

Gartner for Data & Analytics

Get Stakeholder Buy-in on Your Next Initiative

A proven framework with interactive
templates & tools

6-step approach to influence key stakeholders

Getting buy-in from stakeholders can be a challenge for data and analytics (D&A) leaders. This guide offers tips and tools to help you sell your D&A vision and strategy as a driver of measurable business outcomes, while overcoming stakeholder objections and resistance to change.

Related Resource

[Build your D&A strategy with these five steps.](#)



6-Step Approach to Selling and Obtaining Buy-In for the Business Case for Data and Analytics Strategies and Solutions



Source: Gartner

1

Set a strong vision that resonates with your stakeholders

Focus on describing a positive vision that connects both rationally and emotionally to the stakeholders’ aspirations, ideally developed collaboratively by business and technology teams.

Sample Collective Benefit/Organizational Outcomes	Personal Benefit/Individual Outcome
Increased revenue from raising the sales penetration of new product lines.	Attendance at the end-of-year sales incentive “Winners Circle.”
Project delivered on time and on budget.	Promotion to a more senior job grade.
Holding an end-user conference that attracts new sales prospects.	Presentation of a case study that is covered in social media and raises personal profile.
A new version of the online self-service customer website is launched to market ahead of schedule, reducing operating costs by 5%.	Chief executive recognizes the individuals in the company’s end-of-quarter newsletter.
Improved graduation rates and test scores help the school system and budgets.	As a teacher, I can affect the life of my students for years to come.



Related Resources

[Framework: Data and Analytics Strategy and Operating Model](#)

[Guidance: How to Connect Data and Analytics Initiatives to Stakeholders and Their Business Goals](#)

Template to capture your vision in a compelling way

Set a positive and compelling view of the desired end state that will resonate with the engaged group. Present positive outcomes that benefit both individual stakeholders and the organization as a whole.

<div>Your Collective Benefit/Organizational Outcomes</div> <div>Note: Be inspirational but align with corporate KPIs</div>	<div>Personal Benefit/Individual Outcome</div> <div>Note: Be clear what's in it personally for the stakeholder</div>



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2

Be honest, resilient and courageous in calling out inhibitors

Explicitly identify any underlying inhibitors (also expressed as challenges, problems or risks) to help overcome objections and point out a way forward. Present the inhibitor, its resulting (negative) impact and the proposed remedial actions.

Sample Collective Benefit/ Organizational Outcomes	Resulting Impacts	Remedial Actions
Incumbent technical staff want to protect their positions.	Business benefits and opportunities are missed as attention is diverted to in-fighting. Technical solutions are deployed that rely on key individuals, creating “lock-in.”	<ul style="list-style-type: none"> • Mandate independent architectural and data governance to monitor and approve solution choices. • Review available technologies regularly to validate suitability.
Limited availability of skilled staff may inhibit the ability to execute.	Replace the existing team with new resources who have the requisite technical skills results in a loss of organizational knowledge. An atmosphere of uncertainty and mistrust is created.	<ul style="list-style-type: none"> • Train the current team on new technologies before deployment. • Involve both business and technical team members in the selection and deployment processes.
Low levels of data literacy within the business lead to poor uptake of data and analytics solutions.	Business decisions are made without reference to supporting evidence. Low levels of innovation and creativity exist, along with mistrust of new ideas.	<ul style="list-style-type: none"> • Develop a data literacy program to increase engagement with evidence-based decision making. • Develop analytics prototypes with real business data to stimulate business thinking and socialize new ideas.
There are power struggles over who owns the budget for data and analytics initiatives — for example, the marketing, finance or IT functions.	They lead to divisiveness and a focus on unproductive activities. Positions become entrenched, and cooperation is withdrawn.	<ul style="list-style-type: none"> • Formalize the data and analytics strategy at an organizational level, supported by data and analytics and IT governance processes. • Focus on business outcomes, market impact and overall effectiveness.



Related Resources

[Toolkit: Data Literacy Playbook](#)

[Tool: Data and Analytics Glossary to Support Data Literacy](#)

[Guidance: Develop a Risk-Engaged Culture to Improve Business Decisions](#)

Template to capture inhibitors and acknowledge what needs to change to succeed

Give your stakeholders the positive and inspiring view of how end results can be measurably better, and then introduce the factors that need to be overcome to achieve those desired outcomes.

