

David Weinstock's Top Tips on Building TA Business Cases

VP of Talent Acquisition, News Story

1 Master the Numbers

- **Hard dollars beat soft savings** — efficiency gains like time saved reviewing resumes are "the cherry on top." Executives want to know where the hard cost savings are coming from, not just productivity improvements.
- **You are spending profit, not revenue** — every dollar TA asks for comes from the bottom line. Make sure the ROI is explicit, not theoretical.
- **Use fully loaded costs in your calculations** — salary alone undersells your case. Multiply by your benefit load (typically 25–35%) to arrive at the true cost of a headcount, and use that number in your model.
- **Understand the EBITDA multiplier effect** — in a PE-backed or growth business, \$1 of profit can be worth \$10 or more in enterprise value. Frame your savings in those terms to speak the language of ownership.
- **Translate TA outcomes into revenue** — if time-to-fill drops by 10 days in a sales organisation, calculate what those 10 extra selling days are worth. That is your hard dollar number.

2 Have the Meeting Before the Meeting

- **Never go in with only your own numbers** — partner with your finance counterpart early. Ask them to validate your figures so you arrive with shared ownership of the data.
- **Is this net new spend or a replacement?** — replacing an existing tool or vendor is a far easier conversation than asking for brand new budget. Know which camp you are in before you walk in.
- **Speak their language** — bring your business case in Excel, not just PowerPoint. Finance teams live in spreadsheets; making it easy for them reduces friction and accelerates the yes.
- **Do as much of their work as possible** — anticipate every objection, model hard and soft costs, and present it fully formed. The more complete your case, the fewer questions you face and the closer you are to approval.

3 Build Internal Champions

- **Find leaders who benefit from what you are asking for** — identify executives who have a vested interest in the outcome (better data, faster hiring, fewer escalations) and bring them inside the tent early.
- **Let others carry your message upward** — when an influential leader raises your case in their own one-on-ones, it is no longer just a TA ask. That changes the dynamic entirely.
- **Persistence is part of the process** — David waited 18 months to get his ATS approved. A "not yet" is not a "no." Keep refining the case and stay in the conversation.

4 Use AI to Stress-Test Your Case

- **Create a challenger GPT before the real meeting** — LLMs default to confirmation bias and will make you feel good about your ideas. Explicitly prompt it to push back, raise objections, and poke holes in your logic.
- **Give it real business constraints** — prompt with your company's actual profit margin, investment appetite, and competing priorities so the feedback reflects the real conversation you are about to have.
- **Practice rejection before it is live** — getting comfortable with hard questions in a low-stakes AI conversation makes the executive meeting far easier to navigate when it counts.