



**PMINJ Chapter**  
*International Project Management Day*  
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***The Secrets to  
Executive Engagement  
How to Gain and Sustain the Support  
You Need for Project Success***

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# Do You Want to Know a Secret (or two or three...)?

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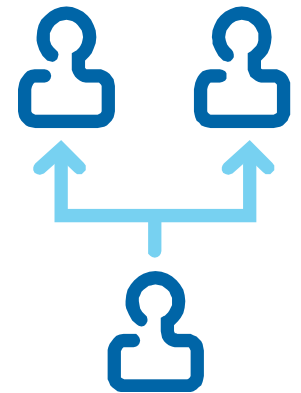
As a Project Manager, you are working in a 360° environment, getting projects done means managing people above, below and all around you

One of the biggest challenges is managing executive stakeholders:

- What if they ask questions I can't answer?
- I have a big issue to report – this is going to be awful!
- They never let me get through my presentation
- The project isn't getting support from their organizations
- I just want to get through this meeting!

Today we'll cover “**the secrets**”:

the tools and approaches to empower you  
to **manage up** and **leverage executive support**



## Executive Stakeholder Analysis – Who are They?

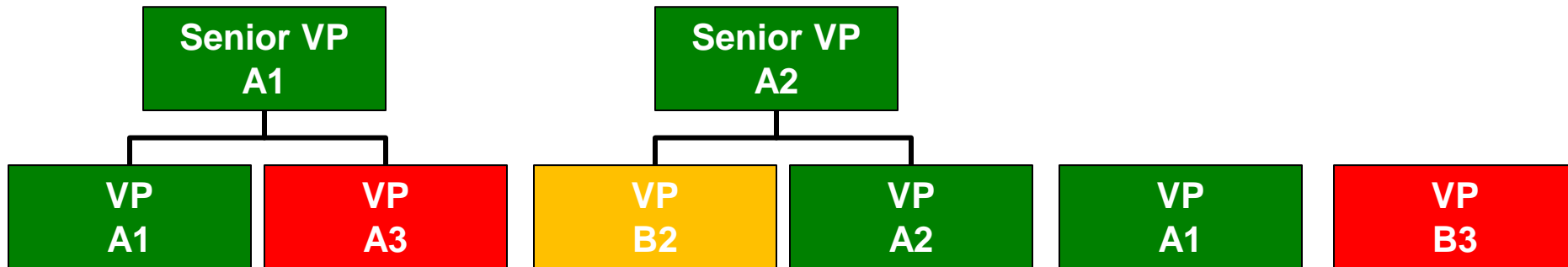
Stakeholder Analysis should happen at the beginning and throughout the project

- Have all the right executives been included?
- Be honest. Face the real issues so project can address them.
- Who are the Supporters? the Resisters?

Executive	What she needs from the project	What the project needs from her	Perceived attitudes and/or risks	Actions to Take
Exec Sponsor				
Process Owner VP				
CIO				
VP – Impacted Groups				
CFO				

# Stakeholder Assessment Diagram – Prosci Example

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A = Openly embrace the project and goals

B = Openly oppose the project or are neutral

Level 1 = experienced in project mgmt / steering

Level 2 = limited experience in project mgmt / steering

Level 3 = no experience in project mgmt / steering

A1 A2

B1 B2

A3 B3

# Stakeholder Analysis – Translate to the Project Plan



## Possible Actions:

- Get the right people around the table
- Figure out project governance (single sponsor, steering committee?)
- Define governance roles, meeting frequency
- Have one-on-ones
- Include Executives in Kick-off Session

## Big Meeting / Briefing Coming Up? Prepare!

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- Logistics can be deadly! Get these meetings on the calendar
- Work with **Executive Assistants** – stay in touch with them
- Push hard for a conference room of the right size
- Put an agenda or clear meeting purpose in the meeting invite
- Get in the room early to check on projector, layout, video / telecom
- Fit the culture – Handouts? Do presenters stand or sit?



# Preparing for the Big Meeting

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- Make sure there are **No Surprises**:
  - ✓ Have one-on-ones to socialize messaging, preview issues, recommendations and build support
  - ✓ Send out presentation in advance
  - ✓ Have “supporters” reach out to “resisters” in advance
  - ✓ It’s a Steering Committee – help them to steer



# Presentation Content – What You Want

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What is the purpose of a Steering Committee Meeting or an Executive Briefing for the **Project Manager**?

