ecoPortal | The Breakthrough Series

Getting safety on the roadmap:

Winning internal buy-in for H&S software



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What's "Breakthrough" All About?

CUT THROUGH THE NOISE. GET CLEAR ON WHAT MATTERS.

This series is all about helping you and your organisations overcome those persistent barriers to transforming safety in your workplace. If you're here, chances are you already know your organisation needs better safety software. The hard part isn't figuring out what you need — it's getting that project taken seriously before it ever reaches an RFP.



Today's Agenda

01 Build a preliminary business case

02 Lead with Cost of Inaction for the CFO

03 Build support early: Finance, IT, People & Culture, frontline.

04 Speak the Board's language

05 The hurdles that can still appear after you hear "yes"

Before we start...

Where are you at with your safety software project right now?

Part 1

Building the Preliminary Business Case

Before you get anywhere near an RFP, you need something much simpler: a case strong enough to earn permission to go looking.

PART 1 • BUSINESS CASE

1. Start with an operational problem, not a safety problem

One of the smartest things I've heard from an H&S leader came from a GM of Health and Safety in Australia, early in his evaluation.

He told me that **if he could show the software saved operations time and cut admin, he had a much better chance of getting buy-in**.

That doesn't mean safety takes a back seat. It means you open the door with the problem the executive team already feels.

PART 1 • BUSINESS CASE

2. Name the trigger, and have your case ready before it arrives

“We want a better safety culture” doesn’t distinguish your request from every other project competing for capital.

So, what does?

A specific, pressing issue:

- Paper-based processes that can’t scale,
- performance going backwards,
- fragmented systems,
- or a platform reaching the end of its life.

The lesson isn’t to wait for a crisis. It’s to have your case ready, so when the tipping point comes, you’re first in the queue.

PART 1 • BUSINESS CASE

3. Do your market homework before the business case

If it doesn't go against your procurement process, the strongest cases I see are built after a quick look at the market, not before.

It’s the same point as my Corolla versus Mercedes story from our RFP session: **know what the market costs before you set the budget.**

PART 1 • BUSINESS CASE

4. Phase it so the first ask is smaller

Asking for everything at once is a big cheque and a big risk in the eyes of a finance team.

So a phased plan isn't a compromise. It's often what turns a "nice to have" into something budget holders can actually picture funding:

- Which sites or business units carry the most risk,
- which modules solve the most pressing problem first,
- and what a realistic multi-year path looks like.

PART 1 • BUSINESS CASE

Sense-check before you take it anywhere.

A preliminary case doesn’t need finished numbers.

It needs substance to show this isn’t a soft ask, and to give each person in the room something to hold onto.

Part 2

Cost of Inaction: Speaking the CFO's Language

Here's the reframe that changes everything: stop thinking about this as procurement, and start thinking about it as investment.

PART 2 • COST OF INACTION

Use sourced numbers to frame it, then bring your own

An ISSA study across 19 countries found that every euro invested in prevention returned roughly €2.20 back.

Here at home, poor health and safety cost New Zealand $5.5 billion in 2025, according to the Business Leaders' Health and Safety Forum's 2026 report.

Use numbers like these to frame the conversation, then bring your own.

Your own baseline usually draws on five categories:

PART 2 • COST OF INACTION

Bring your own numbers

1. Employee time

Hours spent on manual data entry, admin and reporting.

The question isn't "what takes the most time?", it's "where does a small saving multiply by frequency?".

2. Injury and illness costs

Lost work days, claims costs and the productivity impact that follows.

3. Non-compliance costs

Audit findings, fines and penalties, and the cost of normal enforcement action.

4. Legacy IT costs

Licenses, hosting, consulting, and any IT recharges tied up in old or fragmented systems.

5. Operational disruption

The cost of a shutdown or stoppage, often the biggest number in the model, and the one that gets a CFO’s full attention fastest.

Be careful with the numbers you borrow!

A lot of Australian business cases still quote a $61.8 billion cost of workplace injury. That figure is from Safe Work Australia 2012-13 report, and the series was never updated. The same report found workers bore 77% of the cost, the community 18%, and employers just 5%. A sharp CFO will spot that straight away.

