

Grace Judson



How to Convince Your Manager to Support Your Professional Education

*a leadership resource
from Grace Judson*

~ change leadership for successful change initiatives~



How to convince your manager to support your professional education

INTRODUCTION

*Ask for what you want.
But don't **just** ask.
Craft a compelling pitch.*

When you want to attend training or a conference – the [Change Leadership program](#) or something else – getting your manager to approve the expense is a challenging but obviously crucial first step.

I created this guide to walk you through a process that will give you a good chance (no guarantees, of course!) of getting a “yes” to your request. Along the way, you’ll get a glimpse of some of the tools I teach for negotiation, communication, and what I call “professional empathy.”

As a hiring manager and department director in my past corporate life, I have insight into what your manager is likely to want you to prepare and what they’re likely to ask. That’s why I



say that by going through these steps, you'll have a good chance of getting a *yes* to your request.

STEP ONE: ACKNOWLEDGE YOUR RIGHT TO ASK

Too many people believe they should wait to be *offered* an opportunity instead of standing up to *ask*.

Or they feel vulnerable about asking – what if the answer is No? – and hesitate.

Or they're not sure if they've "earned the right" to ask.

There may be other doubts that come up for you. Whatever it is, if you feel even the slightest hesitation about asking, *stop*, and consider these questions:

1. Has your performance over the last six months been at least acceptable, or even excellent?
2. Was your last performance review (if you've had one since being hired – and if your employer does performance reviews) at least "meets expectations" or better?
3. Have there been any discussions in the last few months that would lead you to believe your manager is in any way displeased with your performance?

The simple fact is that as long as you're doing your job according to expectations, asking for training so you can do even better is entirely acceptable.

If you're *not* performing to expectations, you'll need to take a hard and serious look at yourself and figure out why. If it's because you need that training in order to excel, definitely go ahead and ask, but be prepared to justify the need especially thoroughly.

If, on the other hand, it's because you're unhappy, bored, or otherwise disengaged, then asking for training is unlikely to solve the problem, and you may want to consider other options – including hunting for a job more aligned with your values and desires.



What are the policies?

STEP TWO: DO YOUR RESEARCH

Unless you work for a small company with no official written employee policies, chances are there's some type of documentation on what training is, or could be, company-supported.

What might that include? It could range from:

- No specifics on education or training (or no written policies at all).

This probably means each department or manager has the authority to approve training requests independently. Who on your team or in your department has attended company-sponsored training or gone to a conference? What departments or teams have engaged external trainers for programs? What can you learn from their experiences?

- Clear, explicit policies on types of training and conferences supported, including how and when it's paid for (reimbursed or paid up front), expenses, and so on.

Great. Now you know exactly what to expect. *And*, if what you want isn't part of the policy, remember that there can always be an exception – if you prove your case well enough.

- The policy explicitly states that no training or education is funded.

Don't lose heart. Just because the company policy says one thing doesn't mean you can't ask for and get an exception. Your chances may have become less likely, but that just means you need to prove your case that much more clearly – and make sure you offer options, such as time off to take a course even though you pay for the program yourself.



*What do you
want?*

STEP THREE: WHAT TRAINING DO YOU WANT, AND WHY?

You may already know what program you want to take – for instance, the [Change Leadership](#) self-study program, or a specific industry conference, or some other program you’ve identified as valuable to you.

Or you may have a more general idea, such as *leadership training*, *customer service training*, *PowerPoint skills*, and so on.

Do your research on options. If you only have a general idea, your pitch will be a lot less impressive.

If you’re interested in a particular topic (PowerPoint, for instance) rather than in a specific program you’ve identified, that’s fine. But you still need to collect information about what’s available, including the all-important question of cost and time commitment. Don’t expect your manager to do the research for you! You’re the one who wants the training, so it’s up to you to find out what the options are.

So research and document what’s available. It’s fine to have up to three options, but be sure you know the pros and cons of each.

Also, even if you have just one specific program in mind, spend a little time looking into other options. Where does the program you want fall in terms of:

- the scope of the content (overview or in depth),
- the delivery method (virtual, on-demand, in person, group, individual, self-study with or without additional support, and so on),
- time commitment (live delivery at specific times or on-demand),
- and cost.

If the program you want is lower cost than other similar options, you may have a better case than if it's the most expensive – and if it's the most expensive, you'll need to be prepared to explain why it's also the best option.

STEP FOUR: WHY DOES YOUR MANAGER CARE?

Put yourself in your manager's shoes – what I call “professional empathy.” What will make your attendance at this event or enrollment in this program worthwhile to *them*?

