Get Buy-In and Budget Approval on Your Product Stack

Why We Wrote This Guide

You're a product manager, and you've found an interesting SaaS app that could help your team build products more effectively. Maybe the app collects user feedback or makes it easy to build digital prototypes. Or perhaps you're interested in roadmap software. Whatever the tool, you're confident it can help you deliver more successful products. The problem? You don't have the authority to buy business software, so you need help developing a compelling business case.

We wrote this guide for you—the product professional looking to add a new tool to your product stack without the authority to purchase it and with no idea how to get buy-in.

You Can Do This

First things first: Don't panic. At ProductPlan, we have nearly a decade of experience helping professionals navigate this situation. We've helped many of them persuade their management teams to greenlight our roadmap platform for their company.

In this brief guide, we've turned those learnings into an action plan to show you how to achieve similar success—with whatever tool you're hoping to add to your stack.

When it comes to acquiring a new app for your team, you might not be the one who makes the decision. But you can be the one who makes it happen. Just follow the tips and best practices below.

How This Guide Works

To convince your company to let you buy and roll out a new tool, you'll need to navigate through three stages successfully:

- **Stage 1:** Conceptual Buy-In (Making the Business Case)

- **Stage 2:** Product Buy-In

- **Stage 3:** Implementation Buy-In

At each stage, you'll need help—and, ideally, enthusiasm—from the right people to move forward with your plan. This guide will walk you through the things you'll need to do and know during each of these stages, including:

- The right people to involve

- Best practices to improve your chances of success

- A checklist of the steps you'll want to take

- What success will look like

Conceptual Buy-In (Making the Case)

The first step to earning approval for a new tool is to persuade your company that solving the problem you've identified will be worth the investment. That means you need a clear and persuasive business case.

At this stage, you're not going to be making a case for any particular app or app-maker. Your goal here is only to convince the people who oversee your team's budget that a tool like the one you're proposing would be worth the investment.

People You'll Need:

Representatives from each team or department that will be interacting with your proposed app.

If the tool is roadmap software, for example, that could include people from:

- Sales
- Marketing
- Development
- Customer Success

A decision-maker (or team) capable of approving the budget for a software purchase.

This might include:

- Your organization's product leader (Director of Product, Product VP, CPO, etc.)

- Your company's investors or board members (if you're with a startup or small company)

- The executive staff

- Your director supervisor (the Director or VP of your department, for example)

Best Practices

1. Define the challenges, drawbacks, or pain points of your current processes.

First, you'll want to write a clear and compelling explanation of the obstacles or problems you could reduce or eliminate with this new tool. In other words, make a business case for the app.

This should be a simple description of the problem, just a sentence or two. It should also be free of jargon and technical details. An example might be:

> *"Our cross-functional team is having difficulty staying on the same page about product strategy and priorities because we don't have a single source of truth for our roadmap. I believe this is leading to duplicate work, release delays, and missed revenue opportunities."*

When you present your request to management at the conceptual buy-in stage, the statement you write here will help you get the conversation started. Writing it will also help you clarify your thoughts about why investing in this tool makes sense.

2. Build a broader business case with the help of your cross-functional team.

As a product manager, you coordinate your work with many other teams: sales, engineering, UX, marketing, and so on. Whatever new app you're hoping to buy, chances are at least some of these other teams will be using it.

This means the tool you're asking to purchase is not just for your product team. It could help other departments in the company improve their processes as well. You can bolster your case by learning how these other departments work today, where they're feeling pain in their processes, and how the tool you're proposing could help them.

Returning to our product roadmap, for example, you'll want to:

Meet with a **sales** representative or sales lead. Ask them what challenges they currently have dealing with the product roadmap.

- Are they confused about which version of the roadmap file is current?

- If you're using a spreadsheet for your roadmap, does Sales have difficulty understanding the product's strategy?

- Do your reps want more visibility into each epic or theme's status, so they can give better estimates to customers about when to expect new functionality?

Meet with members of your **development** team and ask where they see shortcomings in your existing roadmap process.

