

From Pitch to Priority: Cracking the Code on Executive Buy-In for Workforce Innovation



Presented by:



PROOF OF CONCEPT

LOVE THE PROBLEM

Executive Summary

Workforce innovation often gets stuck in the “pitch” stage. Leaders propose meaningful change: smarter processes, more agile talent strategies, better engagement models. But those ideas stall before becoming funded priorities. Why? Because traditional business cases focus on *justification*, not *influence*.

Over a five-day, collaborative sprint led by Proof of Concept, 12 cross-functional leaders explored this critical challenge. Their shared goal: create a new, adaptable model that helps good ideas become actionable investments. The outcome was a practical, insight-driven framework that blends business case rigor with adaptive stakeholder influence.

Introduction

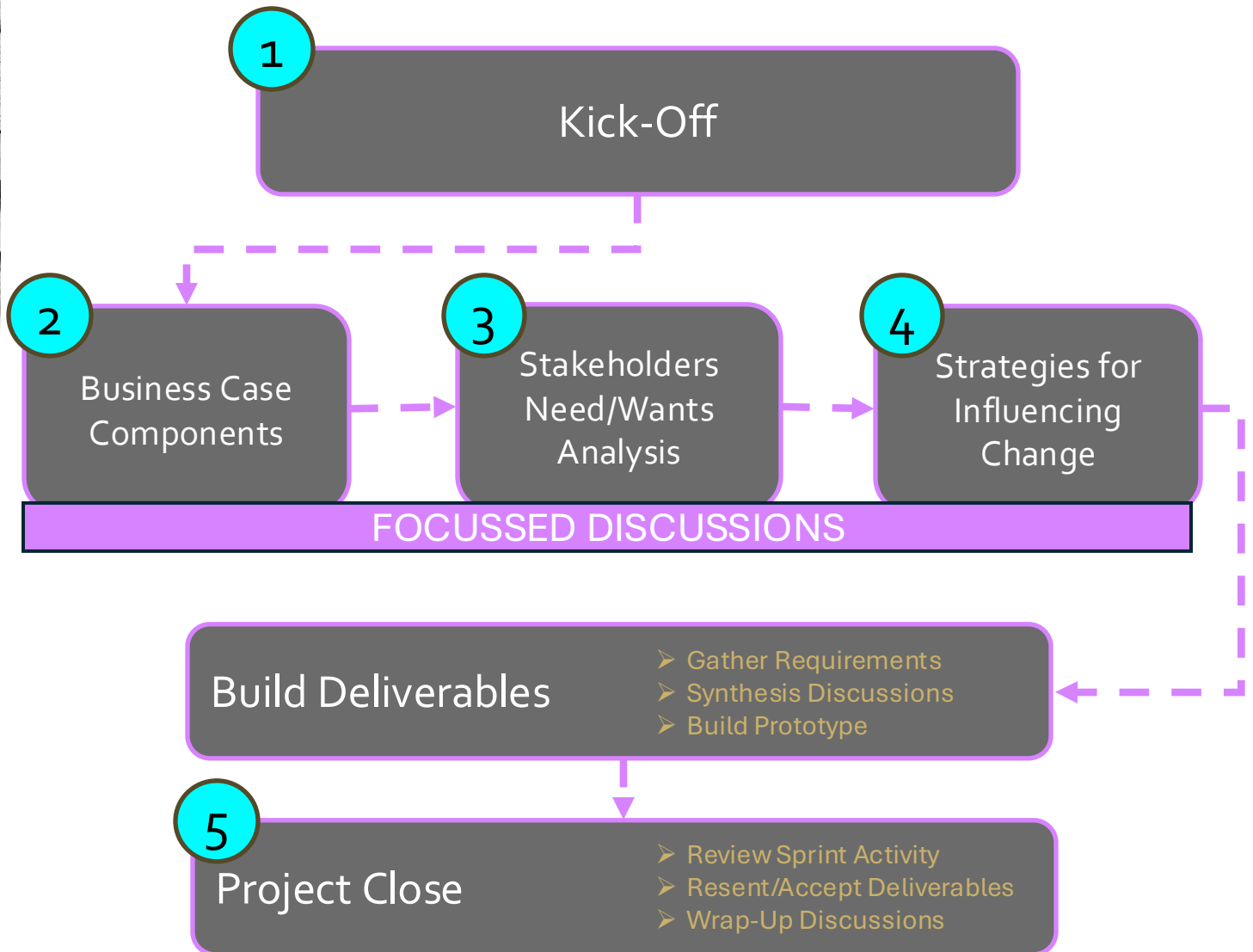
At most organizations, the business case is treated as a compliance formality. A static artifact filled with boilerplate language. But the most effective business cases act more like strategic narratives: they align with goals, acknowledge risks, and account for human behavior.