Bluntly, it doesn't matter why *you* want it. You must make the cost, both financial and in your time away from the job, worthwhile to *them*.



*Demonstrate
professional
empathy*

How will what you learn benefit your manager?

How will it benefit your team?

What will you be able to do better that will then reflect well on your manager and your team?

What will you be able to do that someone else is doing now (or that no one is doing now!) – that this new skillset will enable you to take on?

Make a bullet list of the things that apply directly to your current role *and* the role you might be promoted into.

Don't overdo it. Don't set yourself up for failure by setting over-ambitious expectations, or for burnout by setting expectations that exceed your capacity. Be reasonable, but also don't under-sell your potential – or your commitment to your employer.

Think, also, about what objections they might raise. Are you involved in a significant project, so time away would be problematic? Is there a current budget shortfall and / or are cost-cutting measures planned or in progress?



STEP FIVE: CONSIDER OPTIONS

What, exactly, are you asking for?

What other options are you willing to offer or accept?

For instance, do you want everything paid for – the cost of the program, travel if it's not local or virtual, expenses if any, and time off from work to attend?

Or are you willing to share some of those costs?

Putting your own money and personal time into play is a powerful indicator to your employer that you're serious about this and ready to step up and participate. Many employers who will say *no* to paying for the whole experience will say *yes* if you offer to take on some of the cost.

Remember that *time* is a huge factor in your manager's priorities. Whether your team is fully staffed or short-handed, there's never enough time for everything that a department or company wants to get done. If you can and will attend training on your own time, that will be a big factor in your favor.

Bluntly, don't be a prima donna. The education you want will benefit you over the course of your career, which will probably span multiple companies and roles. It's to your own benefit to

participate, financially and with personal time, especially if that's the only or best way to get what you want.

STEP SIX: ASSEMBLE YOUR PITCH COMPONENTS

You now have:

- An understanding that you have the right to ask, and that you deserve at least a fair hearing for what you want;
- Clarity about company policies for training and conference attendance;
- One to three options for the training or conference you want to attend;
- Complete documentation for all costs involved, including financial and time commitments;
- Full, empathetic understanding of your manager's likely viewpoints, needs, and potential objections;
- Understanding of your own options and where you can and are willing to pitch in your time and money.

Got it all?

Is it all solid and complete?

You're ready to draft your pitch letter.





STEP SEVEN: DRAFT YOUR PITCH

Start with what you're asking for, then provide the benefits, address your manager's potential concerns, and finally, outline the costs. Use the following template to draft your request, inserting the appropriate information into the brackets and taking out what's not relevant.

Dear {name},

I would like to attend {workshop/conference/training on subject} and am seeking your support.

This will enable me to support our {company / department / team} goals by {primary benefit}. I'll also gain skills and tools that will help me {secondary benefits}. Furthermore, I'll be able to share what I learn with the team, which will be a benefit to all.

{For a conference, include the sessions you plan to attend.}

{For training, include the learning objectives most relevant to your role and your manager's goals for the team, department, or company.}

{From what I understand in reviewing company policy, there may be budget available for this type of program – is that a possibility?}

OR

I understand that there's no official policy covering attendance at a program like this, but as the saying goes, if one doesn't ask, one never knows! Might there be budget available?}

I recognize that time away from the office is also a consideration, but because of the potential benefit of this program to my efficiency and effectiveness, I believe the investment in both time and budget is well worthwhile.

I'm committed to giving my best effort to {company name}, and I believe this {training / program} offers significant benefits to help me accomplish our goals.

Here's a breakdown of the costs involved:

{Include fees and costs for all the programs you researched and are choosing to include – no more than three in total.}

Program fee: \$

{Expenses – travel, lodging, equipment, etc.: \$}

Time required: {time commitment during working hours}

I am fully prepared to dedicate personal time as needed to complete the learning process and get the most benefit.

{I understand that budget may not be available, so I'd be open to splitting the cost in some way, if that is an option.}

This program is important to me because I believe it will significantly improve my skills and therefore my performance and productivity. Please let me know – am I crazy to be asking for this?

{your name}

Does that last sentence seem odd? It's what's called a "no-oriented question" because it – obviously – is hoping for the answer "no."

Why look for a no? The short answer is, people are much more comfortable saying “no” than “yes,” especially in situations where they’re being asked to make a significant decision or commitment. In this case, saying “no” is great for you, because it means you’re *not* crazy to be asking for the training, and therefore, you just might be on track to get it!