- Does Dev want more clarity into product strategy and why things are happening than they can find on the roadmap today?

- Do your developers not understand your priorities on the roadmap?

- Do they want more explanation about why you're asking them to build certain functionality?

And so on. Meet with Marketing. Meet with Customer Success. Meet with representatives of any team that might benefit from your new product-stack tool. Let them tell you exactly where they see processes falling short and how they'd use your new app to improve their workflows.

Having all of this information will help you make a much stronger case to your decision-makers. You'll be able to show how this new app could benefit three, five, or more departments across the company—not just product management.

TIP: Ask your coworkers in other departments what challenges the current processes create in their work.

You can use these points to bolster your business case as you try to earn conceptual buy-in for your product-stack app.

Additional benefits of involving your cross-functional team:

As you involve your coworkers in this early stage, you'll be strengthening your relationship with these teams across your company. That can only help you deliver more successful products.

Better still: You'll also be building a grass-roots consensus for the app you're proposing.

These conversations with your developers, sales reps, marketing team, and others will help them imagine how using the new tool could streamline their work and improve their output. This can persuade them to become allies of your plan and act as champions for the app.

3. Quantify your case wherever possible.

This step will vary based on your company's circumstances and the app you're asking to buy. We can't tell you exactly how to add numbers to your pitch. But the example below should give you some ideas. Again, we'll use product roadmap software as the app up for discussion.

Missed MQLs, sales, or revenue

Let's say you believe that because you're maintaining your product roadmap in a static spreadsheet file, you're suffering communication disconnects with Marketing. Maybe on a previous release, the marketing team was working from outdated release-date information and did not build a campaign in time to support your last launch.

Find ways to quantify those lost opportunities.

For example, did you not see the expected number of sales or qualified leads for the first month or two after release?

Or, if the marketing team was using an outdated version of your roadmap to build its messaging, how much did you rework their campaign materials? And how much did this cost in both person-hours and missed revenue during the days your product sat on the market without a marketing campaign that accurately reflected its key selling points?

> **TIP:** Use the app's own ROI calculator (or other data-driven tools) to make your business case.

One way to bring in data to support the business case for a new app is to use a revenue or ROI calculator from the app-maker. Many SaaS solutions have calculators on their websites that let you plug in a few details about your business and generate an estimate about how much money the app could help your company earn or save.

If you're seeking approval to buy a product like ProductPlan's roadmapping app, you could use the app's weighted-scoring tools to demonstrate how such an app could help your team make more intelligent decisions.

TITLE ↓	LANE ↓	BENEFIT			COST			SCORE	RANK ↓
		Brand Awareness	Leads	Revenue	Implementation Effort	Operational Costs	Risk		
	WEIGHT	50	20	20	40	30	20	180	
Solidify company brand	Website	5	3	3	2	1	1	156	1
Create new lead-gen assets	Content	5	4	5	3	2	1	154	2
New features press release		4	2	2	1	1	1	146	3
Webinar	Content	4	5	3	3	1	1	146	3
Improve organic traffic by 25%	Website	4	5	5	2	4	1	144	5
Hire Social Media Manager		4	2	2	2	3	2	122	6
Create podcast series	Content	2	5	4	3	3	1	118	7
A/B test two versions of website Home Page		1	3	3	3	3	3	88	8

By presenting your decision-makers a simple screen like the one here, which you can build in minutes with a free ProductPlan trial, you'll bolster your case that the app can help you leverage data to improve your company's ROI.

Executives and other decision-makers will often expect and even demand data when weighing a software purchase request. Quantifying the benefits of your app-purchase proposal can increase the chances of earning the go-ahead.

4. Bring in outside data to make your case even more robust.

This data will also vary according to your business's circumstances and your company culture. Here's one example of market research you can use:

– What percentage of companies in your industry are using this type of app?

If your management team embraces risk-taking, then you'll want to find data showing that few companies in your industry use the product software you're proposing. This will allow you to present the purchase as innovative and a competitive advantage.