Throughout the sprint, participants challenged norms and co-created a new kind of business case backed by data, but, designed to resonate. What emerged was not just a process, but a new tool that dynamically supports proposal creation and stakeholder alignment.



Sprint Format & Methodology

The sprint ran one week, combining structured discussion, expert facilitation, and industry leaders with diverse perspectives and best practices. The goal was to move from shared problem definition to deliverable launch in just one week.



Participant Snapshot

Participants included enterprise HR and procurement leaders, IT program managers, contingent workforce practitioners, and industry SMEs representing strategy, delivery, operations, and enablement functions.

Time Commitment

Roughly 5 hours of live virtual sessions, supported by targeted follow-ups and collaborative inputs between meetings.



The Problem Statement

Despite clear business need, many strategic workforce ideas get stuck. They never make it out of proposal mode. Not because they're flawed, but because they fail to connect.

"We keep building great decks, but we still lose the room. Something's missing."

Refined Problem Statement

While organizations are increasingly expected to justify workforce-related investments through business cases, many of these cases fail to resonate with executives, not because the logic is weak, but because they lack emotional resonance, strategic framing, or stakeholder alignment. This creates a gap between good ideas and actionable decisions, particularly in the context of workforce transformation and innovation.

Key Sprint Discoveries

- Decision-makers don't reject logic, they reject risk, ambiguity, or lack of alignment
- Business cases often fail to account for stakeholder personality or organizational politics
- Templates don't evolve as the audience does—most are rigid, outdated, or ignore human influence

Working Hypothesis

To crack the code on buy-in, we need to move beyond documentation and toward design by designing business cases as strategic assets that integrate influence, narrative, and decision logic.



Key Insights from the Sprint

Influence Is Not a Soft Skill, It's a Design Feature



A well-built business case doesn't just inform, it moves people. Participants emphasized that the real shift is not from "no" to "yes," but from uncertainty to belief. This means the structure of your case must include deliberate influence levers: emotional framing, stakeholder alignment, risk fluency, and strategic timing.

Doing Nothing is a Compelling Option to Include



The default choice for many executives is not "No". It's "Not now." By explicitly defining the cost or consequence of inaction, the business case reframes delay as risk. Effective examples included deferred benefits, compounding cost of inefficiency, and reputational exposure.

Multiple Scope Paths Build Momentum



A binary proposal (yes/no) increases rejection risk. Instead, show phased options—start small, test fast, scale up. This builds psychological safety for the buyer and increases flexibility in funding and approval cycles.



Value = More Than ROI



Sprint discussions affirmed that ROI still matters but so do less tangible benefits like employee experience, brand trust, risk prevention, and data reliability. Crafting a compelling case means expanding the definition of value and tailoring it to what your audience truly cares about.

Framing Risk Is a Trust-Building Exercise



Glossing over risk erodes credibility. Acknowledging risks and proactively offering mitigations positions the proposer as realistic and prepared. It also reassures decision-makers that the team understands operational realities.

