

Communicating with Executives

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About Cadence and Connie

– A full-service Project Management training and consulting firm

- Founded in 1983
- Dedicated to project management -- training, consulting, tools
- World headquarters in Portland, Oregon
- Charter Global R.E.P. for PMI
- Course materials in English, Spanish, Japanese, Dutch, Finnish
- Network of Global Solution Providers (GSPs)

– Connie Plowman, PMP, Chief Operating Officer and VP-Global Sales

- Spent 12 years with IBM in employee, customer & executive education
- Started project management career with Cadence in 1988
- Communicates daily with all levels in organizations and Global Solution Providers
- PMI Volunteer Leader: Component Mentor for Region 1

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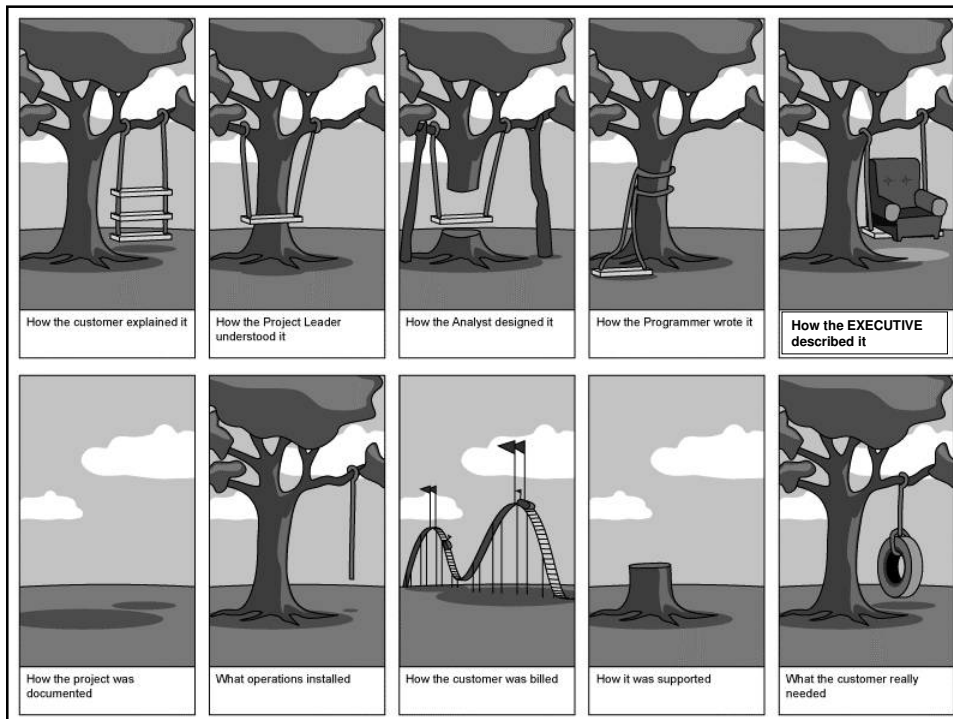
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Effective communication between Project Managers and Executives is crucial for project success.

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3



Tonight's Focus

- ❖ Examine what is **appropriate information** to be communicated
- ❖ Identify **techniques** of how communicate
- ❖ Identify specific **tools** to aid communication
- ❖ Look at ways to build **trust and credibility**

What does an Executive want to know?

Project Managers sometimes think the only question on an executive's mind is:

“When will the project be done?”

What does an Executive want to know?

And their solution is...

A Status Report

- ❑ Containing as much information as possible!
- ❑ In fact, the **LONGER THE BETTER!**

Status Reports

When providing project status, ensure...

- ❑ Facts are correct
- ❑ Data is accurate
- ❑ Right level of detail

Status Reports

Basic Elements of Status Reporting

Actuals

- Overall project schedule
- Major accomplishments
- Cost-to-date versus budget
- Significant problems identified
- Action being taken on problems

Forecast

- Schedule projection
- Cost estimate at completion
- Potential risks and associated contingency plans

Tool: Project Status Report

| | | | | |
|---|-------------------------------|------|---|---|
| GREEN <input checked="" type="checkbox"/> | | -OR- | RED <input checked="" type="checkbox"/> | |
| | | Cost | Schedule | Performance |
| Date _____ Proj. # _____ | | 2 | Tasks Completed Since Last Report: | 3 |
| Proj. Mgr. _____ | | | | Task Starts/Completions by Next Report: |
| Proj. Name _____ | | | | |
| 1 | Proj. Obj. _____ | | | |
| | _____ | | | |
| | _____ | | | |
| | Cost-to-date.....\$ | | | |
| | Budget.....\$ | | | |
| 4 | Cost-to-Complete.....\$ | | | |
| | Variance at Completion.....\$ | | | |
| | _____ | | | |
| 5 | Problems: | 6 | Problem Actions: | |
| | _____ | | | |
| | _____ | | | |
| 7 | Comments: (DECISIONS) | | | |

Limit to key points. Keep it simple. One page.