If your corporate culture does not favor going first, then you'll want stats showing that a good percentage of your industry is already using this type of app. This gives you two valid arguments in favor of buying the app:

First: *These apps have proven themselves on the market. Other businesses are using and benefiting from them. It's safe to try them ourselves now.*

Second: *Our competitors could be gaining an advantage over us with these tools.*

5. Leverage social proof with customer case studies.

You can also strengthen your proposal by showing management how businesses like yours are already benefiting from using the solution you're asking to buy.

This can be as simple as reviewing a few top app-makers and summarizing customer success stories relevant to your company.

If you're proposing roadmap software, for example, you might pull a few quotes from app users and include them in your presentation. Here's one from a ProductPlan customer.

> **"ProductPlan has created a mindset shift. It's a much more evolved conversation now. We have a single source of truth for communicating with stakeholders. We have the ability to have fidelity in our ideation process."**
>
> **Allison Kelsey** | *Director of Product Geocaching*

www.productplan.com/customers/achieve-product-goals-product-roadmap/

6. Present in whichever way your decision-makers prefer.

When you've pulled together all of the details above, the next step will be figuring out how best to share them in your conceptual buy-in presentation.

We can't tell you how to do this, except to say that you'll want to match your presentation style and format to your decision-makers' preferences.

If your manager or executive team likes brainstorming sessions or significant discussions, arrange your meeting as an open forum. You can present your high-level proposal and then turn it over for discussion.

(Note: You'll still want to complete all steps above and have that information handy in case the management team asks you for it during the meeting.)

If your management team is visual, maybe you'll want to walk them through a visually interesting presentation—with callouts, relevant stats, and even screenshots from various app-makers' tools.

7. Include your cross-functional team in your pitch.

When you schedule the meeting with your decision-makers, you'll want every advantage you can get. One way to strengthen your proposal is by bringing in other teams across your company to show their support for buying the app.

The good news: At this point, you've had meetings with marketing, sales, dev, and other departments to discuss how the app could solve their challenges. Many of those coworkers will want to help you make your case.

Step-by-Step Checklist

1. Put together a simple, compelling explanation of the problems you're hoping to solve with this new app—in other words, make the business case.

2. Meet with relevant teams across the company and learn how the app might improve their work.

3. Find ways to quantify your existing processes' costs and the potential upside benefits of using the new app.

4. Conduct market research for any industry data that can bolster your case for the app.

5. Review case studies from the app-makers themselves and summarize the most compelling and relevant stories.

6. Build a presentation for your Conceptual Buy-In meeting, tailored to the format preferences of your decision-makers.

7. Invite members of your cross-functional to join your meeting, especially those who can make their own compelling case for the app.

8. Ask your management team or decision-makers for the meeting to make your case.

What Success Looks Like

You'll know you've succeeded at the conceptual buy-in stage if your decision-makers agree there is a problem that needs to be solved—and it's worth investing in a new app to solve it. Now that you've cleared this hurdle, the decision-makers will let you research the available apps on the market and present your choice to them later.

Product Buy-In

Now it's time to find the right product, with the help of your cross-functional team, and bring it to your decision-makers.

Your management team has given you the thumbs-up to find an app that solves the problems you outlined in your proposal. Your next step is to find the specific app that makes the most sense for your business.

People You'll Need

A representative from each team or department will be interacting with your proposed app.

This will probably be the same group you spoke with in the first stage (or other representatives from the same teams):

- Sales
- Marketing
- Development
- Customer Success

Members of operations teams that might also need to sign off on the new app.

Your company might have several departments that need to vet any new software tools before integrating them into its digital environment. For example:

- IT
- Cybersecurity
- Legal

The decision-maker (or team) capable of approving the budget for a new app.

