

Preparing and Presenting to Executives



PMI MONTGOMERY

7/8/2010

SHELLEY ATWELL-VASKO, PMP

Opening Questions



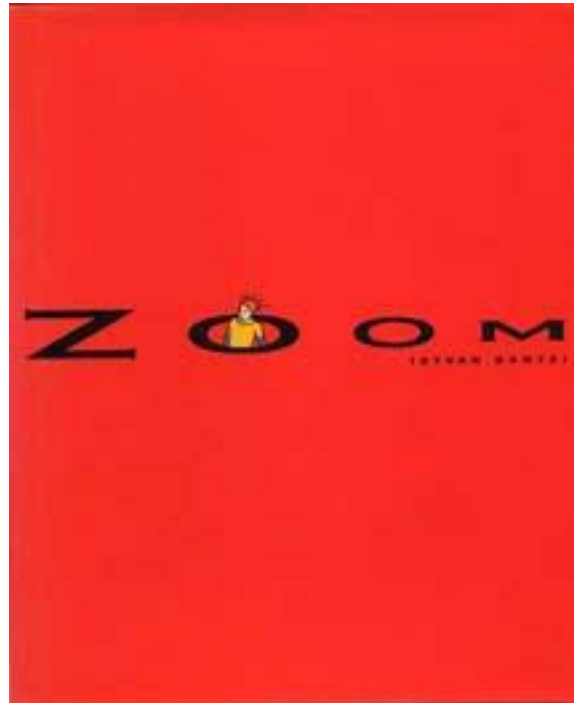
- Do you recognize a trend related to a lack of time in the work day?
- Does your project executive serve dually as a working team member?
- What should we communicate to our executives?
- What do our executives need or want to know?
- Are there actions to be taken by the executive(s)?
- What is the impact of that action?

Presentation Overview



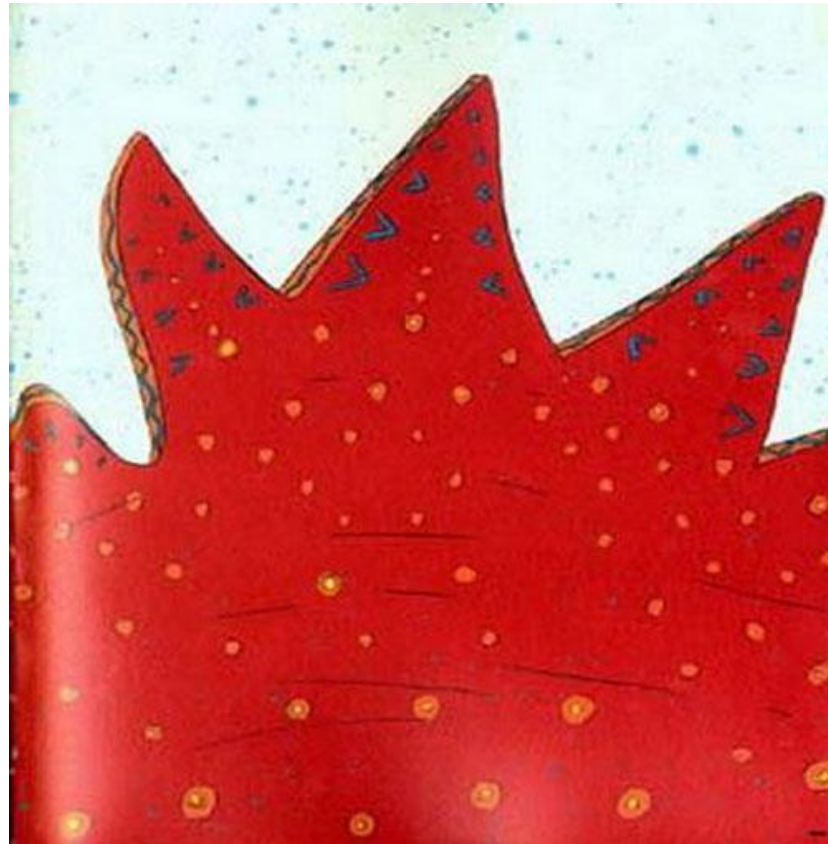
- Many project managers struggle with what to say to their project executives
- This topic will address the following with specific regard to preparing and presenting to executives, the Who, What, When, Where, Why, and How
 - One on One Updates
 - Steering Committee Protocol
 - Lessons Learned
 - Written Communication
 - Verbal Communication