Executive Focus

Executives are typically focused on...

- Strategic alignment
- Bottom-line impact
- Information pertinent to their organizational responsibilities
- The truth
- Enabling/supporting pro-active behavior

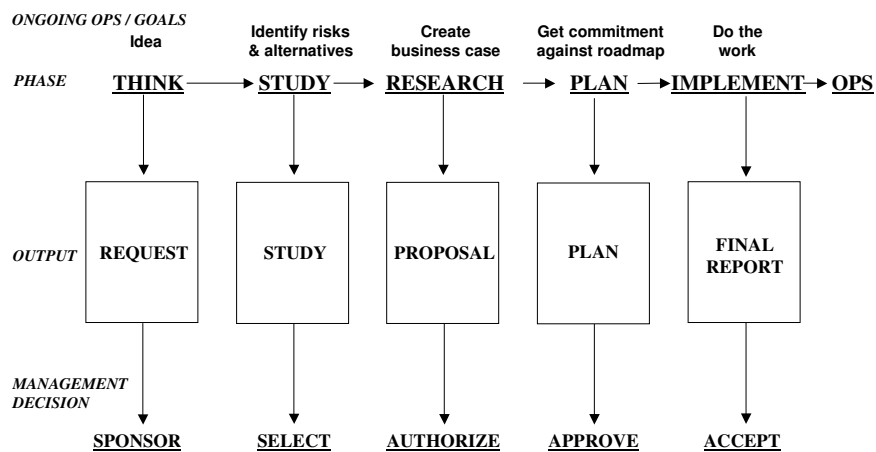
Group Activity

Name the **TOP** challenge you have experienced in communicating with executives

Technique: Frame Your Communication

- Use your Project Life Cycle phases
- Net it out
- Discuss the value to the business
- Relate to the strategic goals of the organization
- Respect their time

Tool: Project Life Cycle



What are we REALLY communicating?

Is this really a problem, or is it

- An assumption
- An Issue (concern)
- Problem
- Risk

Technique: Terms for Communicating

Is this really a problem, or is it

- An assumption *must be verified*
- An Issue (concern) *must be investigated*
- Problem *must be addressed*
- Risk *must be eliminated or reduced*

Communicating Problems

Example of communicating a problem:

Problem arises ...

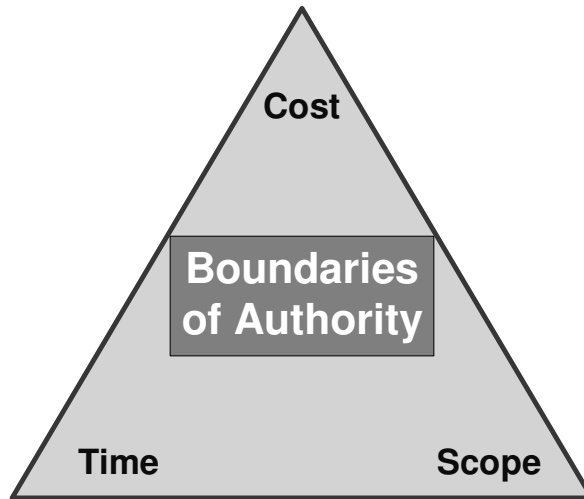
“It will now take four months longer than planned to develop and test the Westminster V3.0 feature set and consequently delay market introduction by 4-5 months”

Technique: Communicating Problems

Steps:

1. Analyze the problem
2. Assess alternative solutions
3. Determine what the impact of the problem and alternatives are on Cost, Time and Scope
4. Identify an appropriate recommendation
5. Document the aforementioned
6. State the facts clearly and concisely
7. Make it graphic and visual
8. Keep it to one page

Boundaries of Authority



Tool: Problem Solving Tool

PROBLEM: It will now take four months longer than planned to develop and test the Westminster V3.0 feature set and consequently delay market introduction by 4-5 months.

| | Problem | Alternative 1 | Alternative 2 | Alternative 3 |
|--|---------|---------------|---------------|---------------|
| I M P O N A N C E T | Cost | ↑ | ↑ | — |
| | Time | → | — | ← |
| | Scope | — | — | ↓ |

Graphic and one page ...

