BEFORE THE BOARD MEETING

Getting a technology decision approved

Boards rarely say no to good technology decisions. They say "not yet" to ones they cannot see clearly. A short guide to what a board needs before it funds a systems change, and how to give it to them.

01 The six questions every board asks

02 What each question is really about

03 A one-page decision paper you can copy

04 Five things that stall approval

For
Anyone taking a systems decision to a board

Time to read
About 10 minutes

Use it
Two months before the board meeting

A NOTE BEFORE YOU START

Most technology decisions do not fail in the project. They stall in the boardroom.

The pattern is familiar. The team knows the systems are holding the organization back. The executive brings a proposal. The board asks three good questions nobody prepared for, and the item moves to the next meeting. Then the one after.

It is rarely a lack of support. Board members are being asked to approve a large, unfamiliar purchase, often for something they never see working day to day. What they need is not more enthusiasm or a better vendor deck. They need to see the decision clearly: what is wrong, what it costs to leave it, what the options are, and how small the first commitment can be.

The people I have seen get a yes at the first meeting did one thing differently. They treated the board paper as part of the project, not as the paperwork before it. They answered the board's questions before the board asked them.

This guide is the short version of what they prepared. Use the parts that fit your board.

Sunil Dua
Kloudserv

The short version

- Lead with the problem and its cost, not the product.
- Show at least two options, one of them doing nothing.
- Ask for a first stage, not the whole budget.
- Name the risks before a board member does.
- Say how you will know it worked.

When to start

About two months before the meeting. Most of the work is gathering facts your team already has but nobody has put in one place.

Worth remembering. A board that says "not yet" is usually asking for clarity, not refusing the idea. The questions that follow are the ones that clarity is made of.

01 What is the problem, and what does it cost us to leave it?

Boards think in risk and mission, not features. "Our membership system is outdated" asks them to trust you. "Twenty-two members lapsed last year without a renewal notice, and our quarterly report takes three days to build" lets them see it.

WHAT THEY ARE REALLY ASKING

- Is this a real problem or a preference?
- Does it touch members, money or reputation?
- Is it getting worse?

HOW TO ANSWER

Three facts and one number each. Lost renewals, staff hours, a risk you can name. No adjectives.

02 Why now?

Every board has a longer list of good ideas than it can fund. Timing is what moves an item up the list: a contract renewal, a strategic goal the current systems cannot carry, a key person leaving, a grant that requires better data.

WHAT THEY ARE REALLY ASKING

- What happens if we wait a year?
- Is there a date that forces the decision?
- Does this support the plan we already approved?

HOW TO ANSWER

Tie it to something the board already owns: the strategic plan, a renewal date, a growth target.

03 What are the options, including doing nothing?

A single recommendation looks like a decision already made. Two or three options, honestly compared, show judgment. Including "keep what we have and fix it" is not a weakness; sometimes it is the right answer, and the board will trust the paper more for having it.

WHAT THEY ARE REALLY ASKING

- Did you look beyond the first vendor?
- Is there a cheaper way to get most of this?
- Who stands to gain from the recommendation?

HOW TO ANSWER

Two or three paths side by side, each with cost, what it solves and what it leaves unsolved.

04 What will it cost, all in, and for how long?

The licence is the number vendors lead with and boards remember. The full cost includes setup, moving information across, training, staff time during the change and the support that keeps it running afterwards. A number that grows after approval costs you more than money.

WHAT THEY ARE REALLY ASKING

- Is this the real number?
- What does it cost every year after?
- What are we already spending that stops?

HOW TO ANSWER

One table: one-time costs, yearly costs, and what you stop paying. Ranges are fine when they are honest.

05 What could go wrong, and how would we know?

Board members have seen projects run over. Naming the risks yourself, with what you will do about each, is the fastest way to earn their confidence. Leaving them out invites the board to name them for you, usually in the meeting.

WHAT THEY ARE REALLY ASKING

- Have you done this before?
- What if staff do not adopt it?
- When would we find out it is off track?

HOW TO ANSWER

Three or four risks, each with a plan and a checkpoint the board will hear about.

06 What exactly are you asking us to approve today?

This is the question that decides the meeting. A request for the whole budget asks the board to bet. A request for a first stage, useful on its own, with the next stage coming back to them with results, asks the board to steer. Boards prefer to steer.

WHAT THEY ARE REALLY ASKING

- How much are we committing tonight?
- When do we get to decide again?
- What will we see before then?

HOW TO ANSWER

One sentence: approve this stage, at this cost, and we return by this date with these results.

COPY THIS

The one-page decision paper

Six short sections, in the order the board will ask. If a section runs past five lines, it is not finished yet.

SECTION	WHAT GOES IN IT
1. The problem	Three facts with a number each. Who it affects: members, staff, finances, reputation.
2. Why now	The date or goal that makes this the right time. Link to the strategic plan.
3. Options	Two or three paths, including keeping what you have. What each solves and what it leaves unsolved.
4. Cost	One-time cost, yearly cost, and what you stop paying. Ranges are fine.
5. Risks	Three or four, each with what you will do about it and when the board will hear.
6. The decision	"Approve stage one at this cost. We return on this date with these results."

Five things that stall approval

The vendor's deck as the board paper. It answers the vendor's questions, not the board's.

One option. It reads as a decision already made, and invites "what else did you look at?"

The full budget in one ask. It turns a steering decision into a bet.

Costs that appear later. Training, staff time and support, left out to keep the number small.

No measure of success. Without one, the board cannot tell in a year whether the money worked, and the next request gets harder.

IF YOU WANT THE PAPER WRITTEN WITH YOU

The Digital Readiness Blueprint

Four to six weeks, fixed fee. We talk to each of your teams, list every system and what it costs, weigh the options without favouring any vendor, and give you a plan in stages with a board deck in your voice, ready to present without us.

Talk it through with us