

WINNING INTEREST, SECURING SUPPORT: KEEPING THE BOSS ON BOARD

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How many times has it happened? You got a mission: A CI research project due in 60 days (or five, if you're unlucky). You went to work with few resources and less time, but you knew what the boss wanted . . . and you found it! In a pure stroke of genius (OK, and lots of luck) you got the answer on time.

Just before the deadline, you fired off your email: a carefully crafted five line response, with a perfectly tuned five page slide summary, followed by five more pages of narrative text attached, including important implications. You called the boss – she's in a meeting. You left a message. You waited. The boss didn't call. You waited some more.



Arctic silence descended. After a week, the chill is so bad you can't stand it any longer, so you *manage* to be in the marble hallways of the head-shed at just the right moment – and you see the boss. “How was the report?” you ask. Her brow furrows for a moment as she thinks back. Then she remembers. “Your report? Yes, it was good background.”

Instantly you know you're in trouble. Background? People don't retain CI analysts because they generate “good background.” You thought you generated the answer, not aids for winning in a business equivalent of trivial pursuit.

WHAT'S THE PROBLEM HERE?

Let's start with everyone's assumptions. First, let's talk about yours. You assumed you understood the problem. That assumption seemed well founded. Your boss explained the need. You asked why she needed the information. She told you. You used your best *active listening* skills to get the details of what she wanted, repeating back what you heard. The boss agreed with your re-phrasal – and you were off like a shot.

The first problem may be that you delivered what the boss needed then, not what she needs now. Her needs shifted while you worked the project.

She didn't tell you this, of course. She didn't even realize that her needs had changed – all she remembered was that you were off getting her what she needed. Her palpable disappointment with your results is understandable. You simply couldn't meet her changing expectations. You perfectly answered the question she started with, but not the new questions she'd since developed,

and thought she asked you in the first place.

FINDING THE ANSWER

Now let's talk about your boss's assumptions. You asked her all the right business-oriented questions at the outset – what she needed the information for, how she would use it (the five why's, the how's). But maybe you didn't ask her the most important questions, which are a bit more sensitive and political, such as: What do you think we'll find?

She likely has her own idea of what you'll come up with. Most top managers are like good attorneys – they never ask questions unless they think they already know the answer. Goodness, someone might think they really don't have the answer!

WHY WAS THE QUESTION ASKED?

Worse yet, your boss may not have shared with you her expectations about how you'll do the project, including:

- data sources you'll use
- how you'll use them
- what analysis you'll do
- how you'll format the finished report.

As a last straw, she may not have given you the most sensitive information of all: whom the project is really for, and the real internal, political reason for seeking the information.

This gets dicey. Maybe you can't just ask all the questions you want, but you've got an urgent need to clearly picture what the boss thinks your report

will look like in content, format, and even your approach to collection, analysis, and production. And then you've got to have a razor sharp picture of who the real consumer is and what the politics are, not just the ostensible business purpose for the research.

that keeps you in touch with her changing views all the way to the finish line. You also need to take a page from your favorite information consultants: ***Never start a project unless the information, the output requirements, and the deadline are codified in writing***



CREATING A CONTRACT

A war story might help. In early 1996, I arrived in Atlanta to do competitive analysis for BellSouth. In the first day on the job, I met two vice presidents of BellSouth's largest subsidiary. In four minutes, they outlined the information they urgently needed to support a strategic planning project, and gave me a deadline for getting it to them.

Going directly to my computer, I outlined the assigned project. At the top of a 1.5 page document, I captured the request's originators, the

deadline, and the general subject. The next paragraphs were crucial. They included:

Background and intended use:

Two short paragraphs that outlined the general market circumstances and the specific decision requirement behind the information request.