This will probably be the same group of decision-makers who approved of your plan in principle:

- Your organization's product leader (Director of Product, Product VP, CPO, etc.)
- Your company's investors or board members (if you're with a startup or small company)
- The executive staff
- Your director supervisor (the Director or VP of your department, for example)

Best Practices

1. Let your cross-functional team know you've gotten the green light to find the new app.

The first step is easy: Share the good news with your cross-functional team! Let them know you're probably going to get the okay to buy this tool, and thank them for helping you make the case to management.

2. Ask for input from the teams who will be interacting with the app.

Now that you're researching and comparing various tools, you'll want to know the features and functionality your team considers valuable. Ask for input. What would Marketing want to be able to do with this new app? How about Dev? Other product managers in your company?

You'll find two benefits from this exercise. First, you'll get a better sense of how your company will be using this new tool. That will help you find the best one for your organization. It will also help you roll it out and build processes to implement it effectively.

Second, asking for input from other departments will strengthen your relationships with them. It will also make those teams feel like they're a part of the process, making them more invested in whichever app you choose.

3. Let your operational departments know about your plan.

If you need signoff from IT or your cybersecurity team to buy software, you'll want to bring them into the process now.

You shouldn't do this at the conceptual buy-in stage because, at that point, you're looking only for decision-maker approval *in principle.* There is no need to ask your digital security team's permission that early and create another chance of being shut down.

At this stage, you can let your IT team know that you've already gotten management's okay to implement an app like this. Let them also know that when you've found the specific solution you want, you'll bring it to them to check it out.

Suggestion: Whether or not you'll need to involve these teams, you'll want to know the apps you choose take security and customer data protection seriously. Look for that information in each app you research—and factor the company's approach into your decision.

Here, for example, is how ProductPlan manages our customers' data security.

4. Vet the field and develop your short-list.

Time to research your options. Look at the apps that have earned industry praise, that count businesses you trust as their customers, and that offer the functionality you and your team want.

You'll want to narrow the field to a couple of contenders.

Also, we suggest that you limit your search to apps that let you try the full-featured product for free.

TIP: Narrow your app search to those companies that offer free-trial access to their product.

Those companies are obviously confident the app will speak for itself. It's also the only way to experience the app in your company's environment and learn if it's a strong fit.

5. Ask for a product demo, then give your own.

Schedule live walkthroughs or demos of your short-listed apps. Let their sales reps show you the value of each product app and answer your questions.

You can invite your cross-functional team members to this demo. But we believe it would be better to go through the company's sales demo yourself, learn how to use the product, and then create your own brief demo to show your coworkers.

If you build your own demo using data and scenarios specific to your company, you can introduce the app to your coworkers in a more compelling way.

6. Download the trial version of the app you're interested in—and roll it out to your team.

You might want to trial more than one app. But we recommend that you share only one with your cross-functional team. Otherwise, the exercise could become confusing and counterproductive.

The key here is to use the product and let your team use it as well. If it's product roadmap software, create a simple roadmap (the best apps let you do this in minutes) and share it with your developers, sales reps, and marketing teams. Invite them to view it.

You'll also want your team to experience how the app can improve their workflows. For example, ProductPlan's app integrates with several apps, such as Jira, MS Teams, and Slack.