- ✓ Get funding and resources
- ✓ Show progress made versus planned
- ✓ Surface issues / risks and determine corrective action
- ✓ Get decisions made and set direction
- ✓ Break ties or resolve differences
- ✓ Set expectations for next milestones / deliverables



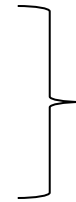


# Presentation Content – What the Execs Want

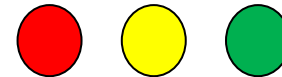
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What do **Executive Stakeholders** need from the meeting?

- Progress versus Plan
- Budget versus Actual
- Critical issues and risks
- Enough details to appreciate the level of complexity and effort
- Enough details to participate effectively in setting direction
- **To feel like their participation is necessary and valuable**



*Where do we stand?*



# Presentation Content – Format

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Establish a consistent framework that moves through these:

- Status Dashboard(s)
- Financial Dashboards
- Issues and Risks
- Action Items Status
- Next Steps

Avoid “Death by PowerPoint”!

10-15 slides max!

Details can go into an appendix

Distribute in advance of the meeting



## Presentation Content – the “Ask”

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There should always be an “**Ask**”:

- Ask for a decision on scope / requirements
- Ask for approval to move to next phase
- Ask for guidance on how to expand awareness
- Ask for funding / resources
- Ask for rewards and recognition

# Meeting Facilitation – Lead & Listen

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- ❑ Review the agenda at the start
- ❑ Stand for presentation / sit for discussion
- ❑ Keep your eye on the clock and stay on track
- ❑ Summarize any decision / actions / owners / deadlines made during meeting
- ❑ Ask questions:
  - Did we cover the topics you wanted to hear?
  - Are we on track with your expectations?
  - Is there anything we should change for the next meeting?  
*(Don't forget to smile and say thank you!)*
- ❑ Spend time listening



# Follow-up

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- ✓ Distribute Meeting Notes within 1-2 days:
  - Key Decisions
  - Action Items / Owner / Due Date
  - Topics for Next Meeting
- ✓ Don't be afraid to delegate "up"
- ✓ Use email and "drive by's" to get status on actions
- ✓ Different locations? Use the phone and make real contact.

Remember – as the Project Manager you are managing both the team AND the executives!

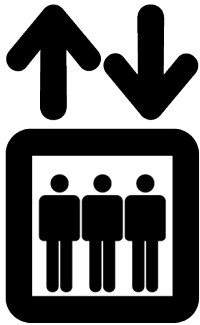


# Drive Ongoing Interaction

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**Schedule** one-on-one sessions throughout the project

- With both Supporters and Resisters
- Continue to socialize project goals & gains
- Follow-up on any past action items
- Bring up any issues
- Listen!



**Be ready** for the unexpected “elevator speech”

- Have talking points ready: successes & issues
- Compliment the exec’s staff when you can

**Create** opportunities to interact

- Use drive-by’s to share successes & issues
- Say thanks
- Invite to team meetings, celebrations, UAT, training
- Just make a connection

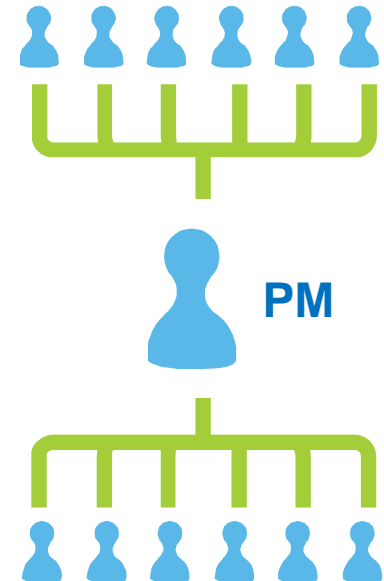
# What About Your Boss?

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The PM role is the ultimate in matrix management

So, how do you keep your boss in the loop (and happy)?

- Talk about it – early and often!
- Routinely copy the boss on communications to executives
- Never let the boss be blind-sided – notify about issues



# Summary – What will you take away?

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- The Secrets:
  - Analyze your Stakeholders & Develop a Plan
  - Prepare for the Big Meeting
  - Develop the Right Content
  - Facilitate the Meeting
  - Follow-up Actively
  - Drive Ongoing Interaction
  - Keep your Boss in the Loop
- Insights / Questions?