Inhibitor/Problem to Be Overcome	Resulting Impacts	Remedial Actions



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[Tool: Data and Analytics Glossary to Support Data Literacy](#)

[Guidance: Develop a Risk-Engaged Culture to Improve Business Decisions](#)

3 Propose a D&A solution blueprint linking underlying data back to business outcomes

Effective D&A solution proposals map business value outcomes to the analytic questions and underlying data needed to support them — and connects that to expected business outcomes, questions and decisions.

Checklist for an effective solution architecture blueprint

Presents the D&A solution architecture in a user-friendly way (not the detail vital to the delivery team as practitioners; that lives elsewhere)

Shows it can:

- Achieve the aspirational business outcomes stated in Step 1
- Overcome the inhibitors defined in Step 2

Incorporates the four dimensions of any use case:

- Industry vertical domain
- Business process domain
- Data leveraged
- Analytical method(s) applied

Gartner Domain Data & Analytics Framework (Summary View)

KEY ENABLERS:

- **Strategy** (Vision/Values, Mission, Drivers)
- **Metrics** (Corporate, Business, Operational, D&A)
- **Governance** (Policies, Bias, Ethics, Usage, etc.)
- **Organization** (Structures, Roles, Skills)

Source: Gartner

Business Process Domains

Marketing, Sales, Supply Chain, Finance, HR, IT ...

Industry Vertical Domains

Commercial Enterprise
Public Sector

Use Case

(Target Outcomes, Decisions)

Data Types, Sources and Management Methods

Methods: Data Integration, Data Warehouse, Logical DW, Virtualization, Data Lakes, Data Hubs, Data Quality, Master Data Management, Application Data Management, Metadata Management, ...

Types: Relational and Nonrelational (video, text, etc.)
Sources: Internal, External

Analytical Methods and Styles

Planning, Modeling, Simulation; Visualization; Graph/Network Analysis; Optimization; Natural Language Processing; Machine Learning; Sentiment/Behavior; Streaming; Semantics, Ontologies



Related Resources

Insight: How to Optimize Enterprise Value From Data and Analytics

Toolkit: How to Connect Data to Business Outcomes

Template to customize your architecture blueprint

Use this blueprint as a guide, but customize it for your needs to map business domain analytics across your relevant industry verticals and provoke thinking about nontraditional data sources and analytical methods, as well as key enablers. The aim is to achieve a common definition and framework for describing and optimizing the landscape of domain D&A to improve productivity across the organization.

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Source: Gartner



4 Present the high-level D&A delivery roadmap in business terms

The roadmap is designed to convey outcomes in simple terms for business stakeholders. Separately prepare a detailed plan to substantiate the case, as needed, and to guide the practitioners assigned to the delivery team.

Checklist for an effective roadmap

Simple timeline with key milestones (for major business-facing D&A solution deliverables)

Specific activities that directly involve input from business stakeholders (e.g., an exploration of new business outcomes, collaboration workshops, data exploration sessions and user testing activities)

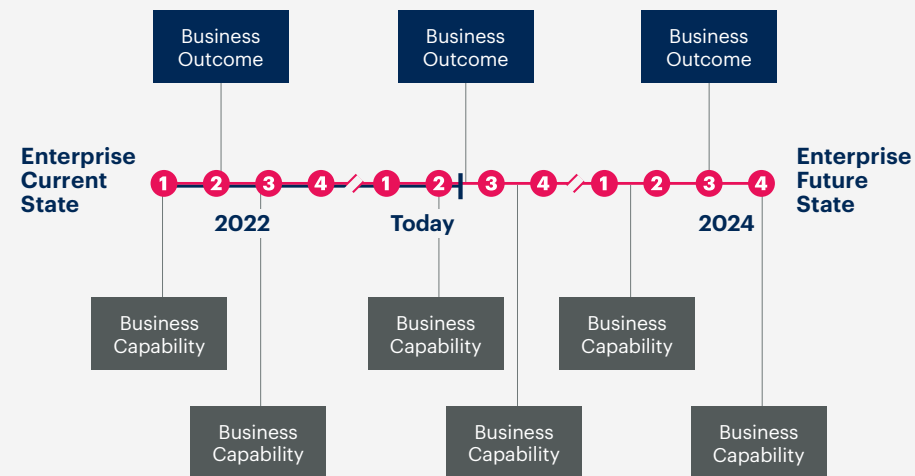
Any critical dependencies on underlying foundational deliverables or enabling capabilities (which may also indicate a high-level view of the required staffing and technology resources)