Your own numbers make the case. The same goes for vendor quotes: pricing in a business case written a year ago may not hold today, so check validity dates before it goes up.

Part 3

Building the Coalition Early

The projects that get approved aren't the ones with the best case on paper. They're the ones with the most allies in the room before the decision is made.

PART 3 • COALITION

Building the Coalition Early

1

Remember that you’re never selling to one person, your project is also competing for organisational capacity.

2

Build your allies before the decision, so the project can survive you going on leave, changing roles, or getting pulled onto something urgent.

3

Talk to Finance early, and bring the full cost of ownership: licence, implementation, support, internal time, and any IT recharges.

PART 3 • COALITION

Building the Coalition Early

4

The organisations that get over the line fastest often stop describing the software and let people use it.

5

Secure a real sponsor, create urgency, and plan the change. In our world, urgency is the Cost of Inaction, and your sponsor is the person who carries it into rooms you're not in.

DO

- Loop in IT and Finance before you present, not after.
- Ask People & Culture what they're already seeing (turnover, engagement, safety perception). It strengthens your case and builds a natural ally.
- Find out who else influences the roadmap and talk to them directly.
- Secure a sponsor who will carry the case into rooms you're not in.

DON'T

- Go to the Board cold with a fully formed pitch no one has seen.
- Assume safety's value is self-evident to people outside H&S.
- Let the whole case live with one person.
- Wait until the roadmap is locked to start building support.

Part 4

Speaking the Board's Language

PART 4 • BOARD'S LANGUAGE

Speaking the Board's Language

When you're in the room with the Board, the conversation isn't about features. It's about:

- **Strategic Alignment:**
  - How this supports where the business is already headed.
- **Risk Assurance:**
  - What this protects the people and the organisation from.
- **People & Culture:**
  - How this gives workers a voice, builds trust, and shows the organisation takes their safety and wellbeing seriously.
- **Operational Efficiency:**
  - How this makes life easier for frontline teams, and by extension, the whole business.

PART 4 • BOARD'S LANGUAGE

Risk Assurance:

Anchor it to the Officer's Duty

For a board, this is a governance obligation, not a software purchase.

Directors are expected to genuinely know how work happens on the ground, not the version described in a policy document.

That means knowing whether workers are actually being listened to, and whether wellbeing is being managed in practice, and increasingly, that includes psychosocial risk:

- Fatigue
- Stress
- Bullying

The things that don't show up in an incident register until they've already become one.

Due diligence includes making sure the business has processes to receive, consider and respond to information on incidents, hazards and risks.

PART 4 • BOARD'S LANGUAGE

Instead of X, say Y

Instead of:	Try:
We need a new incident system.	Our monthly board report takes days to build by hand, and we can't see trends across sites.
Engagement is low.	Low engagement in hazard reporting and near misses means we have less visibility of emerging operational risk before someone gets hurt.
The current system is clunky.	The manual process delays information reaching management until the end of each month.
We need this to stay compliant.	This gives officers evidence that the processes for receiving, considering and responding to safety information are operating in practice.

Part 5

Before you Celebrate

Getting a “yes” is a big moment. But there are two hurdles I see catch people out even after that.

PART 5

Before you Celebrate

1

“Approved” is not the same as “done”

I've lost count of the times I've heard "we're approved" and then watched it reopen.

Ask what formal steps remain, who holds the pen on each, and which financial year the money actually sits in.