Zoom



By Istvan Banyai

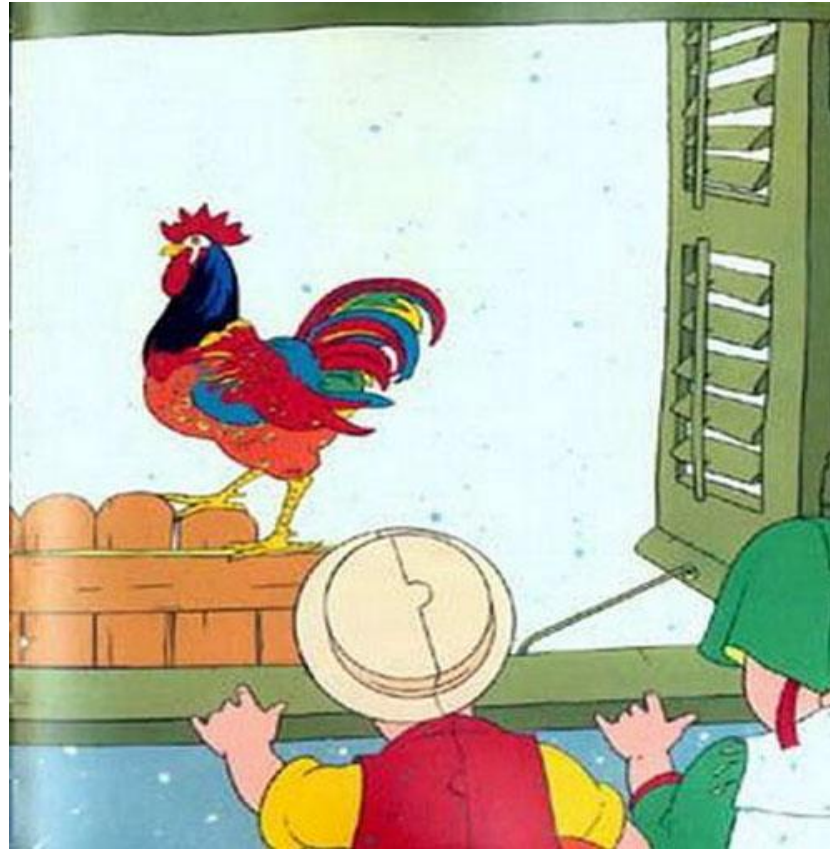
Zoom – Page 1



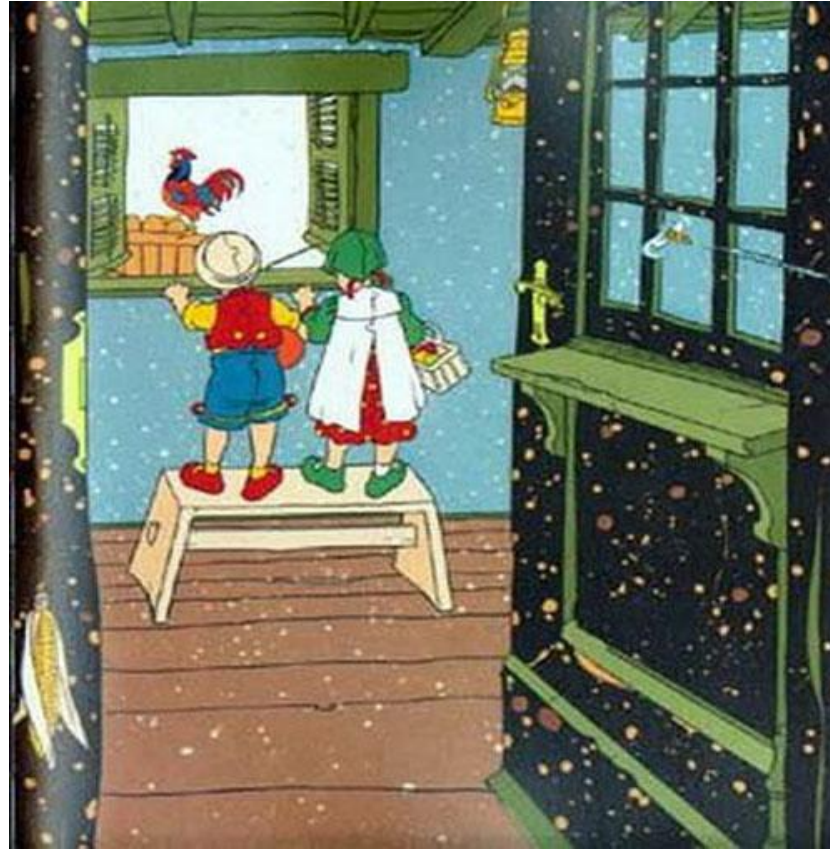
Zoom – Page 2



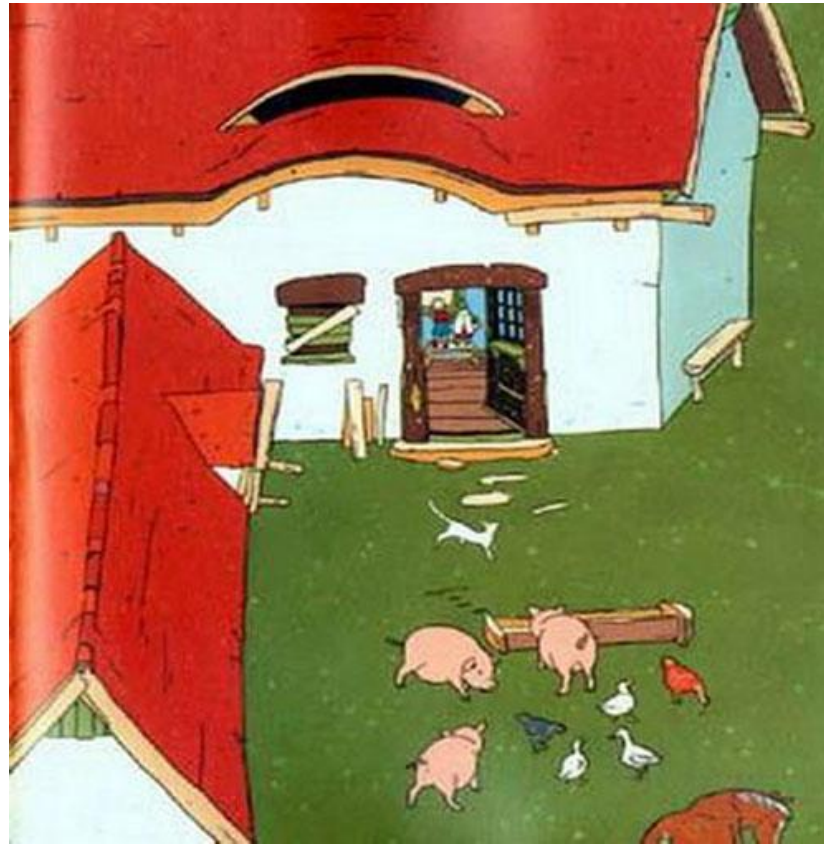
Zoom – Page 3



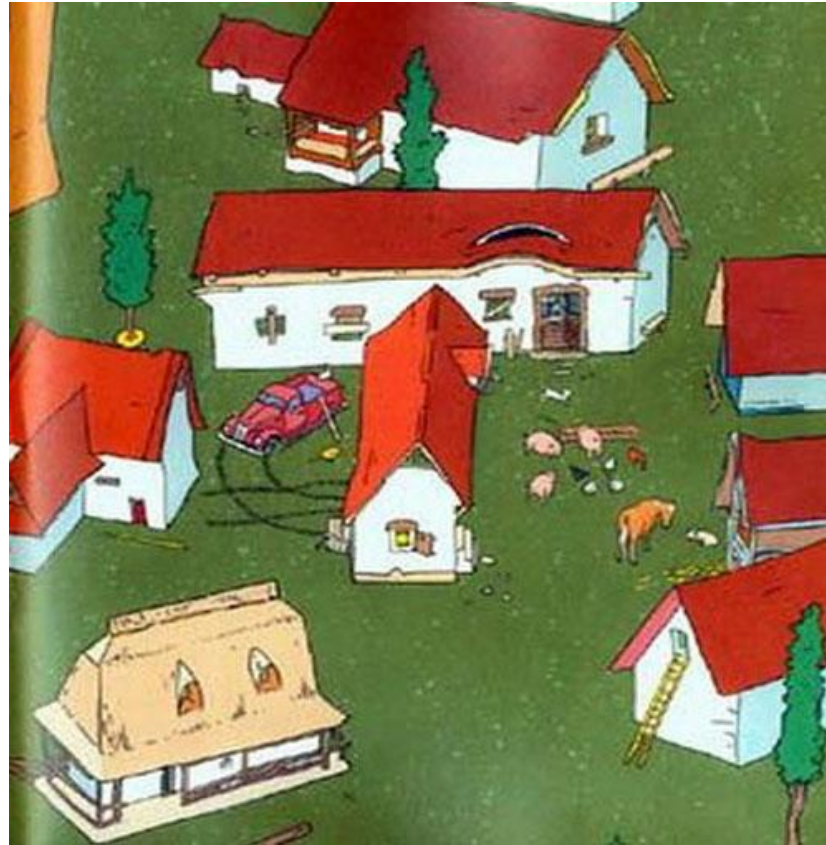
Zoom – Page 4



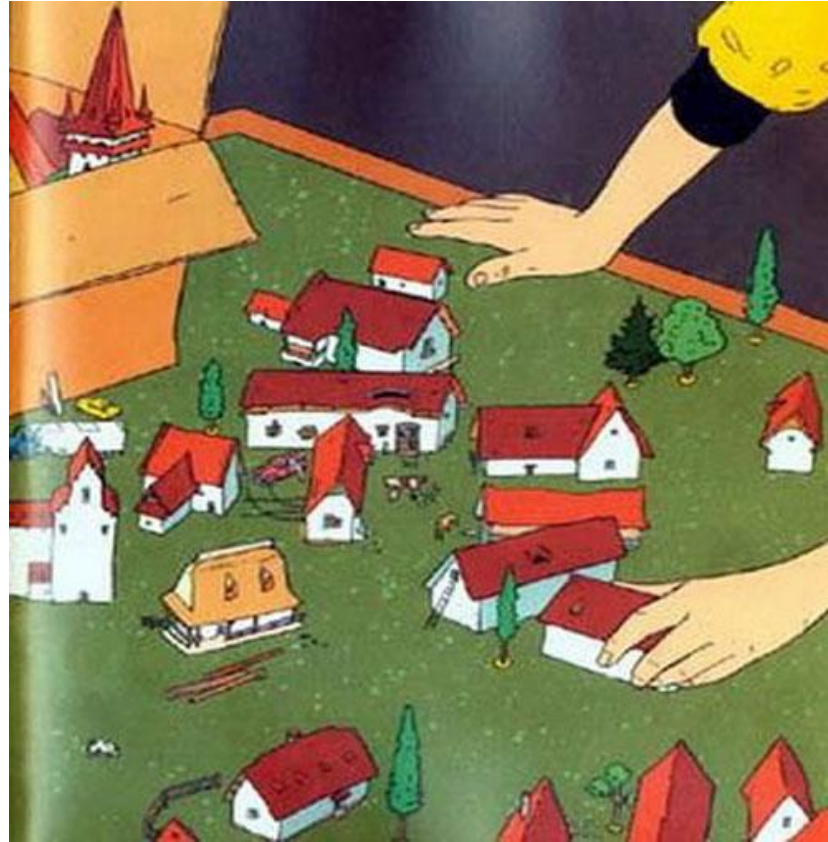
Zoom – Page 5



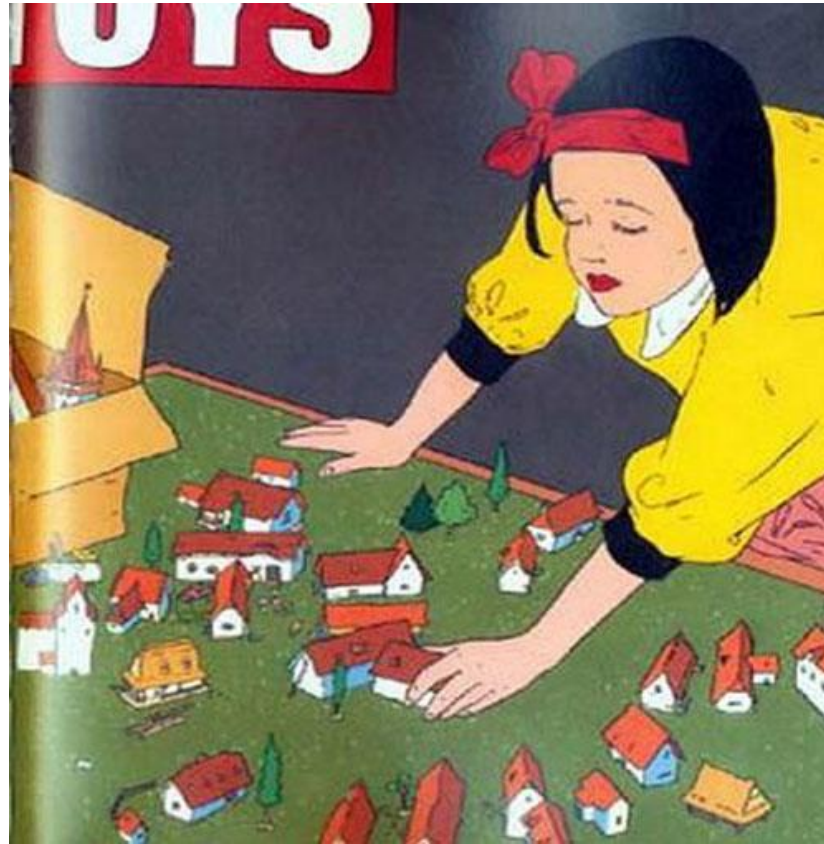
Zoom – Page 6



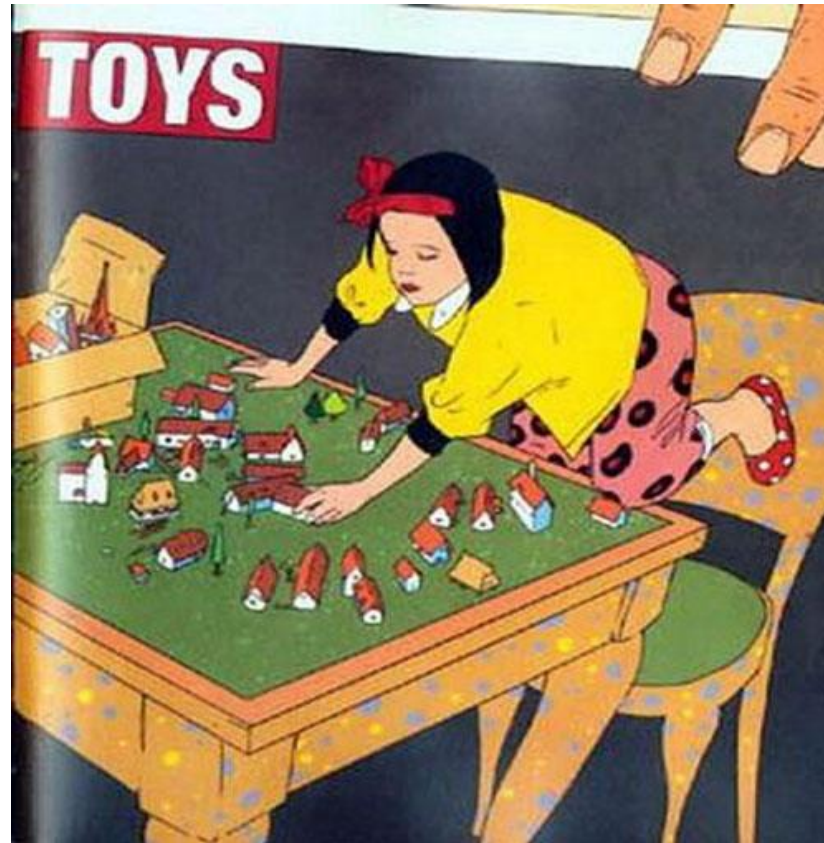
Zoom – Page 7



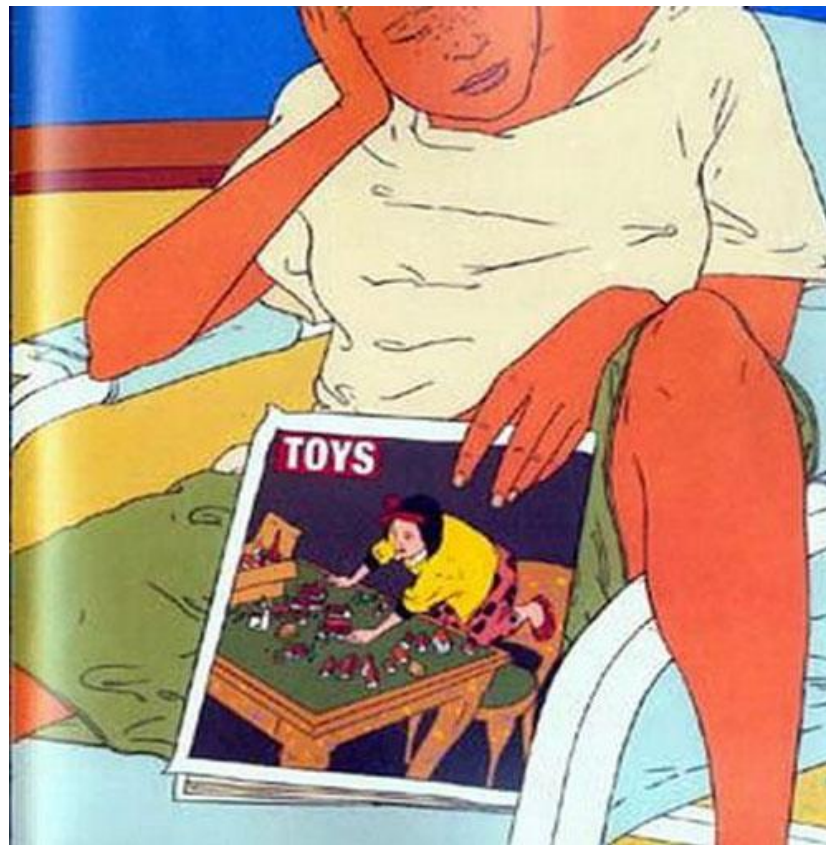
Zoom – Page 8



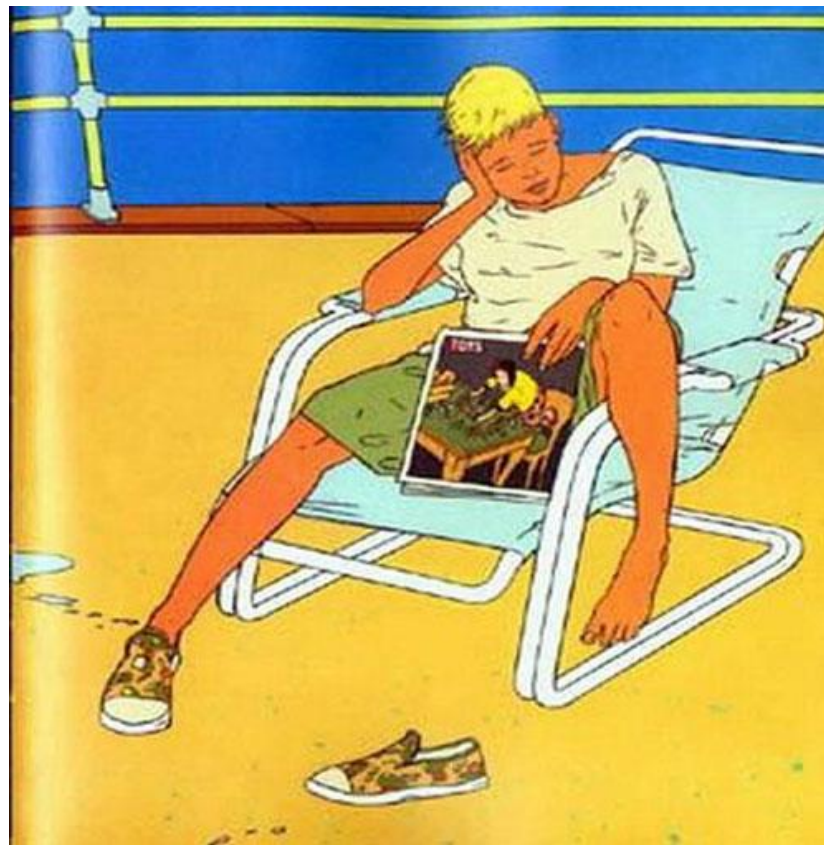
Zoom – Page 9



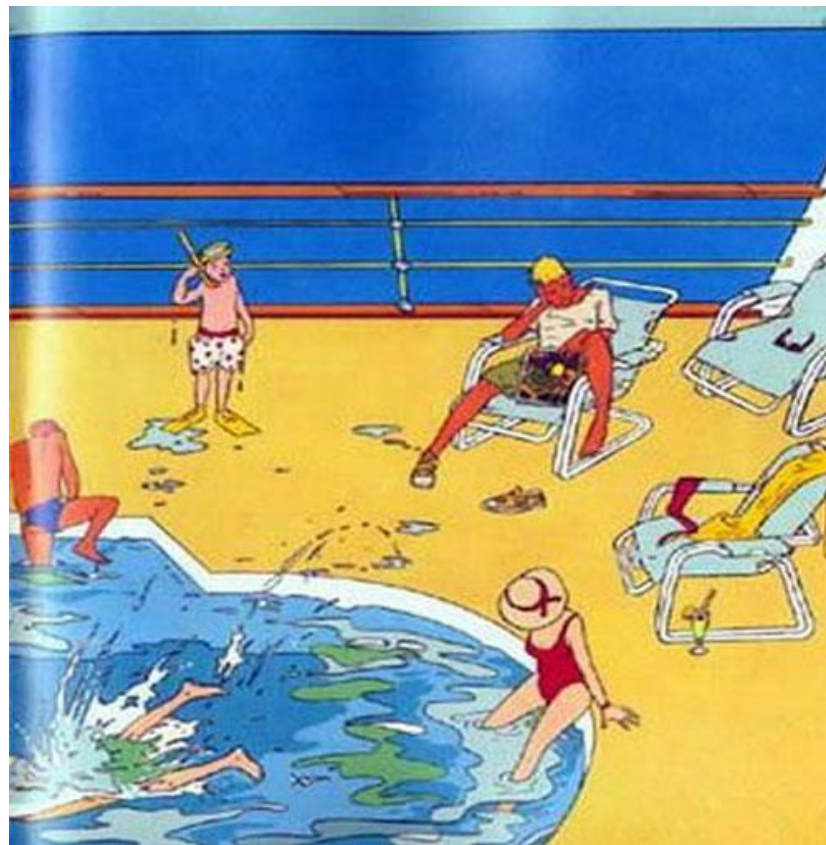
Zoom – Page 10



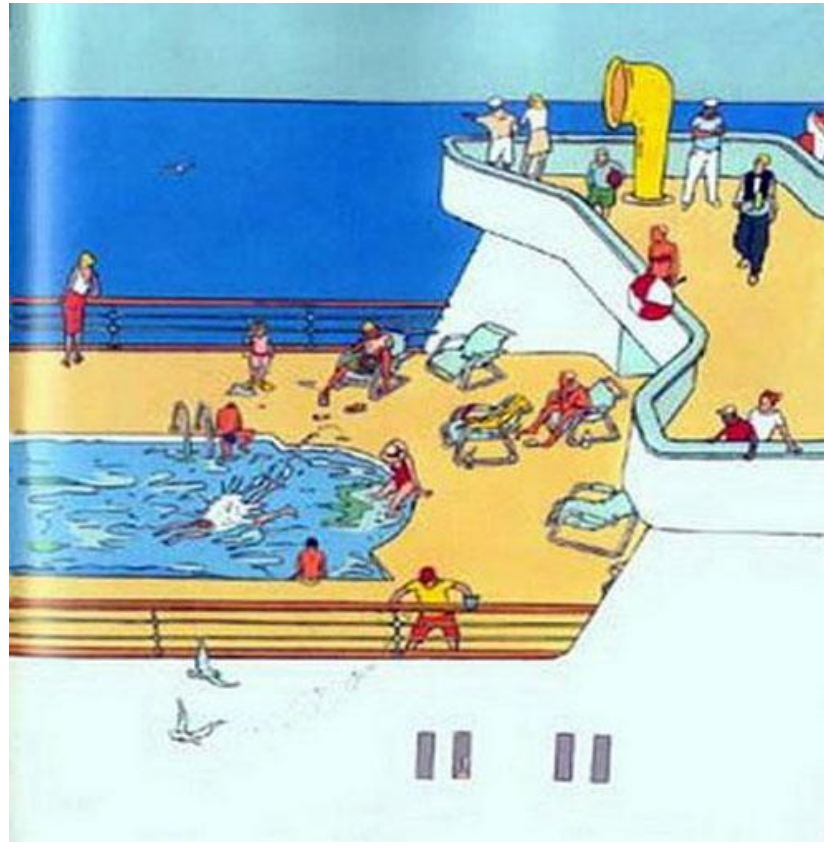
Zoom – Page 11



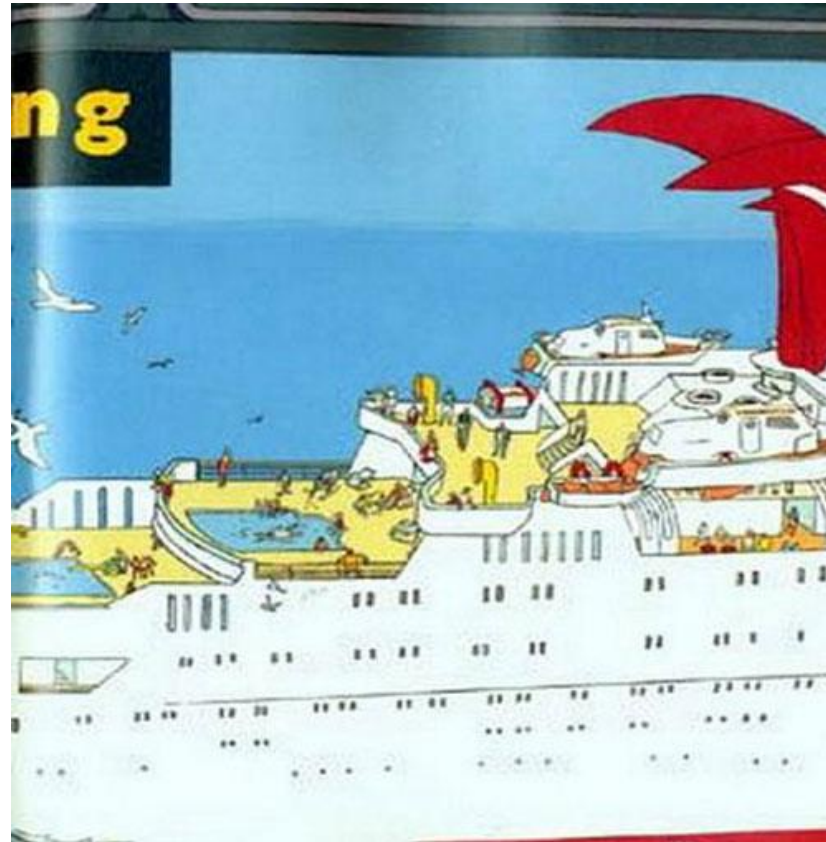
Zoom – Page 12



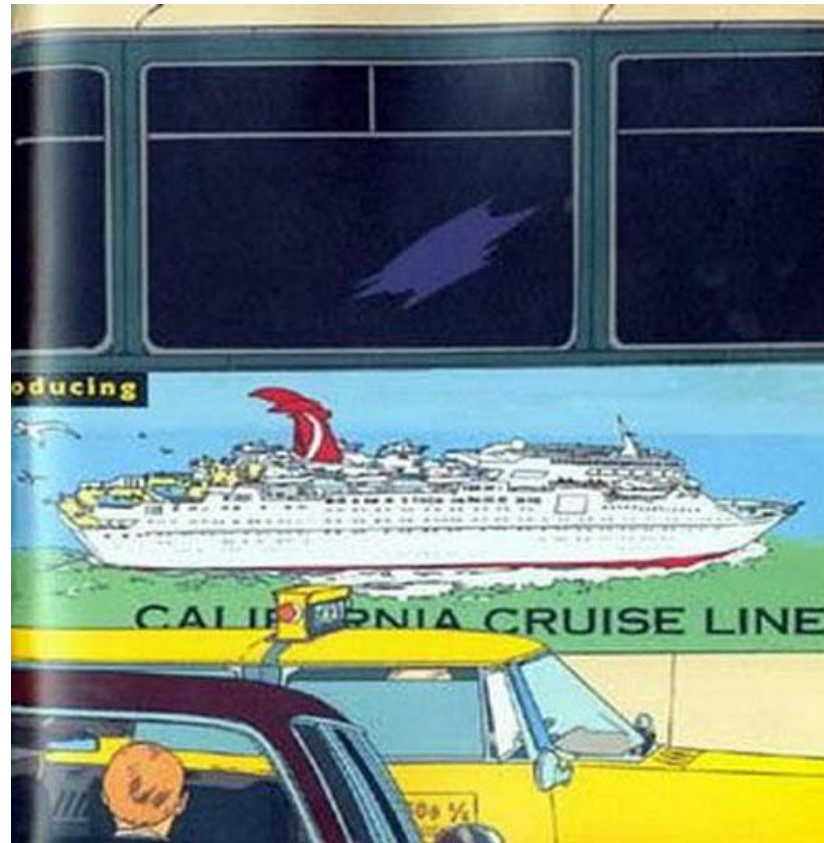
Zoom – Page 13



Zoom – Page 14



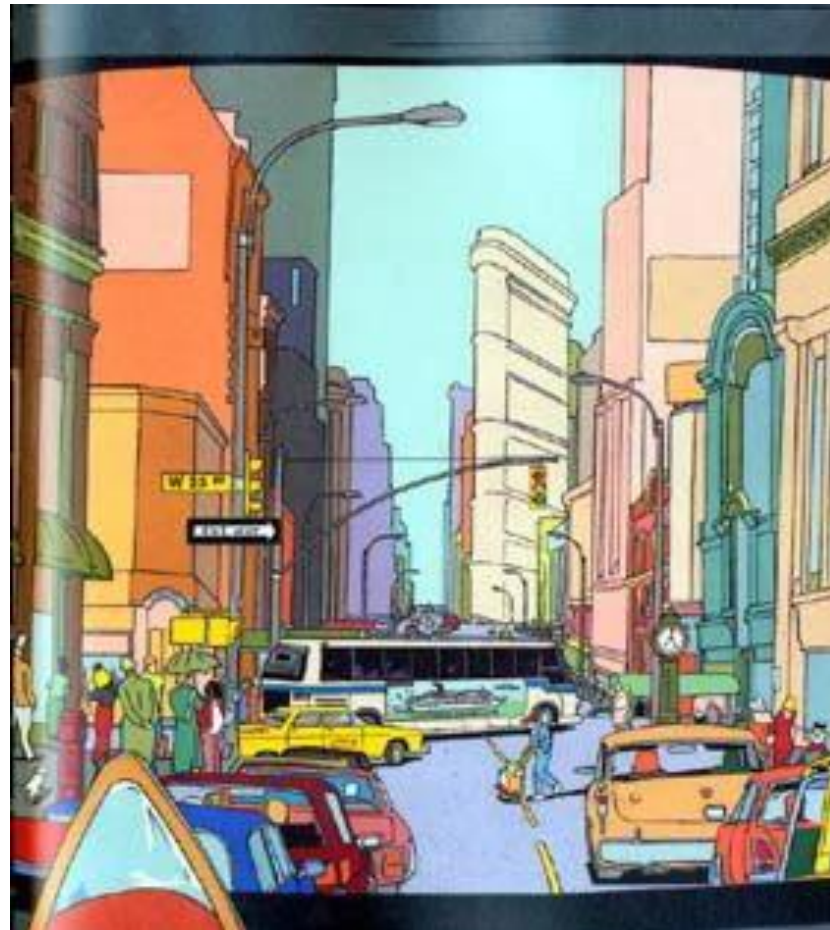
Zoom – Page 15



