

EBOOK

# 5 Steps to Secure Budget and Get Buy-In

A GUIDE FOR PROSPECTIVE  
TECHNOLOGY BUYERS



# Introduction

As a technology vendor, we understand the challenges prospective buyers face when introducing new technology to their managers and budget holders. **This guide empowers you to confidently present your technology business case** in a way that will secure the resources needed to move forward with an investment that will align with your organization's topline priorities and improve your department's contributions.





## Step 1: Understand Your Manager's Priorities

**Before diving into any technology's features, take a step back.** Identify your manager's key performance indicators (KPIs) and current pain points. Are they focused on increasing efficiency, reducing costs, mitigating risk, setting up or reinforcing disaster recovery, or improving quality and consistency?

TAILORING YOUR PRESENTATION TO ADDRESS THESE SPECIFIC NEEDS WILL RESONATE WITH THEM MORE EFFECTIVELY.





## Step 2: Highlight the Technology's Impact

**Focus on Benefits, Not Features:** Don't get bogged down in technical specifications. Instead, highlight how your proposed technology directly addresses your manager's priorities.

- ✔ **Quantify the Impact:** Use data to illustrate potential improvements. For example, if this technology can save 10 hours per week on industrial code or data analysis tasks, translate this into increased productivity or cost savings.
- ✔ **Showcase Customer Success Stories:** Find case studies or testimonials demonstrating how the technology has helped companies similar to yours achieve tangible results.





## Step 3: Create a Compelling Presentation

**Keep it Clear and Concise:** Managers are busy. Aim for a presentation that's clear, concise, and visually appealing. Use strong visuals like charts and graphs to support your points.

**Frame the Opportunity:** Position the technology as a strategic investment, not just a cost. Explain how it can create a competitive advantage, generate revenue, and/or improve team performance.

**Offer a Proof of Concept:** Suggest a pilot program to demonstrate the technology's value before committing to a full purchase. This will lower the barrier to entry and ease the way for a "yes" to move forward.





## Step 4: Address Potential Concerns

**Security:** Be prepared to discuss the technology's security measures and data protection protocols. Discuss the technology with your IT or security team to get their perspective and buy-in.

**Implementation:** Explain the implementation process and any required training for your team. Create a guide or project plan to show how this will work, while minimizing disruption to operations.

**Cost:** Present a clear cost breakdown and highlight payback and return on investment (ROI) calculations.





## Step 5: Next Steps

**Call to Action:** Clearly outline the next steps after your presentation. Do you need approval for a demo? Suggest key stakeholders that should join the demo to ease the way for a quick decision on next steps. Ask about additional information that you can provide to support your manager. Find out what other stakeholders need to weigh-in and what matters most to them in connection to this investment.

**Follow Up:** After your presentation, don't let the momentum fade. Send a follow-up email summarizing the key points and reiterating the call to action, preferably with a timeline for next steps and detailing what they are.

**Bonus Tip:** Partner with the technology's sales and demo team. Let the vendor team know about your efforts. They can provide additional resources, answer specific technical questions, and craft a customized proposal that helps to address the outlined steps above.



# Conclusion

By following these steps and leveraging the technology vendor's resources, you can effectively champion the technology and secure the buy-in needed to move forward. Remember, you're not just promoting a product, you're proposing a solution that can benefit your entire organization, and in turn amplify your impact and elevate your career.

To speak to a Copia Automation representative about Copia Industrial DevOps Platform and help manage your automation workflow more effectively, [visit copia.io](https://copia.io).