2

The procurement surprise

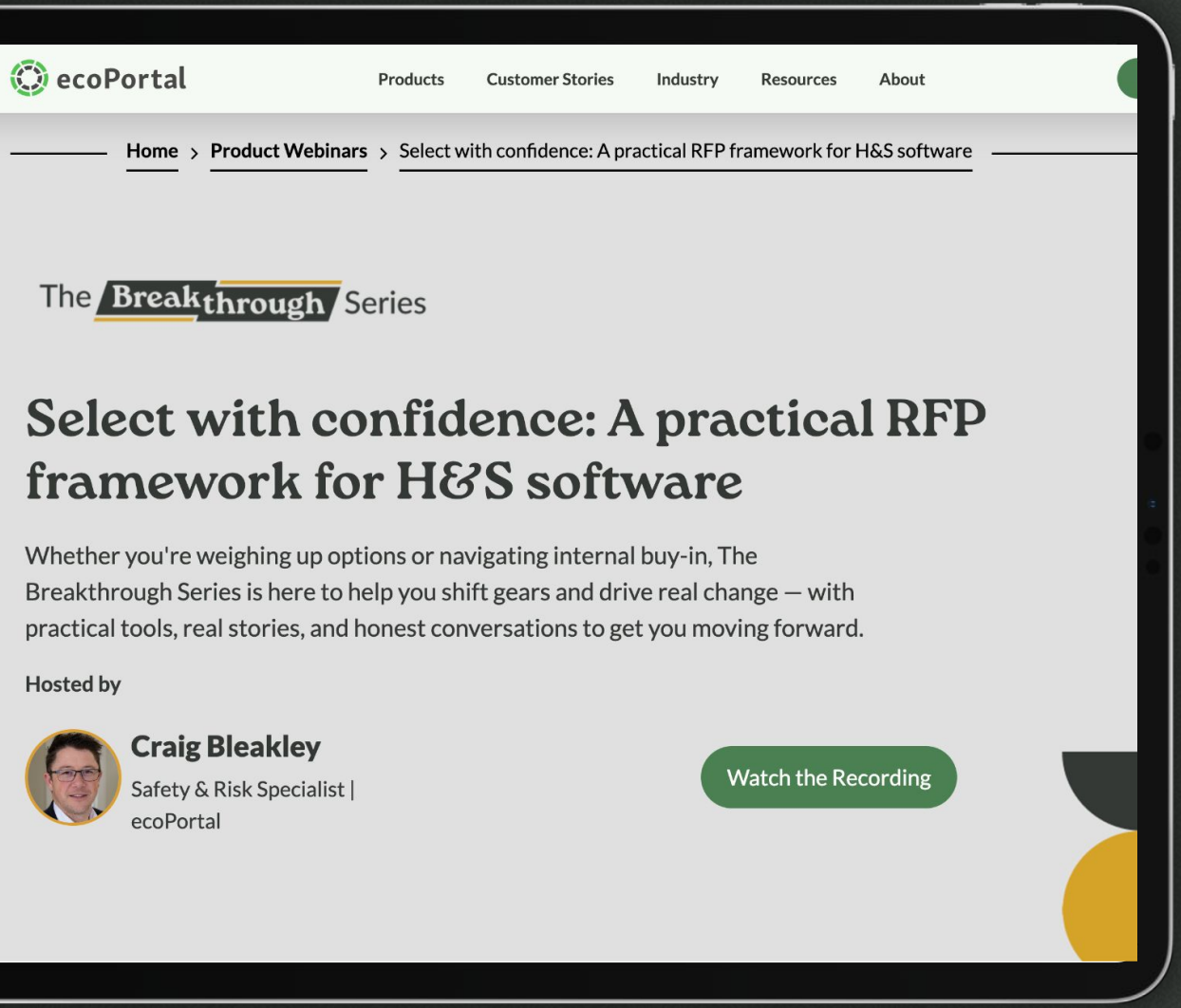
Find out early whether procurement will require a formal process, and at what spend threshold, so it's in your timeline from day one.

And if your IT team has any internal charges that they will pass on to your cost centre, and what that would look like.

Quick recap

- Build the preliminary case around an operational problem and phase it.
- Lead with the Cost of Inaction, using sourced numbers and then your own.
- Bring your allies, your frontline and a real sponsor in early.
- Speak the Board's language. And check what formal steps remain after "yes".

Get this right, and you won't just get permission to go to RFP. You'll walk into it with the internal support you need to see it through.



RFP Webinar

And if you do find yourself at that stage, we've got you covered!

Check out our earlier session, ***Select with Confidence: A Practical RFP Framework for H&S Software***, where we walk through exactly that process.

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Questions?

Enter them into the Q&A tab



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Thank you
For joining us!

