necessary buy-in for your idea.
- They demonstrate to your stakeholders that you're interested in their opinions.
- They help you improve and expand on your idea – it's possible that these stakeholders will see something in your idea that you didn't.

The more you understand your audience's feelings about your proposal, the better you can prepare to get it approved.

Prepare, prepare, prepare

How you respond to questions and concerns will play a large role in your success or failure.

“Primarily, when you watch someone stumble through an answer, you make an inference that they don't know what they're talking about,” says Norton. Display confidence so people trust that your recommendation is a good one. Before you go into your presentation, think through what possible concerns your audience may have. In *Buy-In*, Kotter and co-author Lorne Whitehead lay out the four basic strategies people most often use to shoot down an idea:

- Putting off the decision so it's essentially delayed to death
- Creating confusion by barraging you with questions or unnecessary detail
- Stirring up irrational anxieties or fears
- Attacking you personally

Rather than avoiding these attacks, Kotter and Whitehead suggest “letting the lions in” to critique your idea. Don't marginalize the people who will pull apart your idea. Instead, develop concise, honest responses to each of the tactics they may use. By doing this in advance, you build your self-confidence and can avoid getting anxious or mad when people challenge your idea.

Position it for your audience

“You absolutely want to tailor the specifics of your presentation to your audience,” says Norton.

How does your idea benefit them? They may stand to gain prestige, cost savings, or an opportunity

to build their legacy around your idea. Shape your presentation so that it speaks directly to those benefits and the ways that your audience will reap them. By doing this, Kotter says, you create a positive mindset around accepting your idea or proposal.

Keep it simple

“The curse of a presentation is that you know much more than your audience about the topic,” says Norton. Focus on one or two main points and avoid getting hung up on trying to prove how much you know. Be judicious in how much data and analysis you present. Overly detailed presentations can distract your audience, making them feel stupid for not following along. Also, they can cause you to simply run out of time. Even if your audience asks for more detail, be sparing. Here, Kotter points out that one of the tactics that people use to kill an idea is to present distracting information or request so many specifics that others get confused.

Answer questions with confidence

When you present a new idea, “People will have all sorts of reactions and will want to discuss those reactions,” says Norton. Many presenters get distracted by trying to discern the intention behind questions or comments. *Is he trying to throw me off? Does he hate the idea? Does she not trust my judgment?* Don’t bother with trying to uncover motivations. Focus on answering the question as simply and straightforwardly as possible. No matter how aggressive, demeaning, or seemingly silly the question may seem, “You want to come off as a statesman,” says Kotter. “Treat him like a reasonable person with a reasonable question.”

If you get a question that is off-topic or potentially derailing, you can answer the question you wished the person asked instead. In a recent whitepaper “The Artful Dodger: Answering the Wrong Question the Right Way,” Norton and his co-author Todd Rogers found that people who “artfully dodge” questions are trusted more than those who respond directly to questions in a less elegant way. “If we know someone is dodging the question, we don’t like it. But we very, very often don’t notice it,” says Norton. You can give an answer that is vaguely related to the question but that confidently returns your audience back to your main point.

Principles to Remember

Do:

- Meet with important stakeholders in advance of needing their formal approval
- Position your idea in terms of the benefits your audience stands to gain
- Answer questions concisely and confidently

Don't:

- Assume that your audience will believe it's a good idea just because you do
- Overwhelm your audience with detailed analysis or specifics
- Get defensive or angry when people challenge your idea

Case Study #1: Build and leverage alliances

Amy Vezzetti was working for a global pharmaceutical company when she took on the role of senior manager of HR for the Asia Region. Each of the countries in the region had their own HR team, but before she and her boss re-located to Hong Kong, there had been little coordination between them. In the first few months of her new role, Amy saw an opportunity to implement a regional approach to 360-degree reviews based on a homegrown solution from Australia. It was affordable, especially in comparison with the off-the-shelf products that some countries were using, and using one system would give global HR access to regional data about performance and evaluation. Amy quickly convinced her boss that it was worth pursuing.

Her next step was to get approval from the individual countries. "We needed to know that all the HR teams were on board," she said. She met with them individually to present the case. Before the meetings, "we thought through: what is the likely resistance and how can we show them the benefits to their organization, their employees and to the company," said Amy. They then held a region-wide meeting where they presented the formal business case to the country HR managers. "We got sign off because we had already done the alliance building," she said. But getting their buy-in was only half the battle. They still needed the go-ahead from leadership to fund the project, which required approval from the regional president and all of the individual country managers. She started by casually bringing it up with the regional president. "He wasn't against it but I didn't think 'Great, this is going to be easy,'" said Amy.

Amy and her team enlisted the help of the HR directors in each country and asked them to meet with their country managers to review the business case. These meetings helped to get the country managers on board, but also generated useful feedback that they used to adjust the product. They

then took the proposal to the regional president and positioned it as a cost-efficient opportunity to support his goals. For example, one of his strategies was to develop the capacity to move talent across the region, and Amy and her team explained how having consistent data would enable that. After hearing the case, he was very supportive and agreed to fund it. The new system was rolled out region wide the following year.

Case Study #2: “Consistent persistence”

In 2007, Matt Rady, the Head of Banking and Financial Service in North America for Macquarie, a global provider of banking, financial, advisory, investment, and funds management services, had a breakthrough idea. At the time he was the head of Macquarie Global Investments and responsible for sourcing and developing new products. He and his team had come up with the idea of expanding their footprint into agriculture. They knew there was strong global demand for food, and a growing rate of protein consumption in Asia. But Macquarie had played in relatively traditional markets and he knew he would have a tough time convincing leadership there was money to be made from buying farms and fattening cattle. Still, he felt the proposition had promise and set about proving its worth.

Matt started off by presenting the proposition to his boss. “He was highly skeptical but we didn’t get a blatant ‘no,’” Matt said. Without his boss’s wholehearted approval, Matt knew he would need a champion within the organization to help them push the idea through. They decided to go to his boss’s boss because they believed their proposition was in line with the culture he was trying to build. He had recently told his organization that they should be pursuing BHAGs (big, hairy, audacious goals) and Matt felt the proposition qualified. “We didn’t want to circumvent line management or go behind my boss’s back, so we said, ‘Give us an opportunity to pitch the idea to both of you,’” said Matt. This pitch was not to get full approval; rather they needed resources to prove out the concept. They got them.

“We knew there would be other skeptics,” Matt said, so they began to gather allies trusted in the organization. In particular, they brought in two retired executives who believed in their idea and who could lend credibility to the proposition. Prior to going to the bank’s executive committee to ask for final approval, they thought through the concerns the committee might have: Would they question whether there would be enough investor demand? Or would they doubt that the company

had the right internal capacity? They tailored the pitch based on the issues they thought the committee would find most worrisome. “It’s about being prepared for the unexpected questions,” said Matt.

Matt and his team succeeded: the executive committee approved the proposition and the product was launched in 2008. The whole process took 18 months. Matt says that they never got to the point that they thought they should throw in the towel but “we did see that it would be a long road to glory.” He described their approach as “consistent persistence.” The fund is the second largest producer of cattle in Australia, has raised over \$750 million globally, and has subsequently spawned other initiatives at Macquarie.



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