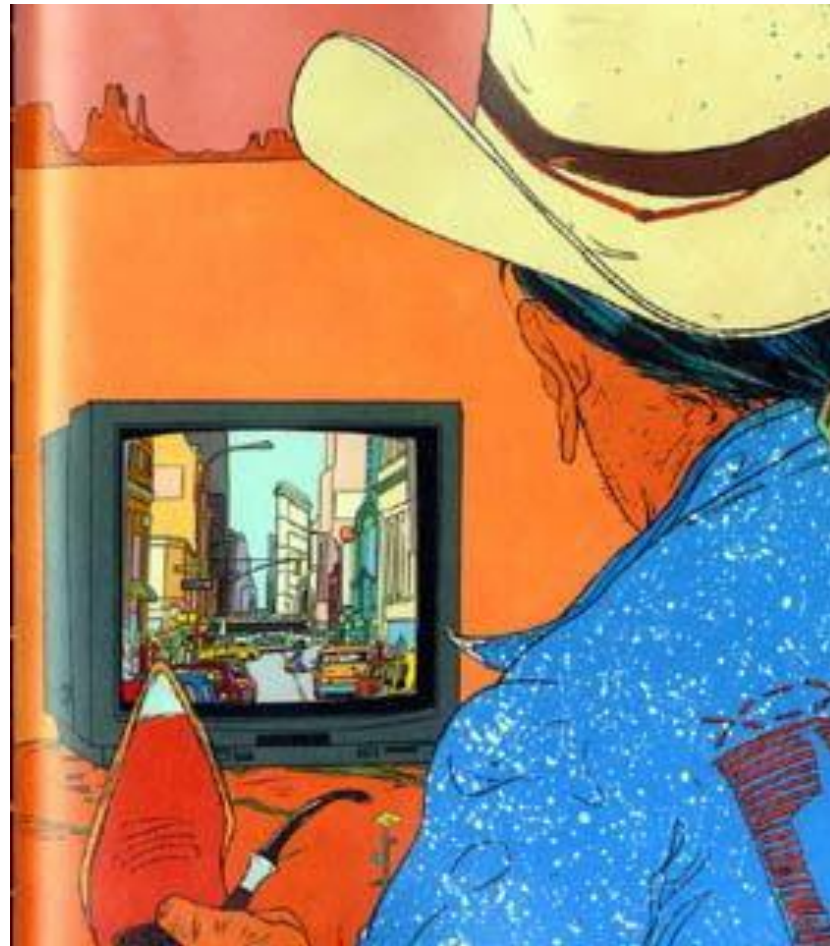
Zoom – Page 16



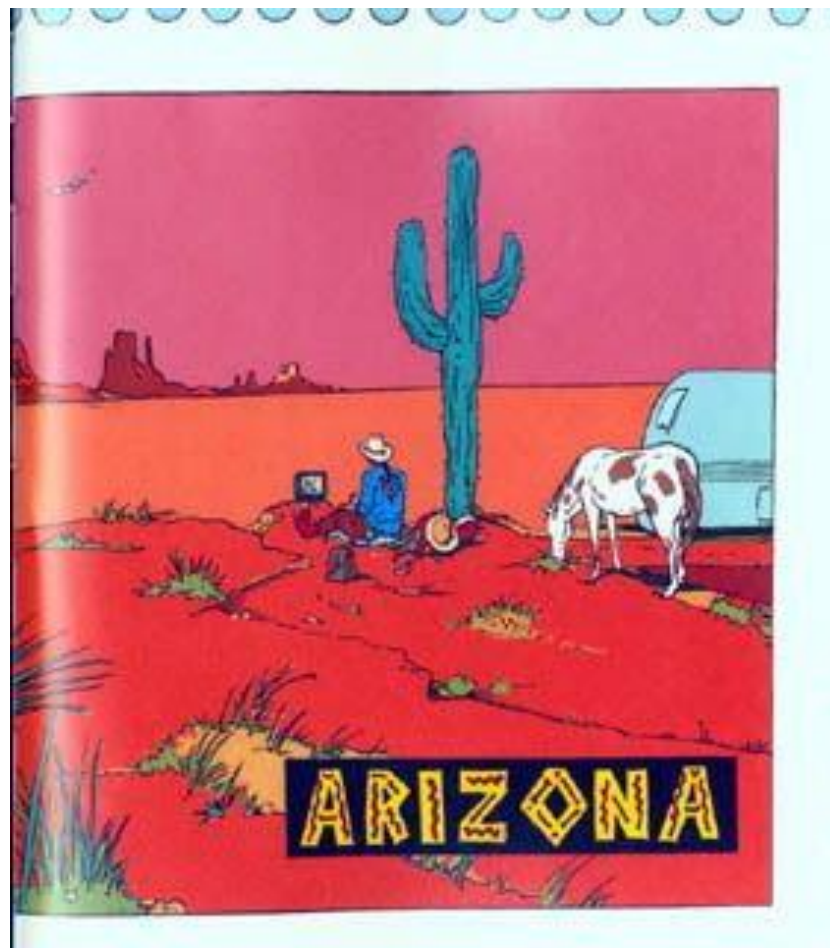
Zoom – Page 17



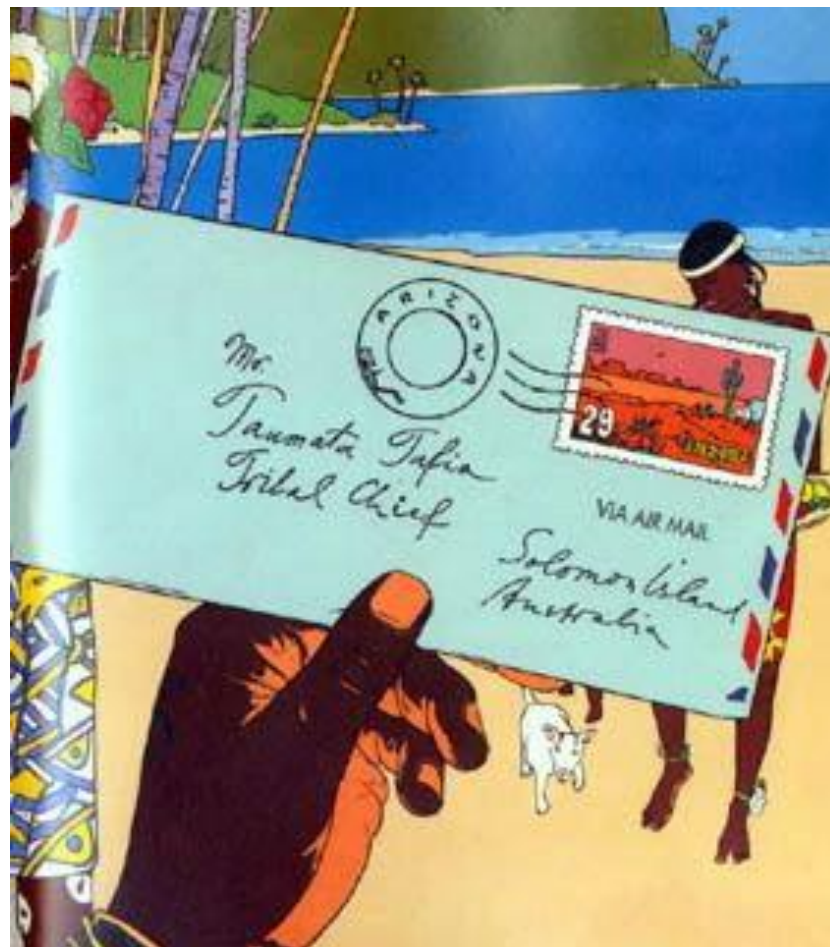
Zoom – Page 18



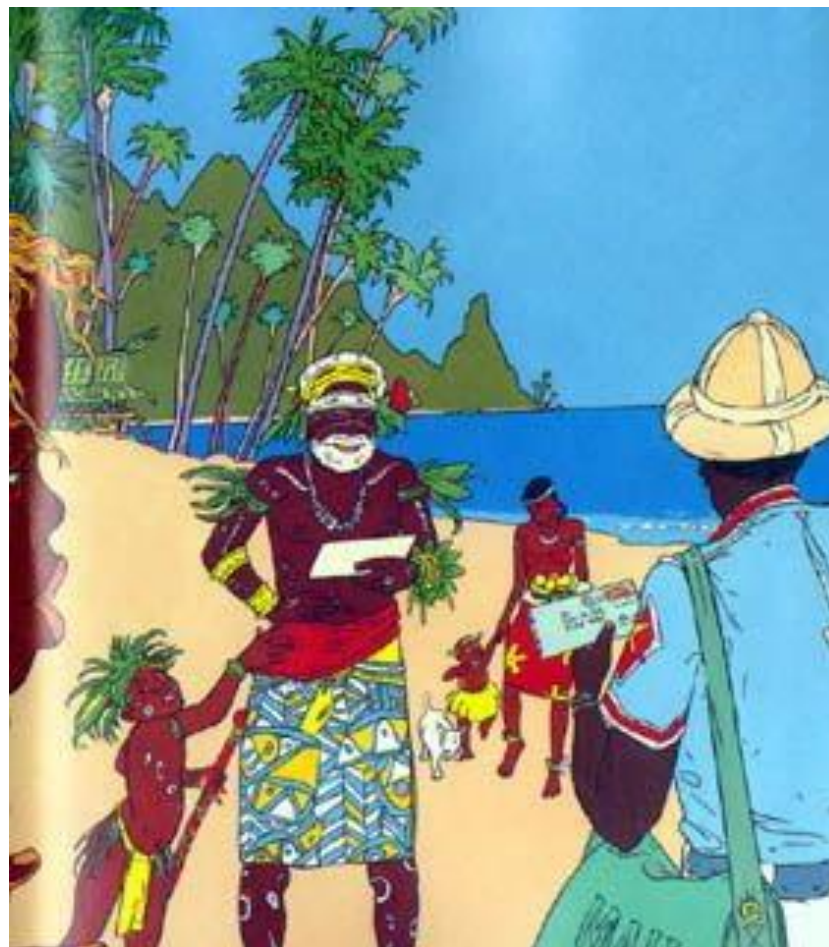
Zoom – Page 19



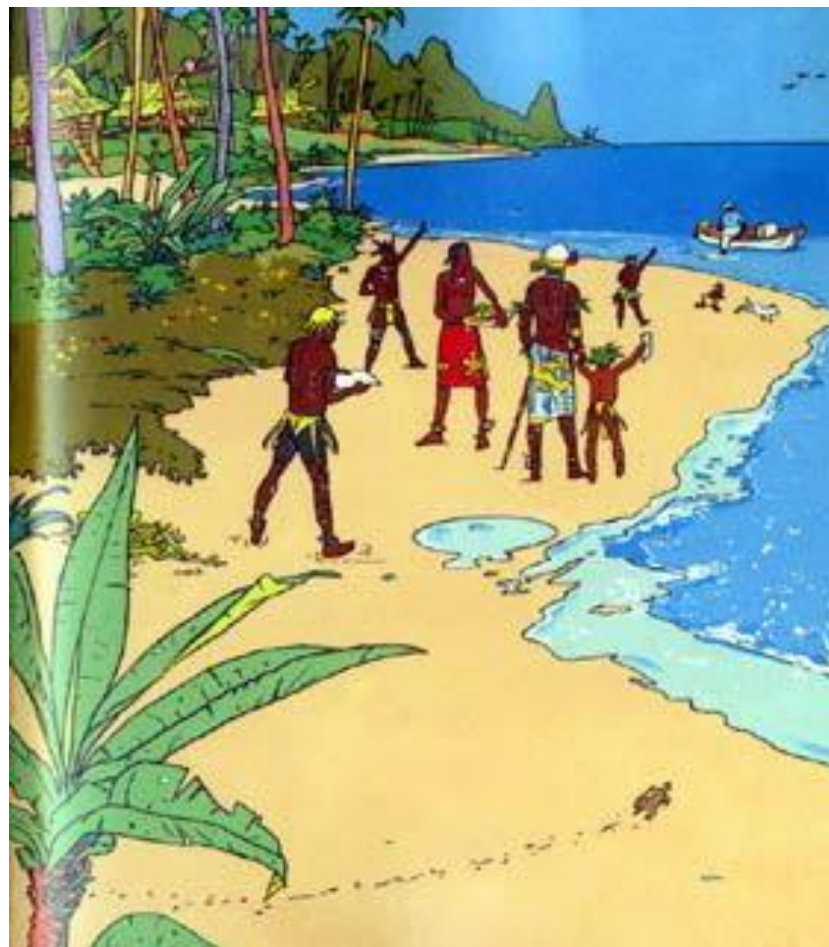
Zoom – Page 20



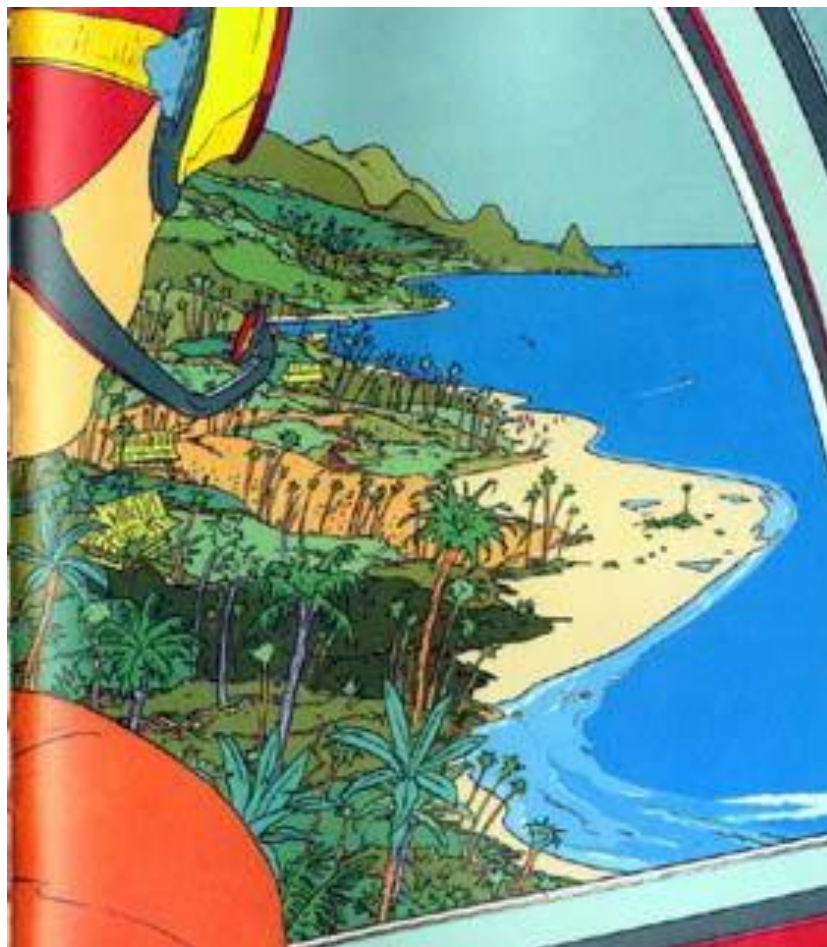
Zoom – Page 21



Zoom – Page 22



Zoom – Page 23



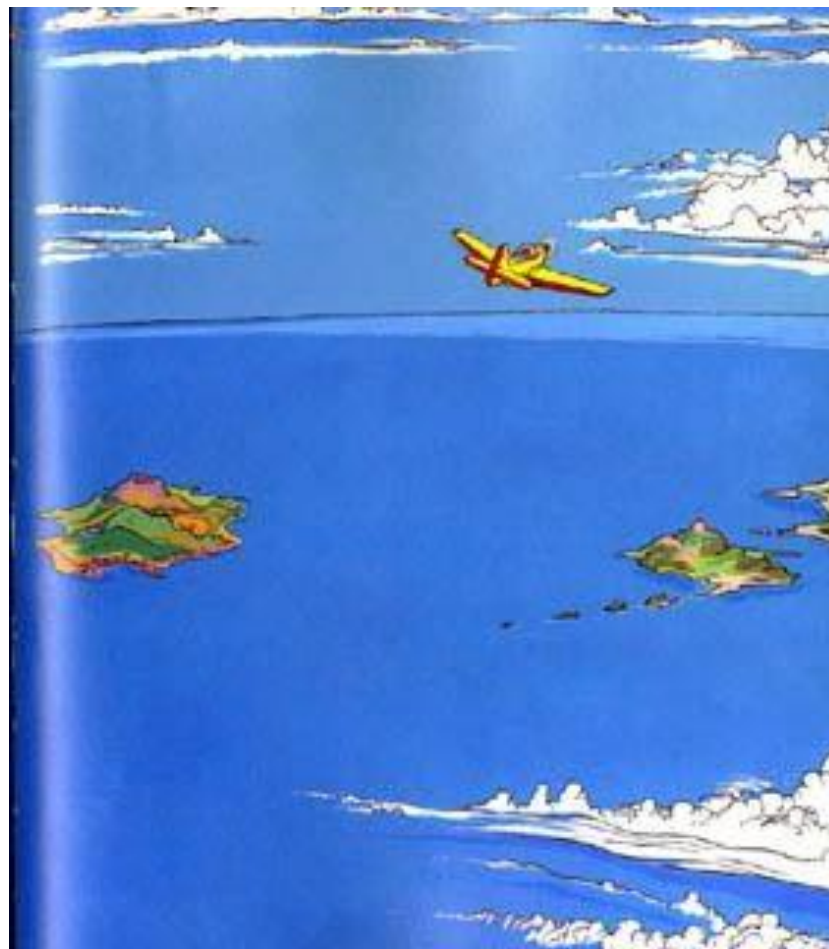
Zoom – Page 24



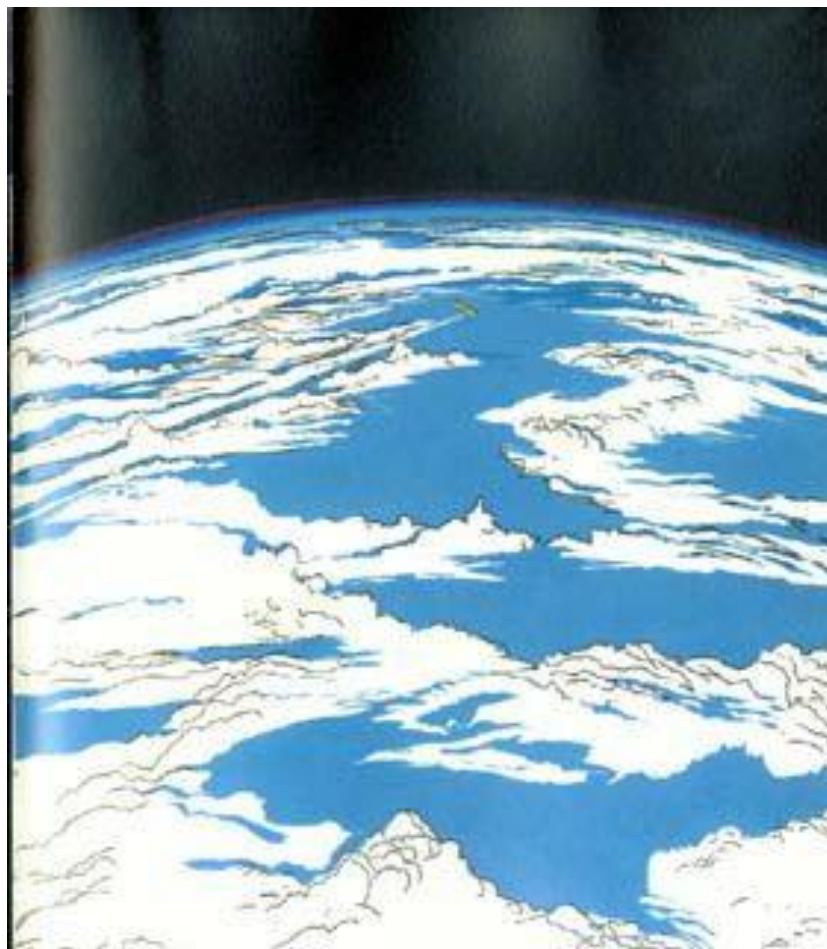
Zoom – Page 25



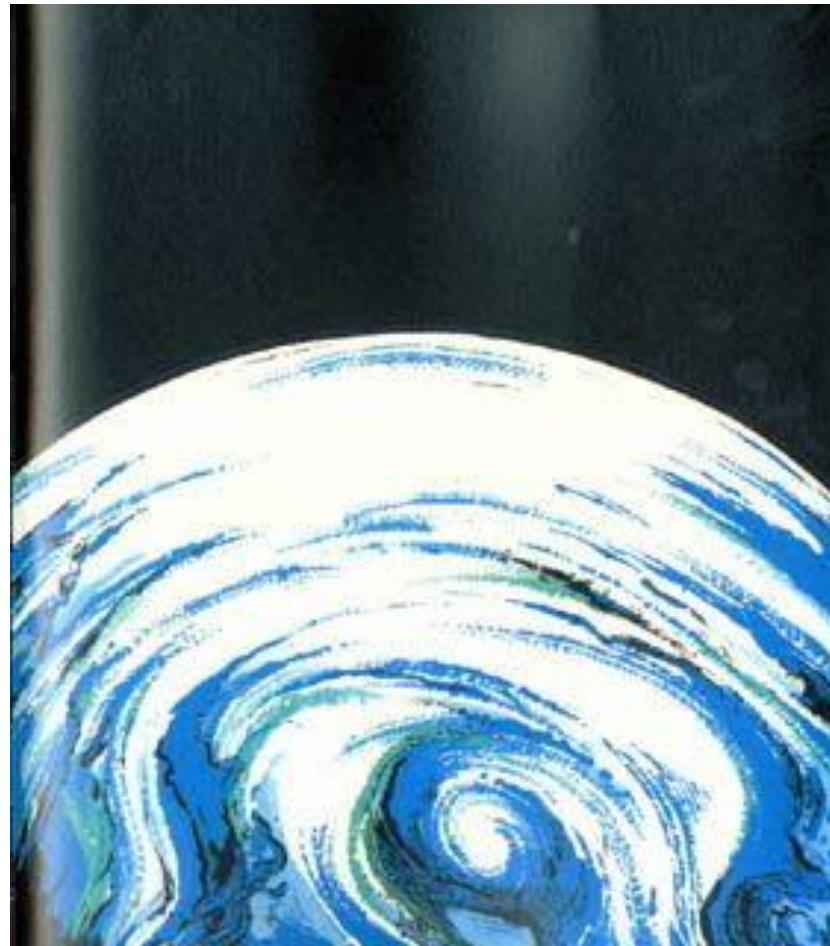
Zoom – Page 26



Zoom – Page 27



Zoom – Page 28



Zoom – Page 29



Zoom – Page 30



Who



- Who will receive the communication?
 - Project Executive
 - Project Stakeholders
 - Executive Steering Committee
 - Management Chain
 - Mixed Group of Executives

“I cannot give you
a formula for success,
