

August 15<sup>th</sup> 2013  
1:30 PM – 2:30 PM

A hand wearing a dark suit sleeve and a white shirt cuff is holding the handle of a briefcase. The briefcase is entirely covered in a thick, vibrant green moss. The background is plain white.

# MAKING THE BUSINESS CASE FOR SUSTAINABILITY A TOOLKIT FOR PRACTITIONERS

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# Who we are

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FMI is the major Supermarket Industry trade association, with food retail and wholesale members in 65 countries and services in public and consumer affairs, research, food safety, education and a strong focus on sustainability.

FMI's Sustainability Executive Committee includes global, national, regional and independent grocers and their mission is to identify the industry issues, to prioritize those issues and to work to develop the policies, programs and tools most needed for members to move our industry forward faster. Under the direction of the Sustainability Executive Committee are several committees, including Sustainable Seafood, Sustainable Packaging and a collaborative effort with the Grocery Manufacturers Association and National Restaurant Association called the Food Waste Reduction Alliance, whose mission is to reduce food loss within the supply chain and to send unavoidable food waste to higher use.



Blu Skye is a strategy and management consulting firm that helps companies and industries develop and execute sustainability strategies that create measureable value for shareholders, stakeholders and the world. Our engagements draw on analytic rigor, sustainability insight and change leadership capabilities to build trust and commitment to action.

Founded in 2004, Blu Skye has served a select number of companies, industries, non-governmental agencies and universities in understanding what to do and then doing it. With a particularly strong focus on creating a sustainable food system, Blu Skye's consultants have an extensive history working on the business and sustainable agriculture strategies for clients such as Walmart, Dairy Management Inc, Bunge & Nestlé Purina.

# Why this workshop

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- Sustainability is a strategic imperative for business
- Because sustainability is complex and complicated, executives in many companies often struggles to understand the scope of sustainability impacts and the bottom-line results for their activities in this area
- While there is a plethora of studies and resources documenting the business case for sustainability, but it often goes untapped
- FMI has partnered with Blu Skye to develop a toolkit\* and associated workshop to assist sustainability leaders to crystallize, communicate and enroll executives in the business case for sustainability
- While initially tailored to the retail food industry, many of the lessons are applicable to any sustainability leader

**Our goal: Secure the support needed to broaden and accelerate sustainability initiatives in the retail food industry**

\* FMI will be releasing this free toolkit to the industry late this fall (2013)

# Target and Objectives

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**Target:** By the end of this training, we will be equipped to more successfully make the case for sustainability in our companies and in our industry

**Objectives:**

- Learn new strategies or tactics to make the case and enroll others
- Get coaching on the business case for the sustainability challenge you are facing
- Reflect on how to put what you learned into practice

# Agenda

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1:30 PM	1:40 PM	Opening and practice
1:40 PM	2:10 PM	Instruction and examples
2:10 PM	2:25 PM	Practice and exercise
2:25 PM	2:30 PM	Training close

## Enrollment: quick practice

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In a minute, we will do a quick exercise to practice enrolling others

1. Choose something you really love (an activity, a book, a band, a place to visit,...)
2. Find a partner
3. Partner A: You will have 2 minutes to convince your neighbor to try it
4. Then, you will switch roles



# Recommended approach for making the business case

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<b>1. Lay the groundwork</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Conduct personal assessment</li><li><input type="checkbox"/> Close gaps</li><li><input type="checkbox"/> Chart the “chess moves”</li></ul>
<b>2. Develop the right content</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Clear vision</li><li><input type="checkbox"/> Why now (burning platform)</li><li><input type="checkbox"/> Business analysis (financials, tangible and intangibles)</li><li><input type="checkbox"/> Simple request</li></ul>
<b>3. Conduct powerful enrollment</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Meet them where they’re at</li><li><input type="checkbox"/> Connect to emotions</li><li><input type="checkbox"/> Deliver effectively</li><li><input type="checkbox"/> Refine and persist</li></ul>

# Steps to create and deliver the business case

<b>1. Lay the groundwork</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Conduct personal assessment</li><li><input type="checkbox"/> Close gaps</li><li><input type="checkbox"/> Chart the “chess moves”</li></ul>	<ul style="list-style-type: none"><li>• Determine how you will reach who you want to influence<ul style="list-style-type: none"><li>• Some ideas: build relationship with people who influence them; be ready with elevator pitch in case you run into them; external intervention (NGO, consultant)</li><li>• Consider less orthodox moves like learning journeys</li></ul></li></ul>
<b>2. Develop the right content</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Clear vision</li><li><input type="checkbox"/> Why now (burning platform)</li><li><input type="checkbox"/> Business analysis (financials, tangible and intangibles)</li><li><input type="checkbox"/> Simple request</li></ul>	<ul style="list-style-type: none"><li>• Ensure your outline contains all four elements</li><li>• Identify the logic flow; some examples include:<ul style="list-style-type: none"><li>• Where we are today -&gt; where we are headed -&gt; how we'll get there</li><li>• Simple request -&gt; rationale</li><li>• Case for change -&gt; what strategy is -&gt; how it provides value -&gt; what the next step is</li></ul></li></ul>
<b>3. Conduct powerful enrollment</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Meet them where they're at</li><li><input type="checkbox"/> Connect to emotions</li><li><input type="checkbox"/> Deliver effectively</li><li><input type="checkbox"/> Refine and persist</li></ul>	<ul style="list-style-type: none"><li>• Tailor your argument<ul style="list-style-type: none"><li>• What do they care about?</li><li>• How will you get their attention in the first few seconds?</li><li>• How will you connect to emotions?</li><li>• How will you make it a conversation? Can they co-create the solution with you?</li><li>• Is your request of them clear and simple?</li></ul></li><li>• Develop a back-up plan<ul style="list-style-type: none"><li>• What questions or objections might they have and how will you answer them?</li></ul></li></ul>



# Strategies for making the case

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Reflect on when you have successfully or unsuccessfully made the case within your organization.

- a) What stands out to you as most important, from your experience?
- b) What would you highlight or add to this framework?

If you have an example to share, consider submitting a case study to FMI.

# Getting ready to create your plan

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Think of a situation where you will need to make the business case in 2013 (or made it but were unsuccessful)

## Write-down:

1. Situation (make it specific, e.g. an upcoming meeting):
2. What you hope to accomplish:
3. Decision-maker (name, role) you need to convince:
4. Looking at the 3-step framework, where do you think you might need advice?  
What is one question or pain point do you need help thinking through?

## Next step:

We'll break into groups to get coaching from each other

# Get coaching!

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In a minute, we'll break into groups to share advice with each other

- At your table, identify 2 volunteers
- Choose who will go first
  - This person has **1 minute** to share their situation and question
  - The rest of the group will share ideas and advice for **4 minutes**
- Then you will switch

This will be a fast-paced exercise, we'll use a timer.

# Come back together as a group

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1. Debrief
2. Personal reflection: What are you going to do differently?

**Thank you!**

**Susan, Erin & Julie**