People Don't Read Business Cases—They Read the Room



Influence doesn't stop at the document. Many decisions are made in side conversations, email threads, or leadership huddles. The most effective proposals are those that activate champions, pre-wire support, and map stakeholder influence before the "formal" pitch.

Readiness Signals Matter More Than Vision Alone



A visionary pitch without a plan is a red flag. Teams that included delivery milestones, ownership clarity, and integration pathways were seen as more trustworthy, regardless of idea complexity.





Core Business Case Components

When you set out to design your business case, remember that each section must perform strategic work, it's not merely about filling space. Every component, from your executive summary to your financial projections, should actively contribute to convincing your audience of the project's value and viability. Below are the enhanced elements of a compelling business case, accompanied by detailed guidance for making each one resonate powerfully with your stakeholders.

Executive Summary & Title

Your title and summary should do more than label the idea. They should compel action. The best executive summaries answer four unspoken questions: Your title and summary should do more than simply label the idea. They should compel immediate action. The most effective executive summaries are meticulously crafted to answer four crucial, yet often unspoken, questions that an executive will have:

- ✓ What is this about?
- ✓ Why now?
- ✓ What's at risk?
- ✓ What do you want from me?

When drafting your executive summary, keep it under 150 words, make the ask clear, avoid technical jargon and use language that reflects urgency, opportunity, or consequence.



Problem Definition

Ground the proposal in tangible realities. Articulate the problem using language that conveys genuine pain, inherent risk, or lost opportunity, rather than simply focusing on process inefficiencies.

Where possible, incorporate:

- ✓ A data point to prove the problem exists
- ✓ A quote or example that humanizes the issue
- ✓ A future-facing statement that highlights impact

Current State vs. Desired State

One of the most potent persuasion tools at your disposal is the strategic use of contrast. By starkly showcasing the disparity between the current situation (the "today's reality") and the envisioned future (the "future vision"), you can create a compelling argument for change. This approach helps your audience clearly understand the problem and, more importantly, see the tangible benefits of adopting your solution or embracing your proposed direction.

A Crucial Pro Tip: Attainability Over Aspiration

Avoid over-idealizing the desired state; it must feel attainable, not just aspirational. Focus on realistic, measurable improvements and concrete steps to maintain credibility and audience engagement. An achievable future is more motivating than a fantasy.

Scope Options

Defining the scope of a business case means clearly outlining the boundaries of the proposed initiative; what is included, what is excluded, and the scale of change being proposed. A well-defined scope ensures stakeholders understand the effort required, the intended outcomes, and the limits of responsibility, helping manage expectations, contain risk, and create alignment across teams. It should also present multiple implementation paths to give decision-makers flexibility in commitment and funding.

- Do Nothing: Highlight the cost or risk of inaction.
- MVP / Pilot: Define a lean path to proof-of-concept.
- Full Build: Outline the complete vision, including resourcing needs.

This gives stakeholders flexibility and promotes low-risk entry points into bold ideas.



Cost Breakdown

A clear cost breakdown in a business case provides a transparent and comprehensive view of the financial investment required to build, implement, and sustain the proposed initiative. It should differentiate between one-time build costs and ongoing maintenance expenses, and include all relevant elements such as resources, technology, support, training, and change management. A thoughtful cost breakdown not only supports budgeting and planning, it builds trust by demonstrating diligence, foresight, and accountability.

Structure your cost model into:

- Build (Capital): Initial Costs
 - Infrastructure/tools
 - Resources
 - Time
 - Partners (advisory/consulting/change management/implementation)
 - Technology
- Maintain (Expense): Ongoing Costs
 - Licenses
 - Resources
 - Support
 - Enablement
 - Maintenance

Make sure costs are presented with confidence, and define any assumptions clearly.