but I can give you the
formula for failure:
try to please everybody.”

-- *Herbert Swope*

Why



- What is the purpose of the communication?
 - Accomplishment
 - Major Milestone Reached
 - Standing Status Meeting
 - Escalation Required
 - Needed Response or Action

Where



- Where will the communication occur?
 - Weekly Meeting
 - Escalation Meeting
 - Status Meeting
 - Executive or Advisory Meeting
 - Executive Steering Committee Meeting

Steering Committee



- Are you looking for a decision?
 - Provide Tools
 - Provide Impact of Decision
 - Provide Sufficient Details for Informed Decision

“One of life’s most painful moments
comes when we must admit
that we didn’t do our homework,
that we are not prepared.”

-- *Merlin Olsen*

1:1 Executive Update



- Plan your conversation
- Prepare an Outline
- Determine Top 3 Issues or Topics
- Be Prepared to Expound
- Prioritize What Absolutely Must be Communicated

Status Update



- Project Schedule Status
- Project Status Indicator (Green, Yellow, Red)
- Budget Status
- What Details being Closely Watched for Change
- Unforeseen Occurrences that could Change Status
- Upcoming Major Milestones
- Suggestions for Improvement
- Any Possible Concerns

“We cannot direct the wind ...
but we can adjust the sails.”

-- Author Unknown

Escalation Update



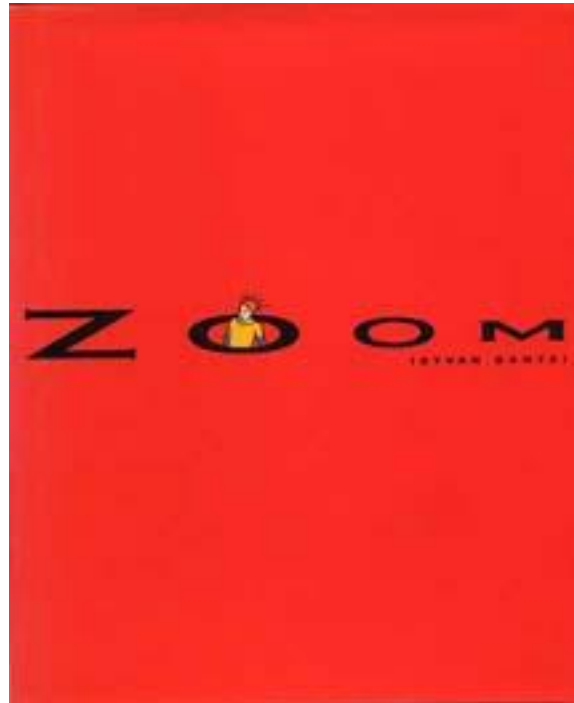
- Project Issue
- Factors of Issue – include the major milestones, code deliveries, or other tasks that are responsible for the change.
- Project Impact
- Mitigating Actions Taken
- Suggested Actions for Further Mitigation, if any exist

How



- How will the communication be delivered?
 - Verbal
 - Email
 - Presentation

Zoom



The 30,000 Foot View

