

Making a Business Case *for Center Membership*

Mike Lewis, Sun Microsystems, and Julie Bradbury, Cadence Design Systems, made successful cases for Center membership because they believed that membership would provide both tangible and intrinsic benefits to their organizations. In this article, they share their stories.

Internal Business Perspective

Both Mike and Julie emphasized that you must create a case that solves real business problems and demonstrates value to the organization. As with any piece of targeted communication, you must first understand what is important to your audience. Every organization has different priorities, and these priorities change from year to year. In his proposal to NCR, Mike knew that his managers were concerned about efficiency and cost savings. For her part, Julie knew that Cadence wanted to improve the quality and timeliness of their information products to increase customer satisfaction.

What are the top three priorities in your organization, both from a top-level business perspective and from your part of the organization? Can you clearly connect the benefits of CIDM membership to these priorities? If not, then you probably will not sell the idea of CIDM membership.

Many information-development managers report to managers who do not possess an in-depth understanding of our field. Most often we report to mid-level engineering or marketing managers who rely on us to keep the information-development ship on course.

Although your management may not understand how your department works, they do understand

- ◆ Increasing return on investment
- ◆ Increasing productivity
- ◆ Increasing quality
- ◆ Increasing customer satisfaction
- ◆ Creating opportunities to compare performance/metrics with others in your industry
- ◆ Improving time to market
- ◆ Improving delivery of information, including offering less-expensive media choices



- ◆ Increasing staff retention
- ◆ Increasing flexibility to create “custom” client solutions

To sell these benefits, however, you must be able to focus on the items important in your unique case. You need to understand where your organization is today—how productive, how flexible, how skillful, and so on.

Financial Perspective

Once you have taken a snapshot of your group’s strengths and weaknesses and understand where you could make improvements that are meaningful in terms of organizational priorities, you are ready to quantify your case.

If your organization has standard methods of measuring productivity, customer satisfaction, quality, and staff performance, then by all means use them. This adaptive use helps your target audience feel comfortable with your analysis. Often, though, you need to adapt or invent a quantitative approach.

When Mike was at NCR, he worked with his finance people to arrive at a full, burdened headcount cost. In other words, he determined how much it cost NCR to fund one, full-time information developer for an entire year, including benefits, office space, and so on. Once he had this key figure, he could calculate time savings in process improvements he learned through CIDM participation and then quantify cost savings.

Mike says that the important thing is “to have a lot in the credit column when asking for more resources.” He emphasizes there are two types of credit. The first involves your credibility with your management; if you have used requested resources wisely in the past, they will view new requests more favorably. The second credit reflects how much you saved the company in the past. For your managers to know this latter figure, you need to be tooting your own cost-cutting horn on a regular basis.

While Cadence also expects a business case to include a return-on-investment (ROI) analysis, they also want to know how their information products stack up against others in their industry. Julie made the case that participating in the CIDM’s conferences and research activities allowed her to do a competitive comparison. Because Julie had both credibility and credit from past efforts, she was in a strong position when making the initial case for CIDM membership. In fact, when she brought the issue to her manager, her manager said, “Well, this is a no-



brainer.” While we might consider this an “easy sale,” remember, Julie had demonstrated a consistent, successful use of corporate resources over many years.

And, even though the initial “sale” might have been easy, Julie made sure that her managers and peers found out how CIDM membership benefited Cadence throughout the year. Based on her interactions with peer CIDM members, Julie can demonstrate with confidence that many of Cadence’s information-development practices are “best in class.” Furthermore, she can point to cost savings and cost avoidance that she gained by benefiting from the experience of others.

Learning and Growing Perspective

Mike and Julie caution against a “shotgun” approach to the benefits of CIDM membership. To maintain and improve your credibility within the organization, they recommend that you focus your case on a few, well-articulated and quantified benefits of CIDM membership. Then, you need to take every opportunity to report progress against the projected case. You want to avoid the trap of the “mysterious money sink hole.”