One way to show your team the value of our app would be to make a change to your roadmap and send an automatic notification to a Slack channel you've set up for your cross-functional team. They'll see how this app can keep them in the loop on roadmap updates—without them even having to go out to the app's URL and check it.
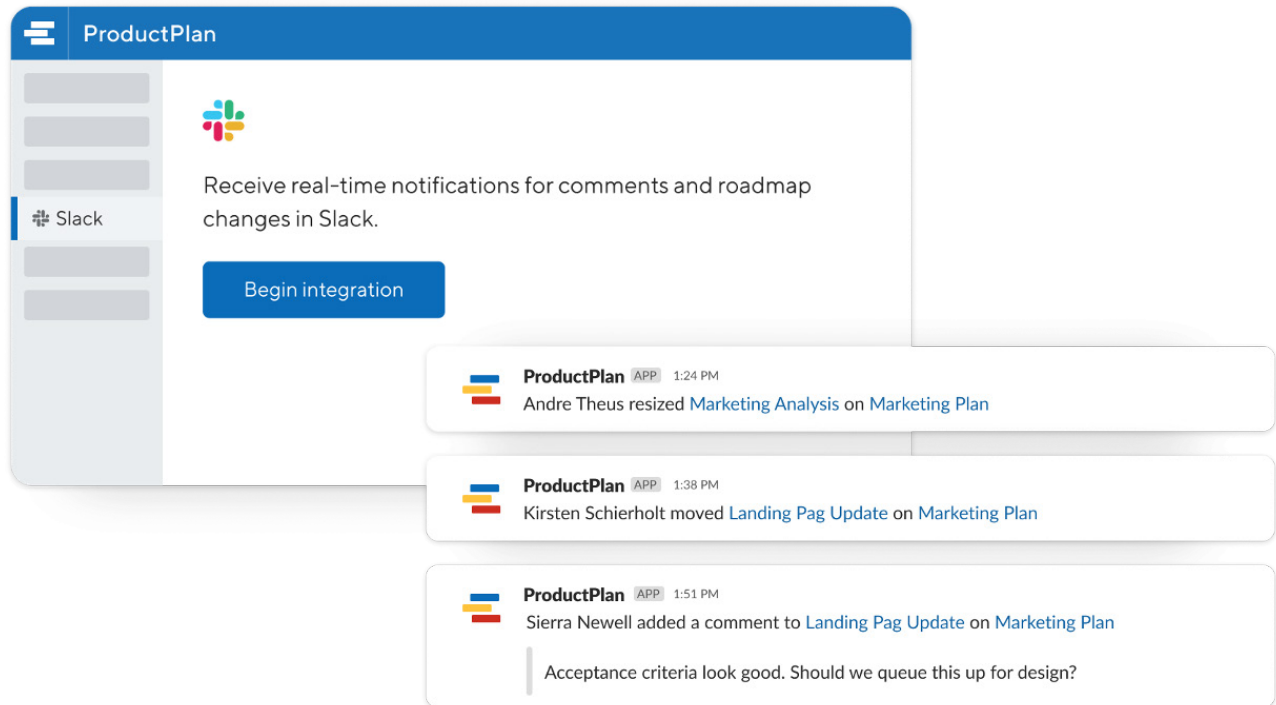

7. Send your decision-makers a relevant update or two about your experience with the trial.

Another useful way to make your case to management at this stage is to grab a screenshot or share a relevant anecdote about how your trial version of the app is already helping improve your team's processes.

You won't need to write long messages to your decision-makers explaining all of the app's benefits. Nor should you send them too many updates. That could turn them off.

But think about how compelling it could be to send a short note to your executive stakeholders explaining that because of your new roadmap app's integration with Jira or Slack, all of your cross-functional teams are communicating more efficiently than ever.

