

## Secrets of Presenting to Executives - 04/13/2005

Have you ever felt like the safety manager who declared, "Sure I work a 40 hour week – by Wednesday!"? Or the HSE director who, in response to my statement that many people are doing the job of two others, ruefully responded, "Two? That's all?"

By Robert Pater

found in Occupational Hazards, April. 2005, p. 58.

Seems like everyone nowadays struggles with time famine. So the last thing anyone wants to hear is they should spend more time doing something not currently on their plate. But sometimes you do get what you pay for. Allocating strategic time to preparing for, and presenting effectively to, executives can pay many times over - in currency of receiving more resources, enhanced professional credibility and influence, support for your efforts so you know you're not fulfilling your mission alone, and more.

I've had the fortune of presenting to many groups of executives in companies worldwide, focusing on energizing and redirecting them towards active safety leadership. Along the way, here are some strategies I've learned that yield strong results but don't have to take tremendous time.

Prepare yourself for presenting with senior execs by:

- Gathering background information, comparables/benchmarks of competitors as well as companies outside your field.
- Being aware of last-communicated company objectives. Be ready to tie in your proposal to these goals ("This initiative should help maintain our standing as one of Fortune's best companies to work for.")
- Knowing hot points/taboo topics to avoid. If you mention 99 things executives like and one they don't, which do you think they are most likely to remember? I had one wood products client where the word "team" had a negative connotation due to association with a failed program. It was critical I knew this in advance so that I could replace an unmentionable that might set them off with a replacement phrase (e.g. "working together").
- Finding out if an executive has personal interests into which you might tap. I recall briefly meeting with the plant manager of an aerospace client prior to my making a presentation to his direct reports. He seemed busy and more polite than interested in furthering discussion – that is, until I saw a golf trophy on his desk and asked about his interest in this sport. Then I told him that at the upcoming seminar, I'd show a method that would simultaneously improve his golf game and also apply to preventing their most prevalent injuries. Other executives have been interested in safety after they experienced injury to a close family member. If you tread carefully here, you can tap these personal interests.

Be sure that you know your underlying objectives going in ("If this meeting goes well, what will these managers be saying, thinking and feeling differently?"). Have an agenda and be prepared for interruptions. Ironically, the more organized you seem, the less likely you'll be interrupted. Aim at leaving them with possible suggested action plans - this does not have to be fully fleshed out at this time, but does have to be credible. You might trial-run any critical executive communications with your mentor (who is hopefully part of your target group).

During your presentation:

- Thank them for allocating time to the meeting.
- Applaud successes from the safety program ("Your providing resources was critical to our achieving these positive results").
- Give them the big picture with few details - tell them how it affects overall current organizational objectives, rather than how it just affects safety programming.
- Employ a template to keep you and them on track. One I've used is: a. state the problem and its costs b. what we've tried and to what degree it's worked/hasn't worked c. what others/competitors are doing about this problem d. the potential opportunities/benefits e. optional approaches f. what I'd recommend and why.
- During the presentation, give them an opportunity to ask questions ("This might be a good time to stop to see if you have any questions you'd like me to respond to.").
- Give them control by providing options ("At this point, to simultaneously reduce costs and boost involvement, it seems to me we can either do A or B. In which are you interested?").
- In a longer meeting, stop and ask what they would like to hear ("At this point, would you prefer to know more about the proposed new system's goals or for me to cover expected ROI?")
- Close by inviting them to contact you for more information (or for any other reason) and thank them for their time.

Presentations are high-exposure times for reaching many decision-makers at once, enlisting the power of peer dynamics and energizing a group of leaders. By preparing yourself to succeed in executive presentations, you can help catalyze significant improvements in safety culture and performance.

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