Risk Assessment

A strong risk assessment in a business case identifies potential obstacles that could impact success ranging from operational delays and adoption challenges to compliance, financial, or reputational risks. More than just listing what could go wrong, it should demonstrate a proactive mindset by outlining mitigation strategies, contingency plans, and ownership for risk management. By openly addressing uncertainty, a risk assessment builds confidence in the proposal's feasibility and shows that the team is prepared, not just optimistic.

Use a matrix or categorized table to identify:

- Operational risks (delivery failure, resourcing gaps)
- Reputational/legal risks
- Adoption risks (stakeholder resistance, low engagement)
- Financial risks (overruns, low returns)
- Include mitigation strategies and accountability plans.



Value Articulation

Value articulation is the heart of a persuasive business case. It connects the proposal to what matters most to the organization. It goes beyond financial return to include strategic alignment, improved user experience, risk reduction, operational efficiency, and long-term capability building. Effective value articulation speaks in the language of the audience, ties directly to company goals or OKRs, and clearly shows how the investment delivers measurable impact. The goal is not just to prove it's worth the cost, but to show why it's worth prioritizing.

Don't rely on ROI alone. Include:

- Strategic alignment: How it ladders up to OKRs
- Quality improvements: Reduced friction or increased performance
- Experience: Measurable gains in satisfaction or usability
- Risk mitigation: "This will prevent X from happening..."

A compelling value case blends quantitative and qualitative measures.



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Influence by Design – Beyond the Business Case

A compelling business case may get a meeting. But a strategically influenced stakeholder? That's what gets the green light. Influencing change requires more than logic.

It requires empathy, strategic framing, and a deep understanding of the person on the other side of the table. No matter how strong your proposal is, it lives or dies based on how it's received and how it's perceived.

Too often, we treat stakeholders as if they're spreadsheets; flat, consistent, rational. But decision-makers are complex. They're motivated by goals, fears, power, timing, and personality. The most effective proposals don't just speak to an organization, they speak to people.

From Persuasion to Personalization

During the sprint, the group emphasized that business cases must evolve from one-size-fits-all logic to custom influence strategies tailored to who you're trying to move. That starts by asking a few key questions:

- What does this person care most about; risk, value, vision, reputation?
- What's their personality and decision-making style?
- Where are they positioned politically or operationally?
- Are they looking to lead change or protect stability?
- How will they evaluate readiness, risk, or return?

When you know who you're speaking to, you can better align not only the content of your business case, but the approach, tone, timing, and supporting cast you bring with it.

“Influence isn't manipulation. It's empathy with strategy.”



Common Decision-Maker Archetypes

Decision-makers are not uniform. They bring distinct motivations, fears, leadership styles, and lenses to how they interpret proposals. Understanding these differences is critical to influencing not just what gets decided, but how, when, and by whom.

This section introduces common decision-maker archetypes—personality-informed profiles that help predict how stakeholders are likely to respond to a proposal. By identifying which archetype you're engaging, you can tailor your communication style, emphasize the most relevant aspects of the business case, and anticipate the concerns or triggers that could block momentum.

Influencing change starts with empathy. These archetypes are tools to help you design your case for the person, not just the process.

Throughout the sprint, we surfaced six common archetypes that show up across companies. Each one requires a unique influence strategy.

VISIONARY

MOTIVATED BY: Future-state thinking, market leadership, transformation

HOW TO INFLUENCE:

- Paint a bold picture of what could be
- Use trends and external stories as leverage
- Make them co-authors of the future

CULTURAL ARCHITECT

MOTIVATED BY: Purpose, inclusion, impact on people

HOW TO INFLUENCE:

- Highlight human impact & organizational values
- Share employee feedback & engagement insight
- Frame the proposal as culture-enhancing

ROI SEEKER

MOTIVATED BY: Financial returns, measurable outcomes, optimization

HOW TO INFLUENCE:

- Lead with numbers and time-to-value
- De-risk assumptions with data
- Offer phased investment plans

POLITICAL NAVIGATOR

MOTIVATED BY: Influence, internal alignment, perception

HOW TO INFLUENCE:

