



# Effectively Communicating with Senior Executives

A Special Presentation for HR Tampa  
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Presented by  
Barry L. Brown, SPHR, CCP  
Effective Resources, Inc.



## Yes, it is different ...

- Communicating with senior executives is definitely different than with your peers, vendors, or supervisors
  - Their time and attention span is shorter
  - Their focus is on the bottom line
- Your ability to think on your feet has to be in top shape
- You must speak the language of management



## Don't do it with senior execs ...

- Don't try to impress them with your command of PowerPoint transitions, animations, etc.
  - Keep it simple, meaningful, elegant
- Don't try to impress them with your vocabulary – or HR buzz words
  - Use words they understand
- Don't bore senior execs with how difficult it was for you to get the information
  - They don't really care ... it's your job!



## Adapt your style ...

- For groups, adapt to the audience with high-level overview and details where necessary
  - Consider preparing details ahead of time and have ready to distribute, if requested
- For individuals, you may customize the presentation to exactly how the exec prefers to see things, e.g., macro level to the micro
- Keep presentation simple with supporting info at the ready



## Types of presentations ...

- Just to be clear, when we're talking about "presentation," it doesn't necessarily mean "PowerPoint"
- Presentations may be slides or written
- Both types of presentations should follow similar flow and logical progression
- Build a good foundation first and go from there



## Present in “index” style ...

- Start off with the agenda to discuss or the objectives of the project: : why, what, costs, ROI, timeline, tracking and reporting
- Hit the high points (executive summary)
- Go through the major areas
- Have details and/or supporting info available for those execs who want the details
  - Hidden slides in PowerPoint work well
  - Documents, data ready for distribution if needed



# Speak management's language ...

- Simply put, management's language is money
- When presenting *savings*, be sure to convert to *top-line revenue* using profit margin
  - Example: Assume you have calculated a \$100,000 annual savings by reducing turnover 5%.
    - If you don't already know the company's profit margin (and you should), ask the CFO
    - Divide the estimated savings by profit margin, e.g., 5%
  - \$100,000 savings becomes \$2,000,000 in sales!
  - Option: convert savings to the number of units sold, built, designed, etc.



## Do your research ...

- Anticipate questions or concerns and prepare accordingly
- For internally sensitive information, go to the experts, e.g., CFO, CIO, SVP of Whatever
  - Your credibility will go up a notch just for recognizing them as an expert and asking for their advice and input
- When possible, use (and cite) resources your execs already recognize and trust





## Be precise ...

- To give the sense of being exact with your calculations, use at least one decimal point with percentages
- Keep spreadsheets and charts “cleaner” by rounding dollars to nearest practical point, e.g., thousand, ten thousand, million
  - Excel can do this automatically for you using the “round” formula `=round([cell],-3)` for 000’s
  - Use the types of number formats the execs use
- Know how to calculate percentages
  - Two percentage points is much different than 2%



## Be clear ...

- It's OK to use estimates, but give a range:
  - \$385 Million plus or minus 2%
  - June 1 plus or minus 1 week
  - NLT (not later than) Sept 15
  - 6% plus or minus 0.2%
- Minimize the use of these words as they may mean something *unintended* to the execs:
  - About, nearly, almost, close, should be, might



## Summarize ...

- Summarize the high points
- Identify next steps – and a timeline
- If there has been discussion and there are action items, review who has the action, what it is, and when it's due
- Ask for questions or concerns
- Don't be afraid to say, "I don't know."



# Track, report, update ...

- Track action items, next steps, important dates, etc.
- Report (even without being asked!) on progress or setbacks
  - Don't report a setback without providing a workaround solution
  - Don't report a workaround solution without an updated impact to timeline and costs
- Update your information



