

# HOW TO GET YOUR ORGANIZATION TO PAY FOR THE IMPACT ENGINE SYSTEM™

## INVESTING IN YOU

You already know the tremendous value that PMO Strategies programs can bring to your organization. Now that you have chosen a direction for your strategy delivery journey, it's time to invest in your future success with our implementation and coaching programs.

You're excited to dive in, but how can you convince your management and organization to invest in it for your benefit?

The secret to success lies in presenting them with persuasive and compelling evidence that clearly showcases their return on investment in YOU.



## FIND THE FUNDING

Before making your pitch, it's crucial to determine what resources or funding options are available to you. By understanding where the money will come from, you can tailor your messaging to highlight the specific benefits and value that will resonate with decision makers. We will show you where to look and how to have winning conversations to improve your chances of success.

## HAVE TRAINING FUNDING? START HERE.



Look for tuition reimbursement or an annual training budget. This is a great way to invest in elevating your skills while applying what you learn in your real-world environment. Management loves knowing it's not just learning but the application of that learning to create tangible business value quickly.

### 1 CHECK YOUR COMPANY POLICY

Before you approach your manager or HR department, make sure you have read your company's policy on tuition reimbursement or education assistance. This can usually be found in your employee handbook, on the company's internal (intranet) site, or on an HR shared drive. This may include details such as how much they will pay, which programs qualify, if they reimburse or pay for it directly, etc.



This information is important to understand first as every organization has its own unique policies and benefits for employees. The policy may include specific guidance on how to submit the formal request for reimbursement after receiving approval from your manager.

If tuition reimbursement is not an option, consider asking about your department's specific training budget and whether funds from that training budget can be allocated toward the program.



### 2 SCHEDULE A MEETING WITH YOUR MANAGER

Set up a meeting with your manager to discuss your proposal. Be sure to highlight the benefits of the program and how it will improve your skills and productivity at work or even help you achieve your stated planned performance goals.


## PREPARE A PROPOSAL

Once you have a good understanding of your company's policy, draft a proposal outlining the details of the course or program(s) you want to enroll in, the total costs involved, when and how you will take it, and state how it will benefit your job performance. Include some key points that directly relate to your job duties.

**For example: If you are a PMO leader registering for the IMPACT Engine System™, you may want to include:**

- “The IMPACT Engine System™ will give me the step-by-step process I need to build the exact organization we need to deliver on our organization's strategy much faster.” *This is where you would play back to them any of the pain points you've heard them mention about not being able to get projects done, projects taking too long or costing too much, or not being able to get the expected results from projects.*
- “The IMPACT Accelerator Mastermind™ coaching will give me hands-on support from success coaches so that I won't ever get stuck. I'll have access to top industry advice I can call on to ensure we do this right the first time, much faster, and for a fraction of the cost of bringing in a consultant.” *This is where you would add some of the benefits from the website that you believe would be most helpful to you.*



 When you are able to align it directly with your performance management plan that you work on with your manager, this can be the easiest way to ask for approval.

- “The IMPACT Engine System™ certification provides a rigorous review and validation process to ensure that I have not only learned the full system for implementing PMO / strategy delivery teams but that I can also apply it correctly to the real world - in our real-world scenario. For 2023, they are not charging a separate certification fee to obtain this certification, so it saves us money for me to apply for this certification now and get the extra review, validation, and feedback that will cost more next year.”

# 3 BE PREPARED TO ANSWER QUESTIONS

Your manager may have questions about the program, such as how long it will take and how it will fit into your work schedule. Be prepared to answer these questions and provide any additional information needed.

## Tip



*Remember to be patient, professional, and respectful when asking for tuition reimbursement at work.*



*Be clear and highlight the benefits of the program and how it will improve your job performance*



*Be prepared to answer any questions that may arise, such as what's in it for them if you go through this program.*



## Other questions you may be asked by your manager or HR:

1. How does the program relate to your current job and/or your career goals specifically?
2. How will you apply the knowledge or skills you will gain to your position?
3. Have you researched other similar programs? Why is this one the best fit?

# 4 FOLLOW UP

After the meeting, follow up with your manager and HR department to ensure that your proposal has been reviewed and approved. Use this to gather additional instructions for applying for reimbursement.



## HAVE A CONSULTING BUDGET? START HERE.

**1** Check your budget or speak to your finance lead about how much funding you have. What is the approach or process for requesting consulting dollar approval?

There may be a formal online budget request process, budget review meetings, or just a conversation with the approver. You will want to know exactly what you need to do to get it approved upfront.



**2** Prepare a presentation or documentation to show the value of the program and justify the cost. You should outline all the benefits of the program and mention that by taking the IMPACT Engine System™ and including guided implementation and advisory support, you will get results that will enable you to be more self-sufficient, increase engagement and adoption, and get to the business results they are looking for much faster than doing it on your own (even if you've had previous experience in this role).

### Include the IMPACT that this will get you and the organization:

- 3**
- Build highly productive teams working in direct alignment with the strategy
  - Adopt an outcome-focused mindset that is driven by value creation and achieving the greatest ROI
  - Optimize the delivery process to get better results faster while working on the right initiatives



- Deliver results using a flexible and adaptive framework that responds to changing needs
- Drive action and faster decision-making with the right information at your fingertips
- Transform your project leaders into strategic business partners orchestrating change delivery

*This program will get you to the next level with hands-on training and guidance to help organize and prioritize the most important work and to work on the right projects at the right time. (It's usually easier to make the case for using consulting funds when you are also in the IMPACT Accelerator Mastermind™ because the program includes live coaching for you, as well as review and feedback of your specific deliverables you are creating for your organization).*

## IF YOU HAVE A BUDGET FOR BUILDING YOUR PMO OR DELIVERY TEAM:



**1** Identify the stakeholders and individuals who are invested in the successful implementation of your PMO or strategy delivery team. These supporters will serve as your advocates and champions, helping you secure the necessary funding and potentially even being the direct source of approval for your proposal.