Don't drill into the underlying detailed delivery plan of activities and tasks at this point (complexity doesn't help the business case)

Ask, does the timeline show stakeholders:

- What they will get
- When they will get it
- What impact it will have on them

Simple Roadmap



Source: Gartner



Related Resources

[Insight: Engage and Influence Business Stakeholders Using Data-Enabled Storytelling](#)

[Tool: Board Presentation Slide Templates](#)

5 Illustrate a cost-benefit analysis summary for D&A within the overall business initiative

Linking back to the points made in Step 1, anticipated benefits for the business initiative must be tangible, quantifiable and desirable to the stakeholders, with the causal contributions of D&A clearly identified. Methodologies vary, but your analysis is always more easily understood if shown as a chart in diagrammatic form.

Checklist for effectively presenting your financial analysis

Tie ROI back to the aspirational vision/outcomes and key benefits of the original vision established in Step 1. (Also track additional benefits that accrue after the fact.)

Focus on leading indicators and related financial expectations. The business case should be forward-thinking and future-oriented, and show a net positive financial return across the initiative.

Make sure business stakeholders champion benefits within their areas and are accountable for the realization of these benefits.

Consider your audience: Line-of-business stakeholders typically seek improved business effectiveness, while CFOs and CIOs may want efficiencies or risk mitigation.

Some organizations, such as government agencies and not-for-profit entities, may have nonfinancial benefits as their main drivers, but even nonfinancial benefits should be specific, measurable, achievable/actionable/assignable, realistic/relevant and time-bound.

Example of ROI/TCO Calculation

All benefits over time – All costs over time = CBA

- Technique for deciding whether or not the investment in analytics is worthwhile
- Over time allows for calculation of “payback period”



Note: Methodologies vary; this graphic is derived from the Gartner tool: Calculating Net Present Value and ROI for Data and Analytics Investments
Source: Gartner



Related Resource

Insight: Use Digital-Outcome-Driven Metrics to Quantify the Business Value of Technology Investments

6

Take immediate next actions to kick-start the D&A initiative

Choose three positive, impactful and immediate actions that will create momentum and get attention. These must be succinct and unambiguous statements that focus on required actions to kick-start the D&A initiative as the culmination of all of the positive momentum developed in Steps 1 through 5.

Next Action (What)	Action to Be Completed by (Who)	Action to Be Completed by (When)	Outcome/Purpose (Why)
Initial collaboration workshop	Project leader	Scheduled for 1 July 2022	To bring business and technical project participants together to begin exploring the available data
Install pilot self-service analytics platform	Technology lead	Mid-July 2022	Enable user testing session of this pilot analytics tool
Source data extraction and make it available in a raw format	Finance manager and asset analyst	By 7 July 2022	Start evaluating source data for quality and fitness for purpose



Related Resources

[Insight: How CDAOs Can Overcome Change Resistance to Deliver the Value of Data and Analytics](#)

Template to record your next actions to kick-start the D&A initiative

Next Action (What)	Action to Be Completed by (Who)	Action to Be Completed by (When)	Outcome/Purpose (Why)



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[Insight: How CDAOs Can Overcome Change Resistance to Deliver the Value of Data and Analytics](#)

Actionable, objective insight

Explore these additional complimentary resources and tools for Data & Analytics leaders:

Webinar

[Impactful Storytelling: Make Data a Key Feature of Your Organization's Story](#)

Determine the best business models for implementing and scaling up data storytelling.

Webinar

[Demonstrate the Value of Data and Analytics to the Business](#)

Communicate a value story that resonates more strongly with your business peers.

Roadmap

[5 Stages to Enhance Your 2023 Data and Analytics Strategy for Digital Growth](#)

Access five proven stages and activities to align all stakeholders and drive business value.

eBook

[6 Proven Steps to Become a Better Leader](#)

Learn what drives CDAO organizational and team success from 560+ of your peers.

Access other insights from Gartner:

[How to Sell the Business Benefits of Data and Analytics](#)

[2023 Technology Adoption Roadmap for Data and Analytics](#)

[Essential Guide to Prioritizing Data and Analytics Around Value](#)

[Drive Business Outcomes by Measuring the Value of Data Literacy](#)

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