RECOMMENDATION: Alternative 3

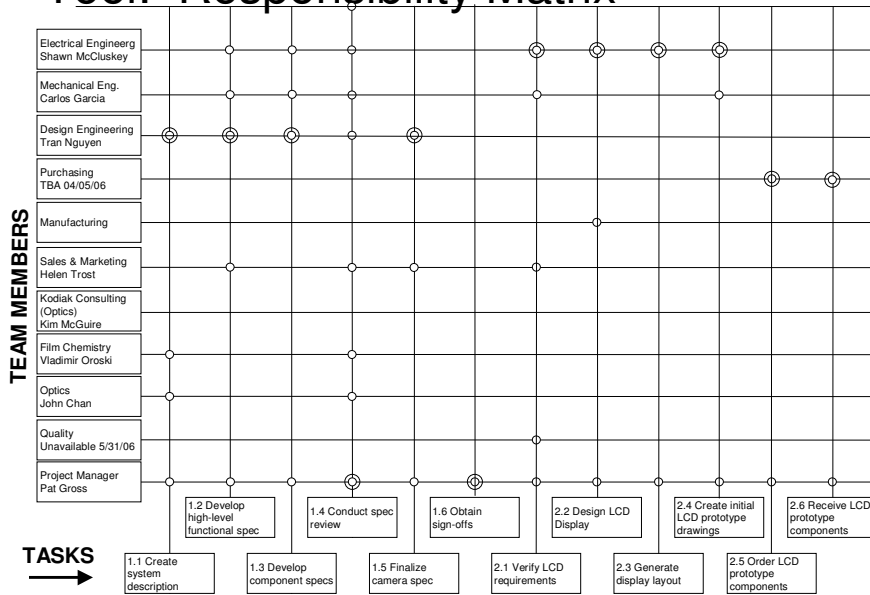
Wazzle Inc are willing to sell the Piccadilly V5.0 at this modest price, as they are facing a cash flow problem and wish to redirect its R. & D. efforts to the Laser Aptitude market. Marketing estimates the feature-rich V5.0 will increase our current market share in the Ultra Mode segment from 22.67% to 38%+ within the first 18 months of introduction. The additional investment will be recovered within the first 12 months. In addition, Engineering state it will be a "plug and go" integration and reduce time-to-market by 3 months.

Communicating Problems

A tool you might find useful:

A Responsibility Matrix

Tool: Responsibility Matrix



Technique: Communication Style

Do some research to find the right style

- ❑ Observe the executive's interactions with others
- ❑ Ask his/her Executive Assistant
- ❑ Find out if he/she prefers to review documents in advance of a meeting
- ❑ Ask colleagues about their experiences

Finding the Right Communication Style

Beware the Golden Rule

“REMEMBER THE 3 B's”

Be Bright

Be Brief

Be Gone

Building Executive Trust

Do not communicate...

- How tough it has been
- Team gripes
- Rumors
- Personality conflicts
- Requests for executives to make PM-level decisions
- Details, details and even more details

Techniques: Building Executive Trust

Things you can do...

- Put yourselves in their shoes
- They have probably been where you are today
- Listen, listen and listen again – learn what is important to them
- Demonstrate knowledge to establish confidence in you
- Do not humor

Techniques: Building Executive Trust

Things you can do...

- ❑ Be forthright and factual
- ❑ De-personalize issues
- ❑ Focus on topics pertinent to executives
- ❑ Demonstrate executive-level thinking
- ❑ Talk to problems in terms of impact to organizational goals or strategies

Techniques: Building Executive Trust

Things you can do...

- ❑ Avoid “public” surprises
- ❑ Provide alternative solutions to issues
- ❑ Know the details, but don’t go there, unless ...
- ❑ Avoid repetitive discussion

Techniques: Levels of Communication

| | |
|----------------|------------|
| Executives | Strategic |
| Directors | Milestones |
| Dept. Managers | Schedules |
| Team Members | Tasks |

Understand the Language

| Executives Say: | Could Possibly Mean: |
|--|--|
| That's very interesting | <i>I disagree</i> |
| We have an opportunity | <i>You have a problem</i> |
| You don't understand our business | <i>We don't understand our business</i> |
| You need to see the big picture | <i>My boss thinks it's a good idea</i> |
| We have to leverage our resources | <i>You're working weekends</i> |
| Our business is going through a paradigm shift | <i>We've no idea what we've been doing, but in the future we shall do something completely different</i> |

Giving Executive Presentations

Tips

- ❑ Start at the summary level
- ❑ Know your audience's communication preference
 - WORDS – sentence and paragraph
 - WORD PICTURES – bullet points, checklists
 - PICTURES – graphs, diagrams

Techniques: Executive Presentations

Tips

- ❑ Know your material
- ❑ Make listening easy
- ❑ Watch your audience
- ❑ Facilitate, don't dominate
- ❑ Avoid repetition
- ❑ For critical topics have one-on-one meetings before a Committee Meeting
- ❑ Listen, listen and keep listening
- ❑ Know when to stop

Summary

- **TECHNIQUES**
 - Communicate by Project Phase
 - Communication Terms
 - Communicating Problems
 - Communication Style
 - Building Executive Trust
 - Levels of Communication
 - Making executive presentations
- **TOOLS**
 - Simplified Status Report
 - Project Life Cycle
 - Graphic Problem Solving Tool
 - Responsibility Matrix

Summary

YOU have to take the initiative to establish good communication with executives.

THINK like an executive, put yourself in their shoes, and it will open numerous avenues to improve communication, and establish credibility and trust.

Questions or Thoughts? Let's Communicate

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through project management*