- Build a visible coalition
- Help them champion the change
- Frame the case as politically smart

RISK MANAGER

MOTIVATED BY: Stability, compliance, control

HOW TO INFLUENCE:

- Acknowledge risks early & don't avoid them
- Offer control points and fallback plans
- Show how the plan minimizes uncertainty

OPERATIONAL REALIST

MOTIVATED BY: Feasibility, resourcing, and execution clarity

HOW TO INFLUENCE:

- Provide a detailed delivery roadmap
- Clarify dependencies & ownership
- Emphasize operational simplicity & readiness



The Deliverable: An AI-Powered Business Case Builder

At the conclusion of the sprint, the team introduced a tangible solution that brought our collective insights to life... An AI-powered business case builder designed to help workforce leaders move from idea to investment with greater clarity, speed, and influence.

The tool reflects everything learned during the sprint: the importance of aligning with stakeholder motivations, structuring clear and credible business logic, and embedding influence strategy into every stage of the case development process. Rather than just producing static templates, this tool offers dynamic guidance to help users shape their proposal in real time, customized to their idea, audience, and organizational context.

It was built not just as a product, but as a strategic companion supporting leaders who are navigating change, facing resistance, or trying to make a case for bold, often nontraditional innovation. By merging structure with strategy, the deliverable bridges the gap between intention and approval.

How it Works...

Users input a concept (in plain language), and the tool returns:

- ✓ Executive summary & problem statement framing
- ✓ Current vs. desired state articulation
- ✓ Phased scope recommendations
- ✓ Cost/benefit logic and risk overview
- ✓ Stakeholder influence plan with adaptive messaging

What Makes it Unique...

- **Persona-Based Influence:**
Generates messaging and engagement tactics based on stakeholder archetypes
- **Phased Buy-In Options:**
Presents MVP, pilot, and full-build paths to lower resistance
- **Implementation Readiness Prompts:**
Ensures teams think through change management, ownership, and delivery confidence



Our Biggest Learning

Influence is not a follow-up to a business case, it's the foundation of one.

Across every conversation, it became clear that the strength of an idea alone is rarely what gets it approved. What actually moves stakeholders to action is how well the business case is designed to resonate with the people who need to say yes. Influence must be embedded from the very beginning through personalized framing, strategic alignment, risk fluency, and deep understanding of decision-maker motivations. Without it, even the best business case risks falling flat. With it, even complex, unconventional ideas gain traction and momentum.

Call to Action: From Pitch to Priority Starts With You

Every day, bold ideas stall. Not because they're wrong, but because they weren't framed, delivered, or supported in a way that moved the people who mattered. That's a gap we can no longer afford to ignore.

The challenge isn't just building better business cases. It's reimagining what business cases are for. They're not paperwork. They're not hurdles. They're launchpads for trust, alignment, and action.

What You Can Do Now:

- **Shift your mindset:** Stop thinking of the business case as the end of the process. It's the beginning of influence.
- **Start with empathy:** Map the people who will say yes, hesitate, or resist. Ask what they value, and design for them.
- **Use the tools:** Apply the structure, strategies, and archetypes surfaced in this sprint. Don't just document, design to persuade.
- **Bring others in:** The strongest cases are co-authored. Build your coalition early, test your framing, and show momentum before you hit "send."



Authors & Collaborators

Paden, Chris
Collaboration Architect, Proof of Concept

Buma, Alison
Collaboration Architect, Proof of Concept

Kresge, Cara
Collaborator, Proof of Concept

Beckwith, Michael
Collaborator

Dinsmore, Kimberly
Collaborator

Fierro-Randazzo, Todd
Collaborator

Parnell, Lizzie
Collaborator

Penrod, Cathy
Collaborator

Abere, Geoff
Collaborator

McDowell, Carrie
Collaborator

Kong, Semonie
Collaborator

Wilson, Ashley
Collaborator

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