“The best executive is the one who has
sense enough to pick good men
to do what he wants done,
and self-restraint enough to keep
from meddling with them
while they do it.”

-- Author Unknown

Executive Update Tips



- Provide Big Picture View
- Be Prepared to Provide Additional Details
- Practice Presentation Prior to Delivery
- Only Provide the What, Never the How
- Know What You are Presenting, or Provide a SME
- Be Positive and Flexible
- Respond to Body Language
- Pause Between Topics
- Know the Issues to Avoid and Politics

Executive Update Tips – Continued



- Present Only the Findings, Not How they were Determined
- Assume Supporting Details will be Requested, Have Readily Available
- Be Clear and Concise
- Make Eye Contact
- Provide Insight, Not Information
- Use Graphics to Help to Support Details
- Keep Presentation Clear and Simple with Details Obvious
- Repeat for Added Focus
- Change Topics When Interest Fades

Executive Update Tips – Continued



- Include Page Numbers
- Provide Topics of Interest to All Groups in Attendance
- Ensure Escalations Occur Prior to Meetings
- Focus on What, not How
- Use Company Terminology
- Show Measurements Graphically
- Be Prepared to Provide High Level Timelines
- Provide a SME for Topics Outside of your own expertise
- Smile and Breathe

Executive Update Tips – Continued



- Remember Vertical Communication may Result
- Ensure Presentation Stands on its Own
- Do Not Read Slides Word for Word to Audience
- If a Correction to a Comment is Required, provide it
- Have Respect for your Executives
- At the end of Writing a Presentation, Ask Yourself:
 - Does the document stand alone?
 - Does it require explanation?
 - Does it tell the entire story?
 - Does it leave you with the question “So what?” or “What does it mean?”
 - Does it include personal opinion?

When



- When Should the Main Topic be Communicated?
 - Deliver a summary near the beginning of the communication
 - Afterward, Provide Supporting Details

Email Update Tips



- Include a powerful subject line
- Limit the content to 7 or less bullet points
- If action is required, make it clear, state it last
- If no action is required, state it
- If the communication is a notification, state the problem, impact, and mitigating steps taken
- Read the message objectively
- Proofread, and proofread again

Summary



- State the Problem
- Solution
- Benefits
- Alternatives
- Drawbacks
- Limitations and Risks
- Costs
- Short and Long Term Expectations

“Experience is the name
everyone gives
to their mistakes.”

-- *Oscar Wilde*

Q&A



?