



5 Steps to Convince Leadership to Budget for EHS Software

It's budget season. Your organization is engaged in intense planning, number-crunching, and conversations about how to spend the money next year.

Like the smart environment, health, and safety professional you are, you see this as an opportunity. You know now is the perfect time for the company to invest in EHS software. After all, you know the software will streamline your safety program, reduce accidents and injuries, and help you provide your people with the safe, productive workplace they deserve.

All that's left to do is convince leadership you're right.

Gulp.

Actually, it's easier than you may think to get the people in charge on board with EHS software. Advocating for workplace safety in the organizational budget doesn't have to be an uphill battle. Your boss wants to hear about how EHS software can save lives and money—the trick is framing the conversation in terms that make sense to them.

Here are 5 steps to make the case for EHS software in next year's budget:

1. Find a Spot for EHS Software in the Big Picture

What's important to your boss? How about your boss's boss, or their boss? If you're not sure, take a look at your company's mission or value statement to pinpoint the overall direction of the company. Then, listen to what they're talking about in meetings and conversations. Are your leaders investing in innovative ideas, dedicated to building corporate culture, or focused on cutting costs?

Once you have an idea of what's most important to the budget holders, it's easy to work out how EHS software can fit into that goal:

- ◆ **If innovative ideas are the motivating factor**, then talk about the new processes, time savings, and improvements EHS software can bring to the safety program—giving each employee more time to think about things other than safety.
- ◆ **If corporate culture is a top priority**, then frame your discussion around how giving each employee direct access to your safety program via mobile app communicates the value and importance of safety.
- ◆ **If cutting costs is the focus**, look for metrics that could translate into savings or ROI. Maybe EHS can reduce accidents by 10%. How many productive days would you gain by avoiding those injuries? [What does that look like in terms of dollars?](#)

If your organization's goals seem to be, well, all over the place, then looking at reducing the total cost of risk is a great framework for any business decision.

What Is the Total Cost of Risk?

This is a measurement of the total costs associated with all aspects of an organization's operations that relate to risk. It includes insurance premiums, taxes, and fees—the most common components of risk calculations, as well as direct and indirect costs that accumulate slowly over time, and often get overlooked in risk calculations, such as the following:

Direct costs:

- ◆ Deductibles
- ◆ Property damage
- ◆ Sick leave
- ◆ Salary
- ◆ Administrative work
- ◆ Legal fees
- ◆ Uninsured losses
- ◆ Medical costs

Indirect costs:

- ◆ Culture degradation
- ◆ Training / retraining
- ◆ Absenteeism
- ◆ Job coverage
- ◆ Turnover
- ◆ Reputational damage
- ◆ Overtime
- ◆ Morale disruption

2. Find an EHS Software Champion

Once you've identified a way to align an EHS software purchase with the company's top priority, it's time to share your idea—but don't start at the top.

At this stage, you're looking for two key people. One should be a person you trust who will listen to your proposal, tear it apart, and help you rebuild it better and stronger.

The second is your champion. This individual should be a key influencer within your organization who believes in your project. Finding this person may require some work. Mention an EHS software solution as you're waiting for a meeting to start and see whose ears perk up, share a whitepaper ([like this one](#)), and generally start planting the seed that an EHS software solution is a great idea and see who agrees with you.

3. Narrow Your Focus

If you haven't already, now is a perfect time to find an EHS software solution. Look for one that fits your program's needs and have a conversation with your provider of choice—they can share valuable insights into their solution, give you an estimated cost, and provide key data points to help you in the next step.

Not sure what you want or need in an EHS software solution? [Check out our EHS Software Buyer's Guide.](#)

4. Make Your Case

Once you have a proposal built on the foundation of what's important to the top brass and you have a champion, it's time to take your proposal to the top. It's important to have an understanding of the norms surrounding adding expenses to the budget and sticking to them.

If there's an annual budget meeting, make sure you're invited. If it comes down to just having a conversation with the person or team who controls the budget, ask for time in the next appropriate meeting or request a quick sit-down with the CFO.

Whatever the format is, bring your champion and make your case. When you're laying out your request be sure to...

- ♦ **Stick to the big picture.** You've done your homework to find out how EHS software fits into the big picture of your organization—now is the time to share that work. If you're focused on what you want, framed within their top priorities, they will be too. Focus on what they need to know: the benefits and the cost. That's it. Save the details for Q&A.
- ♦ **Bring the numbers.** Boards, owners, and executives expect to see data. A great way to do this is to find a compelling metric that relates to the big picture. For example, if your organization's top priority is cutting costs, you may want to focus on absenteeism. This is the number of unproductive days you experience because people are off or not able to work due to an injury or illness. If the average production line generates about \$20,000 in income every month—each accident or injury that an EHS software solution helps you avoid is another day that line is at full capacity and generating revenue.
- ♦ **Ask for what you need.** Don't leave this conversation uncertain about what you should do next. The best (and maybe only) way to ensure a concrete next step is to ask for exactly what you want. Be prepared for the answer to not be the "yes" you're hoping for. But if you ask directly, it can only be one of three answers: "yes," a task for you to help them get to yes, or a definitive "no."



Introducing KPA Flex

KPA provides Environment, Health, and Safety (EHS) software, consulting, and award-winning online training to help organizations stay compliant with state and federal regulations and maintain a safe and productive workplace. The KPA Flex software platform is easy to use, highly configurable, and designed for a mobile workforce, which encourages broad adoption and an improved culture of safety across the organization.

5. Follow Up

What was the outcome of the conversation?

If it was a "yes," now it's time to go shopping. Find a great EHS solution and engage the team your leaders want involved in the decision-making process. Once you've implemented your program, don't forget to revisit this conversation and share key wins.

If it was "I need more info," don't dawdle—gather the information requested as soon as you can and get it back in front of them. This shows your commitment to this project and highlights the importance of EHS software to your safety program.

If it was a "no," that's okay—it doesn't have to be the end of the conversation. Your job is to find the compelling piece of information or data that will help better align an EHS software purchase with their big picture goals, then wait for the right time to revisit this conversation. It probably won't be next week, but you don't need to wait until next year, either.

*For more information call **866.356.1735**, email us at info@kpa.io.*