

How to ask

Preparation is key to making request

Question:

My boss doesn't negotiate. Rather, he either accepts or rejects a request. My department is in critical need of a new piece of equipment. I am reluctant to present this request, fearing he will say "no" and close the door. Do you have any suggestions for approaching him?

Response:

My first recommendation is to take a step back and gain a broader perspective of the situation and your relationship with your boss. He hired you because he was confident you could deliver the results he needs to be successful. Otherwise someone else would have gotten the job.

In your role, you will, from time to time, need to bring to his attention ideas to improve your department's productivity and profitability. Some of your recommendations will fall into the category of must-haves, while others will be like-to-haves. The key to securing his support will be how well you position your idea as something that will advance his agenda. The old adage, "People love to buy, but hate to be sold," offers great advice. Since people do things for their own reasons, not yours, how well you link your recommendation to his agenda will certainly influence his desire to support you.

When putting your thoughts together for this discussion, map out why it's in his best interest to grant your request. Take a moment and imagine you are standing in his shoes. Review the information you are planning to present to him through his eyes. Is it convincing? Does it provide him with what he needs to justify to his boss or bosses why allocating this money is in the company's best interest? If your

answer is yes, good job. If your answer is no, then you need to spend more time building your case before you meet with him.

It is important to be mindful that you are probably not the only manager asking him for resources. He has other direct reports who are asking for money, time, equipment, etc. He must determine from all of these requests which ones are urgent, which ones are important and which ones are not essential. If you come to the table ill-prepared, you become the path of least resistance and will be summarily dismissed. However, if you build a case that makes it easy for him to say yes, then you will increase your chances of securing the support you need.

As part of your preparation, develop a chart comparing your department's current productivity with what you expect to happen as a result of implementing the new equipment. You may find it necessary to make some assumptions when developing the numbers. That's OK, as long as you present them up front. Do not attempt to bamboozle him and risk compromising your relationship with him. You don't want him to view you with contempt. Instead, take the high road. Do your homework, rehearse and then give it your best shot.

Resist the temptation of having a casual discussion with him to feel him out until you have worked through all the numbers. If you engage him in a discussion about this issue when you are not prepared, you risk surrendering your initiative. An ill-timed move may cause him to take a stand on your issue which may be difficult, if not impossible to change in the future.

Your focus right now is to gather the information and develop your strategies, alternatives and options. As part of this process, anticipate the unexpected. Then play out several approaches and imagine his reactions. Determine your counter-responses and assess if you should change your approach in order to get a better response. This is your dress rehearsal. It may seem quirky, but it is critically important. You do not need to talk out loud to achieve the results you desire from the process. You simply need to review in your mind's-eye what you will say and how. From a learning standpoint, the brain does not know the difference between the real thing and your

imagination. Similar to an Olympic athlete who sees the perfect 10 in their mind before their performance, you must see this performance before it can become a reality.

Your boss does not seem to be a man who likes a lot of words, so this is not the time to be chatty. Rather, it is time to measure your words, be thoughtful about what you say and how you say it, and be concise. I have seen people unravel a negotiation that they had won because they didn't know when to stop talking. Make your approach align with his style. Anytime you make the other person extend effort on your behalf, you create a feeling of disconnection. Make sure to keep him engaged, to build rapport and make it easy for him to say yes.

Follow these simple steps, and I feel confident you will achieve a positive result:

1. Tell him the situation.

Highlight the facts and figures that speak directly to the risks, concerns and potential negative impact to the business.

2. State your recommendation. Be compelling, not pleading.

3. Present your analysis.

Focus on the net results including the positive results of productivity and the ROI analysis.

4. Review the benefits.

Tell him why this investment will benefit him and the company.

5. Ask for his support.

6. Sit quietly and let him think. Don't talk. Wait for his response even if it takes hours. If he wants more information, he will ask you. If he says no, challenge his decision without being confrontational.

Do not be surprised if he says yes to your recommendation for buying a new piece of machinery, but maybe not the one you want. That's still a win. Say "thank you" and move on.



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