Request for information:

This paragraph had four short subparagraphs:

- my restatement of the basic requirement, as I understood it
- a careful explanation of the basic requirements statement, outlining elements of information I thought would be both necessary and sufficient to validate the assumptions the executives were making

- two *implications* paragraphs, capturing the implications my requestors expected would arise if their assumptions were true
- satisfaction and deliverables section described what I felt were the largest constraints on the project: I didn't think we'd get enough about at least one target company before the project fell due and why I believed that; the methods and types of sources I intended to use; and what I planned the deliverable to be (text report, single page summary with up to two page backup, source and credibility references in the footnotes.)

The fundamental purpose of this exercise was to frame a contract between myself and my taskers. I immediately sent both managers a copy of my new *requirements* document, and followed up with phone calls.

I heard back from one immediately. He corrected my underlying assumptions, asked questions about my sources and methods, and adjusted the

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format of my proposed deliverable. The other one didn't respond.

KEEPING IN TOUCH

As time went on, I attempted to maintain contact with both managers at pre-set points. I had indicated that I expected to deliver a draft report about 15 days before the project was through. When I delivered the draft, one vice president – the same one who responded previously – gave further guidance, and asked for a slight change

HOW THE UNIVERSE WORKS

As you learn what's really wanted, and for whom, you can help your boss deal with a reality that may be different than she expected. This is hard, and it's not really a sales job.

The truth is, your boss has her own perceptions about how the universe works. Maybe you've got the insight of a Copernicus, but to the big cheese, the stars still all orbit around her. The only way she'll ever see things differently is if she decides there's a need to do so.

Just giving her a picture of the real universe simply won't work. She'll think you made it up. Even your superior knowledge of intelligence sources and methods won't carry the day in the face of preset assumptions.

What can you do? Simply put, you must engage your boss in an explicit process that clarifies all the initial assumptions and politics at the start, and



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You can guess, of course, what happened as the due-date approached. Of the two requestors, I had carefully aligned my project work to address the needs and assumptions of only one. He felt that he'd had a hand in directing the project, although we'd actually only had four brief contacts (one in person, one by email, and two by phone – a total of about 15 minutes). He was confident in the research being done, and in the methods used to do it. The final draft was just what he expected to see.

The other requestor lived in outer space. Since the first request was made, his vision of his needs had substantially changed. Furthermore, he wanted a format dramatically different from what I planned to provide, and was piqued that his own pet data sources weren't considered.

(Think for a moment about your own competitive environment. Just where does your boss usually get her best information about what's going on out there? From you? If not, you'd better address those sources somewhere – or change her mind about their validity, or you may not be believed!)

In the end, we manipulated the final report to at least partially suit the needs of the *incommunicative* requestor. After the smoke cleared, one requestor was fully satisfied – but the other one

had lingering questions about how useful CI would be in the long run that took months to resolve.

BEING APPRECIATED

Here's a quick summary of what you can do to help ensure top brass appreciate your work:

Get advance agreement about

project details:

Business problem, target audience, office politics, report content, research and production methods, deadline, and format must all be addressed.

Be sure you both expect the same thing:

In terms of what you are doing, when, and what the results will look like.

Put it in writing (except for the politics!).

Get an agreement on what you've set out to do. This is your *contract*.

Set waypoints for coordination enroute to the finished product.

This is the best way to stay abreast of the requestor's (inevitably changing) requirements, and to avoid all-nighters.

If humanly possible, deliver the final product yourself.

Passing your information through your boss or mechanically via email attachment or the web just doesn't work if there are lingering doubts about your results or if they're at all different from what your ultimate client hoped they'd be.

Never sell your content – sell the process!

If you have too firm a stake in

whether or not your content is believed, you may not get a second chance for top-level access if somebody powerful disagrees with you. If, on the other hand, it is clear that you have a rigorous process for arriving at your conclusions, you will stand a better chance of winning the war even if you lose a battle here and there.

A final word of caution: no matter how good it is, your work is always

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better if your boss believes it was her own idea in the first place. The time you spend ensuring you understand and address core assumptions is worthwhile.

Your best reward may come from when they defend your research as their own – or change an assumption based on your careful, considerate coordination and discussion of the implications of your work. Don't worry – down deep, they'll know your full value, and will defend your right to make them a champion next time, too!

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