Sometimes managers fail to report results to those who authorized the expenditures. Then, when the requester asks for renewal money, they must make the case all over again with less credibility. When you get others to spend scarce corporate resources on behalf of your organization, you should regularly reinforce their good decision by telling them of improvements that have been made using the measures you originally presented in the case.

Often, CIDM membership creates unanticipated benefits for your organization. Be sure to report on these “extra credits,” because they help educate your managers about the field of information development. For example, when Julie was planning to implement a content-management system, she spent time discussing the experience with another CIDM member. This member told her that having people on staff with programming skills vastly reduced the implementation costs because fewer consultant dollars were needed. Julie used this advice to make sure in-house staff were available, which, in turn, decreased the investment she needed to request.

At NCR, Mike’s long tenure and consistent success had given him a large credit balance, as he called it, with his managers. He said that when he was putting together his initial case, he focused 75 percent of his arguments on projected cost savings associated with membership and 25 percent on career growth opportunities for himself and his staff. He made the argument that “I’ve been here quite a



External Validation

while, and I haven't asked for a lot of personal growth and development dollars. I believe that the CIDM will help me move to a higher level of competence.”

Julie has used the CIDM activities as a way of showcasing and enhancing the talents of her staff members. She encourages them to make presentations at conferences and to write articles for *Best Practices*. These opportunities help with staff retention and recognition as well as giving staff members a chance to network with peers across industry and company borders. The CIDM is one of the few organizations within the technical publications industry recognizing and promoting innovations and innovators within the industry.

External Validation

The CIDM offers its members many benefits, especially for organizations that renew their membership year after year. We often lament that our organizations fail to value our efforts as they should and wish we had external sources to validate the work we are doing. The CIDM offers organizations just this sort of external validation through its research, conference, and newsletters.

One way to get recognition for your efforts is to write articles for *Best Practices* that share your success. Upper managers are very impressed by our articles and by the excellent exposure their companies receive. If you are interested in sharing your successes and best practices, please contact *Best Practices*' managing editor, Taj Whitesell at <taj.whitesell@comtech-serv.com>.

Inside your company, you rarely have anyone with whom you can compare your value and contributions. The CIDM gives you the opportunity to compare efforts and measure your achievements.


Membership Benefits

Center members are part of a team of talented managers who want to share their expertise and experience with each other.

- ◆ Membership facilitates networking with your peers in other companies.
- ◆ The annual *Best Practices* conference is dedicated to management principles and strategies and is the only event within our community to address issues of concern to senior information-development managers.
- ◆ Listservs provide immediate answers and information to resolve day-to-day issues



Membership Benefits

- ◆ The bimonthly *Best Practices* newsletter provides the latest news in the information-development industry and reports on Center studies and member actions.
- ◆ The CIDM e-newsletter provides industry news, survey reports, technology updates, and news from colleagues in Australia and Europe.
- ◆ The Center Web site provides archived issues of the *Best Practices* newsletter and the CIDM e-newsletter, links to industry events and information, abstracts of Center studies, announcements of seminars and conferences, and updated benchmark data about the industry.
- ◆ Benchmarking activities provide valuable and strategic information concerning key issues and best practices with specific results and recommendations available to participants.
- ◆ White papers report on important developments in the field, including the results of Center benchmarking activities, research projects, and case studies of benefit to members.
- ◆ Discounts are available on consulting services from the Associates, workshop fees, and more. 

Developing Your Business Case

By methodically developing your case, you can contribute to these efforts and benefit from them:

- 1 Understand who will be authorizing the expense.
- 2 Make sure that your case is aligned with your organization's goals and priorities.
- 3 Understand the information-development department's strengths, weaknesses, and future needs as measured by organizational priorities.
- 4 Brainstorm how membership in the CIDM will help solve real business problems and enhance your department's abilities to stay ahead of the curve in the future.
- 5 Pick out two or three needs or "problems" that CIDM membership will solve and quantify the benefits.
- 6 Regularly report results against the problem statement and also report other improvements or benefits to ensure continued CIDM membership.
- 7 Don't be afraid to play the staff development card as long as you have made a substantial financial case first. 