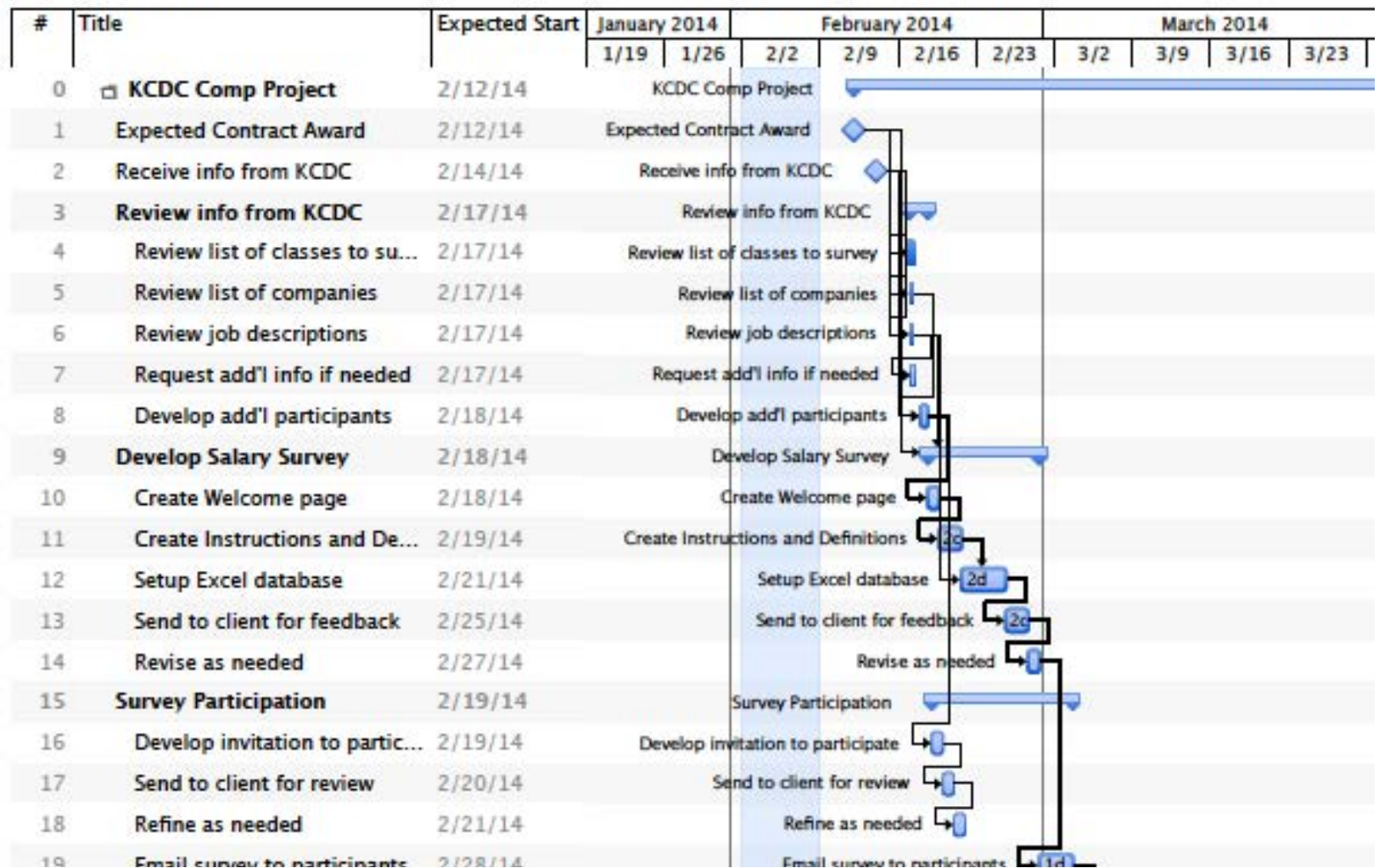
## Enhance your credibility ...

- Understand how to read the financials
- Learn how to use whatever tracking mechanism the execs use, e.g., Microsoft Project<sup>®</sup>, Merlin<sup>®</sup>, or similar
  - Use Gantt charts to graphically show progress

# Gantt Chart ...

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Work Breakdown Structure for KCDC





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  - Use Gantt charts to graphically show progress
- Anticipate needs and develop action plans
- Make sure your presentations are of the same or better quality than others in the Boardroom



## Assess, refine, repeat ...

- Always welcome feedback and comments
- Always be on the lookout for ways you can improve your communications with a given exec ... *their assistants are a great resource*
- Work on improving your estimates
- Work on improving your function's value
- Anticipate, ask questions, prepare
- Translate *everything* to dollars-and-cents



# Questions ?





# Effective Resources, Inc.

Barry L. Brown, SPHR, CCP

(800) 288-6044 Toll Free

[Barry@EffectiveResources.com](mailto:Barry@EffectiveResources.com)

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