**2** In your presentation or discussion, highlight how the IMPACT Engine System™ serves as your roadmap to accelerate the development of your function, resulting in significant time and cost savings for the organization. The program provides a comprehensive guide for building, managing, and elevating your PMO or strategy delivery team in a way that generates the highest return on investment for the organization's strategy in a shorter timeframe.

**3** You'll learn the most effective approach for quickly establishing a PMO that delivers value and create a Strategy Delivery Framework to support the full strategy lifecycle. This means projects are set up for success before they ever start and that every project is delivered in a way that drives a higher ROI. The system provides on-demand ongoing access, allowing you to continually iterate your deliverables and roadmap as needed over the coming quarters and years.

**4** By upgrading to the IMPACT Accelerator Mastermind™, you'll receive hands-on coaching to help you develop the right PMO capability that aligns with your organization's needs. You'll receive real-time feedback from experts with over 25 years of experience, as well as other delivery leaders from around the world, making it an even more valuable investment for your organization.



## YOU ALREADY INVESTED IN THE PROGRAM... NOW WHAT DO YOU DO?



### EXPLORE THE BUDGET

If a benefit or policy is not in place to cover reimbursement, explore the budget to see if there are any available funds that could cover the costs.

Additionally, reach out to other members of management or finance staff to understand how reimbursements are typically handled when starting a new program. Identify the appropriate person or department responsible for approving reimbursements.

### TIMING IS EVERYTHING

Initiate the conversation about reimbursement at the end of Stage 2 of the program after you've had a successful presentation where you prioritized the strategic direction with your stakeholders. At this point, you are demonstrating the potential value of the program and prioritizing key areas of focus.

If you've followed the guidance thus far and brought stakeholders with you through the process, you can talk about their pain points and show them that you have a good process to follow. This will get them to solutions for their root causes, making them more likely to invest in achieving those results. This is an ideal time to discuss the possibility of reimbursement and emphasize how it could help to maximize the value of the program.



## WHAT ELSE CAN YOU DO?



### EMPHASIZE SIGNIFICANCE

By investing in the program, you've not only invested in yourself; you've also invested in the future of your organization as a whole.

This entire program is about driving a higher return on investment for your organization's strategy, and that is exactly what you're beginning to do thanks to everything you've learned.

### If you own it, you keep it wherever you go!

There is an advantage to purchasing it yourself and signing up with your own account - people change roles and companies over time and if you own it, it goes with you when you start your next challenge.

### YOU'VE DONE EVERYTHING!

Know that sometimes the funding just isn't there to get reimbursed, at least not for now. Know that you've done everything you can to get reimbursed, but it might be just as well that you personally own access to these programs. That means they stay with you no matter where your high-IMPACT journey takes you.





## TAKE NOTE

**1** Even if your organization is tightening spending in the current economy, it's worth checking company policies and taking the necessary steps to secure funding for your professional development. This investment in your career can help you stand out and support your developmental goals, making it a worthwhile pursuit.

**2** If any policies or processes related to funding requests are unclear or you have questions, reach out to HR, Finance, or the individual accountable for funding requests. Seeking clarification upfront can save you time and ensure that you are fully prepared to submit a proposal. Gain an understanding of the required documents, timing, and approval processes to streamline the reimbursement process.

**3** Additionally, gathering supporting information to present along with your proposal can strengthen your case for reimbursement. This can include statistics on the potential benefits of the program or training, testimonials from individuals who have completed the program, and any other relevant data that highlights the value of your investment.





# Your Instructor on This Journey

Laura Barnard, PMP, Prosci, CAL, IES

International Keynote Speaker, Trainer, and Business Advisor  
[2021 World PMO Influencer of the Year](#), PMOGA

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Laura has been a driving force behind the integration of PMOs and Project Management into organizational strategy for 25 years. Starting in 1999 with the creation of her first PMO, she spent 15 years as a PMO and strategy delivery leader, gaining invaluable experience in driving sustainable change within organizations. Over the past decade, her company PMO Strategies has been dedicated to helping organizations maximize their returns on investment by unleashing the full potential of project management and PMOs. Laura has developed a powerful system for helping organizations achieve high-IMPACT outcomes for every project.

In 2021, Laura was named the [World PMO Influencer of the Year](#), the only award of its kind, by the PMO Global Alliance, for her many accomplishments in positioning the PMO as the most valuable strategic asset for organizations to deliver their strategy. You can learn more about this on her popular [PMO Strategies Podcast](#) and as a part of the longest-running PMO-specific virtual conference, the [IMPACT Summit](#).

Laura believes that project managers are uniquely positioned to help organizations have a greater IMPACT. She is the Co-Founder and President of [Project Management for Change](#), a nonprofit organization whose mission is to raise the profile of the project management profession while changing the world for the better one project at a time. Their signature event, the [Project Management Day of Service \(PMDoS\)](#)<sup>®</sup>, brings together thousands of project managers to help nonprofits achieve their mission-critical objectives in cities around the world.

Laura has served on nonprofit and corporate boards for 19 years including PMI chapters and several other nonprofit and commercial organizations. She has a Computer Science degree from Virginia Tech, a Project Management Institute (PMI), PMP certification, a Prosci Change Management Practitioner certification, a Certified Agile Leadership (CAL) certification, and PMO Strategies IMPACT Engine System (IES) Certification.

Laura welcomes you to learn more about how they can help you make a bigger IMPACT at [PMOStrategies.com](#).