Or consider how persuasive it could be to send your decision-makers a screen of the roadmap app, showing you rearranging new epics or themes, like the screen below. Then add a note explaining that steps like this used to take you hours in PowerPoint.
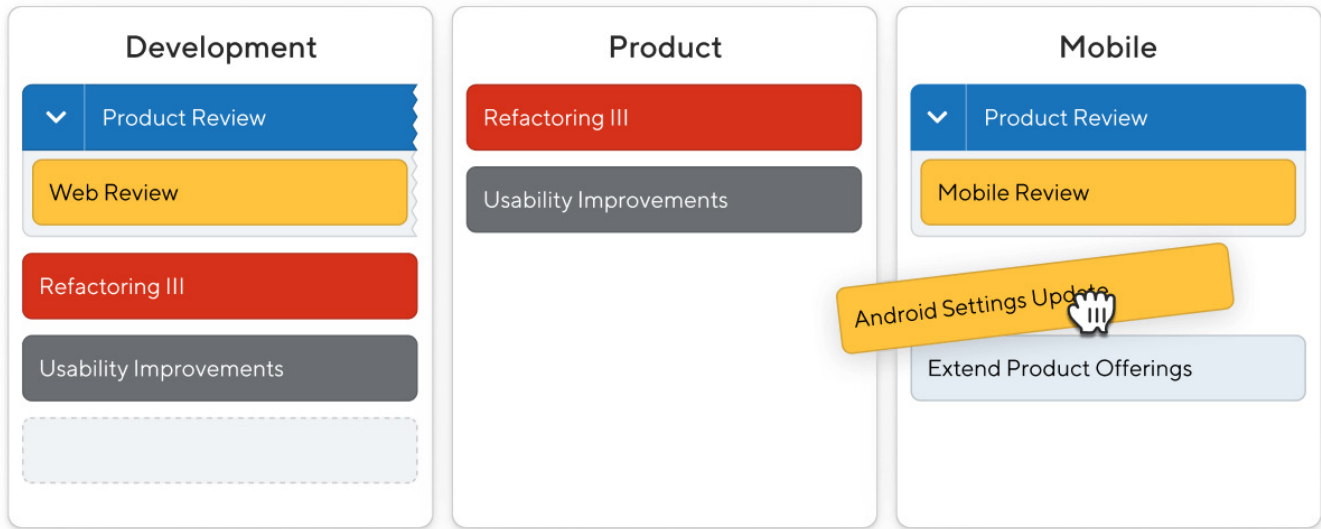
8. Gather feedback from your team during the trial.

As your team interacts with the trial version of the app, ask them what's working. Ask them what isn't working. Ask if they need guidance with any aspect of the tool. It's possible some members of your team just aren't trying it out or aren't spending enough time with it to make it worthwhile.

The more detail you can glean here, the more you can both help your coworkers discover functionality they might not have found on their own and the more use cases and data points you'll compile for your pitch to management.

9. When you've made your app choice, ask for a chance to pitch it to the decision-makers.

Now you're ready to go back to management and ask to purchase a specific app, in whatever quantity of licenses you've decided you'll need.

Note: At the product buy-in stage, your decision-making team might also include your IT, security, and legal departments. You'll want to bring them into this conversation as well.

For this meeting, you'll need to be ready with more answers and data points. For example:

- **Why did you choose this app over the others?**

    You might use industry reviews, customer ratings, case studies, etc.

- **What's our expected ROI on this?**

    For this question, you could return to the risk and cost analyses you created for the conceptual buy-in stage, when you were using quantifiable metrics to make a business case for buying a software solution. Were you able to show how not having a roadmap app led to team communication problems, which led to lost leads or revenue opportunities?

    If so, you can explain that you expect the app to solve those challenges—and result in more qualified leads, sales, and revenue.

    Then, you can show that subscribing to the app itself will cost only a small fraction of the boost in sales and revenue you're anticipating. Put another way: The app should pay for itself many times over.

    Also, invite representatives of other departments who have positive things to say about the app. This is a great way to show your management team that this purchase will benefit several areas of your business's operations.

Step-by-Step Checklist

1. Tell your sales, dev, marketing, and other teams you've gotten the okay to find the right app. Let them know you'll be asking them to try one of them out.

2. Ask those other departments what features they'd like to see in the new app. Ask what specifically they'd like it to do for them.

3. Let any operations teams with a vote in deploying new apps at your company (cybersecurity, IT) know you have approval for a new app and will be running it by them.

4. Research the apps on the market and short-list a couple of top options.

5. Ask for product demos of your top choices. Then create an internal demo that you can run for your team using the trial version of your favorite app.

6. Gather feedback during the trial period from your cross-functional team.

7. Send an update or two to management during the trial, demonstrating how the app is helping already (with short anecdotes, stats on time saved, or app screenshots).

8. Prepare your case for the app you choose (using industry reviews, customer stories, etc.) and ask to pitch it to your decision-makers—including relevant ops teams.

What Success Looks Like

Success at this stage will include two things. First, you've reviewed the field and found the app that best meets your team's needs and fits your company's budget. Second, your management team gives you the go-ahead to buy the app you've chosen.