STEP EIGHT: MAKE THE REQUEST

Obvious statement alert: different people prefer to communicate in different ways.

We know that, but even so, we tend to default to communicating in *our* preferred way.

Don’t do that – for this or for anything else that matters. Instead, adapt your communication to the preference of the person you’re about to ask.

Consider: is your manager...

- A morning person, or cranky until after lots of coffee?
Choose your time accordingly – and be sure there’s no urgent meeting or crisis happening.
- Detail-oriented, or a big-picture thinker?



Big-picture people don't want a lot of details, especially not up front. Detail-oriented people crave ... details!

- Chatty, or “just the facts”?

A little small talk improves receptivity with the chatty person, but will only annoy the “just the facts” individual.

- Casual, or more formal?

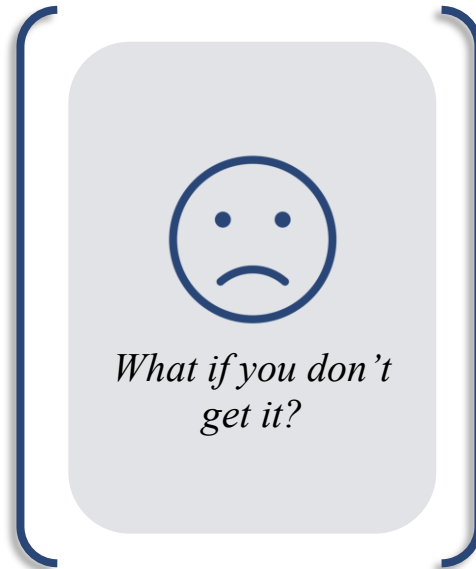
Consider a scheduled meeting if your manager is on the formal side, especially if they hate being interrupted. Otherwise, by all means try an ad-hoc conversation.

- Written, or spoken?

Some people really prefer to have things in written format so they can read and absorb without interruption. Others – generally the more extroverted – like to hash things out in conversation.

At this point, you may be ready to just get on with it and *ask* already.

Don't. Take the time to work through this last consideration: how to approach your manager. It will make all the difference in how your request is received.



STEP NINE: RESPONDING TO “NOT YES” ANSWERS

They said some version of “no” – not now, later, maybe...

You’re crushed. Or at least quite disappointed!

Pick yourself up and figure out if this “not yes” is due to a lack of understanding (you didn’t present the case well), a complete miscue on your part as to available budget, or a “maybe” in disguise.

Ask: Am I out of line to ask what would make this a “yes”?

(This is another example of a “no-oriented” question.)

Take action on what you learn from their answer.

And seriously: consider what it would take for you to sponsor *yourself* for the education you need.

ABOUT THE AUTHOR: GRACE JUDSON



So, why should you pay any attention to me and what I say?

I could give you the usual sort of backstory about how I spent twentysomething years in corporate America, sixteen of them in leadership, witnessing and experiencing so much painful dysfunction, especially around change initiatives. And how that made me want, very deeply, to do what I could to make things better by helping companies get better at overcoming the inevitable resistance to change so they could actually make the improvements they want to make!

All true. But, well, yawn.

Because there are a gazillion change consultants and trainers out there who say pretty much exactly the same thing. Not very inspiring, eh?

Here's what's different about me.

I see patterns. I think in systems and process. And I understand *people*.

These are terrific skills for facilitating change leadership in organizations.

But they're not exactly common – or normal.

For a long time, I thought everyone could do this. But then I realized that being able to see patterns, think in systems, and simultaneously understand the big picture *and* the details involved, as well as understanding the people and their motivations and anxieties around change – no, it's not normal. Or common.

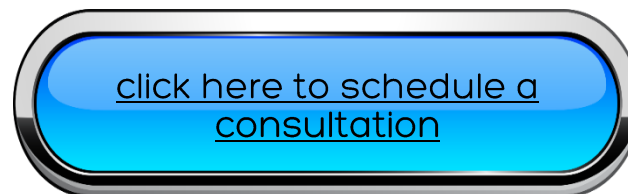
I'm not your "normal" change leadership expert.

I work with midsized companies who might believe they don't have the time or other resources to get help implementing essential change – and I show them how it can be done in ways that fit their culture and their needs, and develops change leaders within the organization for future change initiatives.

The tools presented in this guide are part of a powerful, confident leader's repertoire. And they're just a small taste of the learning available.

WANT MORE?

Let's talk. Click the big blue button to schedule time for a free consultation to see how I can help you succeed at change.



Or follow me on LinkedIn, Facebook, or YouTube.

