



January 2015

The Manager's Overview vs. Point of View



We've reached the last week of January which means that most companies have completed their launch of the new year. In the last two months, we've worked on many of these "new year" keynotes as leaders set direction and position new priorities for the year ahead. Great leaders invest the time to get it right because they know that the impact of the message should set momentum for the months ahead.

Over the years, I've paid attention to what happens after the big launch. Most companies begin a cadence of monthly and quarterly meetings to find out how well those big initiatives are working their way through the company. The tables turn, and leaders are no longer talking to managers. Managers must now report out to leaders on how the initiatives are working. And in many cases, the smaller meetings that begin to take place drop off quickly in impact and value.

This communication has become known as the monthly update, the quarterly review and the dreaded overview. I'm sure there's a great use for the word, but in the world of communication it means, "I'm going to tell you a little about everything." And, that's just not productive.

Companies use the term to label the recurring monthly and quarterly meetings between managers and leaders. In preparation, managers work hard to represent everything they've done in a thirty to sixty minute time slot. In the meeting, executives work hard to draw conclusions and pull out useful takeaways.

If you ask both parties the real value of these meetings, you usually get a pause. Few managers can tell you what their audiences need; few audiences can tell you what they heard. All say they need routine communication to feel informed. But, informed is a low bar for what could be a clear takeaway or insight into what's really happening in a division. That's the value you want to get to.

In many companies, it is a repetitive communication, but it isn't a very effective one. It could be if managers learn to turn an overview into a point of view.

In our workshops, we say that every meeting or presentation should begin with the end in mind. And, managers can easily apply the concept to a meeting that has a clear ask and outcome: getting projects approved, allocating resources, changing a delivery day, etc.

But, they struggle with defining a clear takeaway from an overview or quarterly update. You have to draw conclusions from the details. Most groups look at the same data from month to month. So, rather than just showing what happened, use messaging to state a conclusion from the results.

There are only two conclusions you can draw: either you have momentum and are doing well or you have hit a challenge and need to adjust.

If it's a good month, we tell managers to state the reason for success. Own the impact and results with a message statement that tells the listener what worked and why it worked.

By adjusting our promotion calendar and aligning our ads with local events, we were able to increase sales of seasonal products by 15%.

This message suggests that sales are up and helps the manager own the reason for the success. So, chances are the meeting will focus more on key learnings from this and opportunities to leverage it elsewhere. That's what executives really want to talk about. That's a useful takeaway.

If it's a challenging month, messaging should be used to identify the challenge and state what you're doing about it.

By shifting our technology resources to our testing steps this month, we should be able to reduce our testing times and get our Spring rollout back on track.

This message suggests that a project has gotten off course and that by putting more people on the testing steps, the manager can make up time to get back on course. Chances are the meeting will focus more on how the executive can help with this and other implications of the shift. It will drive the conversation to the solution more than the problem. That's what executives need to talk about. That's a useful takeaway.

When these meetings discuss a little of everything, the executive begins to think like a manager and digs deep for indicators of what's happening in a region. By learning how to bring a point of view, managers steer the conversation, and the executive stays focused on thinking about how to leverage an opportunity or minimize the impact of a challenge. That's when the monthly and quarterly meetings become valuable. Executives get the clear takeaways and the meetings begin to drive great insights and early indicators for the business.

As we've taught our **Leading Executive Conversations** workshop, we're often asked to help restructure these quarterly meetings. And, we'd welcome the chance to work with your group to do the same. But, whether you call on us or adjust the format yourself, I hope you'll take our challenge and raise the bar. Let go of the overview and take your leaders a well-defined point of view. I feel confident that they'll notice the difference!

Call us when you need us!



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