Implementation Buy-In

Now you're ready to roll out the new app to all relevant teams across your company—and make sure everyone is using and getting value from it.

This final stage involves change management, helping your cross-functional team transition to new processes and a new app. You'll need to be patient. Adopting new technology can be a slow process. The best practices and checklist below should help.

People You'll Need:

All of the people across the company who will be interacting with your new app.

This might include:

- Product
- Sales
- Marketing
- Development
- Customer Success

Best Practices

1. Be your company's first user.

The fastest way to get your team to start using your new app is to use it yourself first. Share your work in the app with them. Invite them to contribute in whatever way the app allows. Show your coworkers this new tool is already working and that you're getting value from it.

Again, we'll use the hypothetical that the digital solution you've signed up for is roadmap software. If you've been maintaining your product roadmap in spreadsheet or slideshow format, spend a few minutes building a new roadmap in the app. And trust us: Building a new roadmap in the app will take only a few minutes.

2. Take care of any app integrations yourself.

When you roll the app out to your team, you want them to get the most value from it as quickly as possible. That means clearing any challenges you can for them and reducing the chances they'll run into obstacles.

If you've told your team, the new app will integrate with other tools they use every day—project management apps, chat apps, ticketing apps—make sure those integrations are in place on the day your team gets access to your new solution.
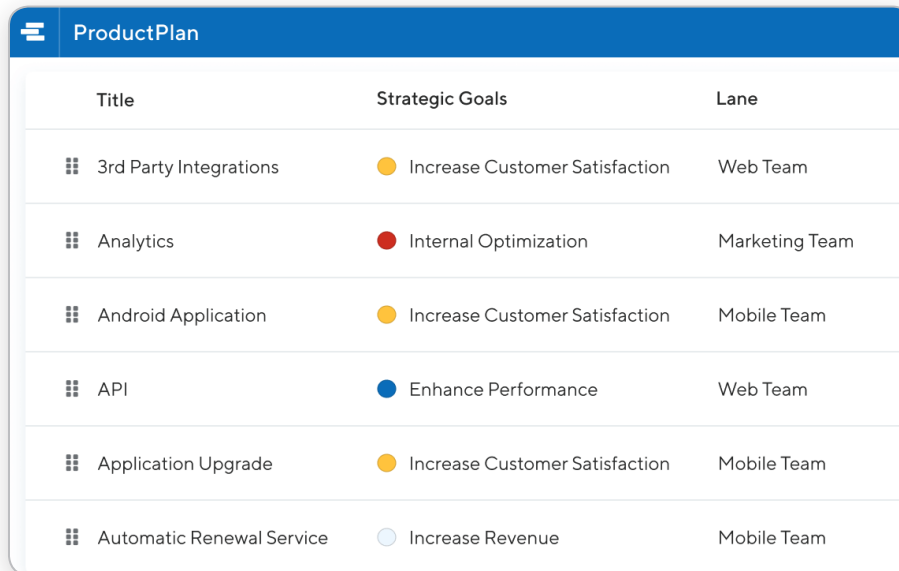
Even if you haven't already let the team know about these integrations, you'll want to do this legwork behind the scenes before they start using it.

3. Document any process changes the new app will affect, and share them with your team.

Here are a few examples of process changes you might want to jot down and share with your team:

- From this point forward, the following URL will always be the source of our current product roadmap. This will ensure we never again need to worry about whether our file rev is outdated or if we've missed an update.

- All changes to the product roadmap are now automatically forwarded to the #productroadmap Slack channel, including everyone on our cross-functional team.

- Instead of sending emails or IMs to the product team, please add any new product ideas or requests directly to the ProductPlan Idea Board.

	Title	Strategic Goals	Lane
	3rd Party Integrations	🟡 Increase Customer Satisfaction	Web Team
	Analytics	🔴 Internal Optimization	Marketing Team
	Android Application	🟡 Increase Customer Satisfaction	Mobile Team
	API	🔵 Enhance Performance	Web Team
	Application Upgrade	🟡 Increase Customer Satisfaction	Mobile Team
	Automatic Renewal Service	🔵 Increase Revenue	Mobile Team

Remember, though, that these process changes will take time. Plan to continue receiving ideas from your sales, marketing, and other teams by email, instant message, voicemail, etc. Be patient. You want your team to embrace this new app's transition, not like it's an order they must follow.

4. Prepare and deliver team training on the new app.

As the product professional who championed this new app for your company, you should own the training and onboarding initiative.

You have several options here.

First, you can use the app-maker's training materials and any in-app onboarding tools they offer.

Second, you can review all of those materials and develop your own training session for your team. The specifics of your training plan might differ across groups. For your developers, you might emphasize specific tips or best practices in the app and focus on various aspects of the tool with your sales and marketing teams.

We would also suggest you welcome and encourage questions about the new app. Making it easy for your team to get help on the tool will help speed adoption and usage across the company.

5. Remind, remind, remind!

Finally, wherever and whenever you can, you'll want to remind your cross-functional team that they have access to your new app.

In the case of roadmap software, you'll find plenty of opportunities to call the company's attention to your new web-based product roadmaps.

Use the roadmap app as the basis of your cross-functional team meetings.

Pull up data from the roadmap app—such as the visual "percent complete" charts of each epic or theme—during sprints or other status meetings.

If your company follows the Scrum agile method, ask your Scrum master and product owner to remind attendees that they should regularly check the roadmap URL to make sure their work still reflects the company's latest strategic goals.

Step-by-Step Checklist

1. Lead by example, and start using the new app.

2. Handle any integrations between the new app and other productivity tools your team uses in their daily workflows.

3. Document the ways your new app will change current processes, and share that list with your team.

4. Roll out an internal training and onboarding program to get your company up and running on the new solution.

5. Look for opportunities to remind your cross-functional team that they have access to this new app—and that they should be using it.

6. Remember: company adoption of new tools can take time. Be patient. You'll get there.
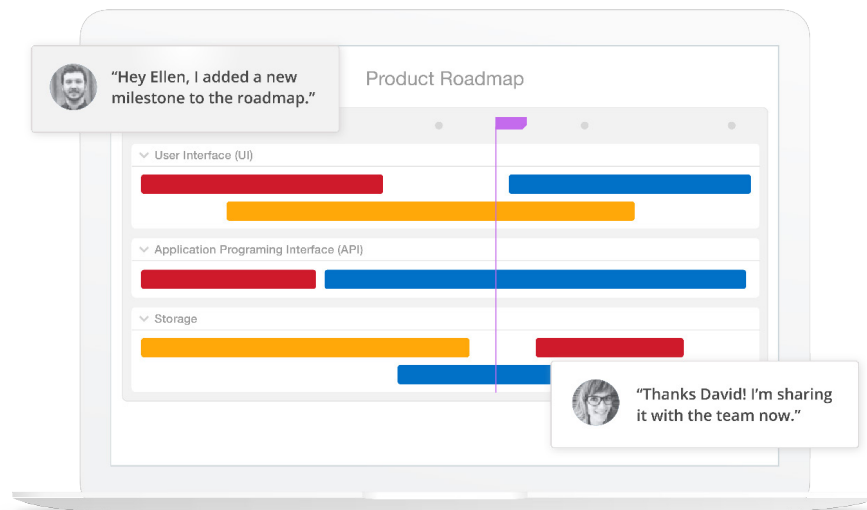
What Success Looks Like

You'll know you've succeeded—and this whole undertaking was worth the effort—when this new app becomes part of your team's daily workflows and your company begins to see the benefits you were anticipating. We hope you achieve it!

About ProductPlan

ProductPlan makes it easy for teams of all sizes to build beautiful roadmaps. Thousands of product managers worldwide–including teams from Nike, Microsoft, and Spotify–trust ProductPlan to help them visualize and share their strategies across their entire organization. With our intuitive features, product managers spend less time building roadmaps and more time shipping products.

Start Your Free Trial