

Presenting Upward in the Organization: Who's in Charge? **by Claudyne Wilder**

You have been asked to give a 15-minute update to the senior executives in your company about a major project you have worked on for one year. It is two weeks before the presentation date, and you really want to impress them. How do you go about it? Naturally, you want to show these executives how hard you have worked and all the processes you have gone through to arrive at your conclusions—right? Wrong!

Here is what some of my clients have wanted to do.

PRESENTER A: SOMEWHAT INSECURE, WITH A LOW LEVEL OF SELF-ESTEEM

He tells himself: “This is my opportunity to show these executives how hard I’ve been working. I’ll show them everything we’ve done with flow charts, tables and elaborate checklists. Then senior management will really understand the process and what it takes to do what they requested. They’ll fully appreciate all of our work and commitment to the project.”

Excited to prove himself to this group, Presenter A spends hours putting together 15 elaborate slides. Because he wants to communicate a lot of information, the slides are overwhelmingly detailed. Tables of multicolored numbers and multiple graphs on a single slide are packed with information, but impossible to read or even explain.

According to Michael Kernis of the University of Georgia, “People with fragile high self-esteem compensate for their self-doubts by engaging in exaggerated tendencies to defend, protect and enhance their feelings of self-worth” (<http://www.livescience.com/2495-fragility-esteem.html>). Sadly, Presenter A will confound, frustrate and confuse his audience, and leave the meeting wondering why the senior executives were unsatisfied with his prodigious efforts.

WHAT CAN PRESENTER A DO TO AVOID THIS RECIPE FOR DISASTER?

First of all, he needs to understand what the senior group is interested in hearing or knowing. He must learn to put the “perspective” part of himself in charge of organizing the content, not the more childlike “let me prove myself” part. When coaching such a client, I must first serve as his perspective part. A highly shortened form of our conversation would go something like this:

“Do those senior executives need to know all this? What do you want them to remember or take away from the presentation?” I ask.

Presenter A responds, “They need to see all that we’ve done to know we’ve been busy.”

“Are you still working? Did you get a raise?”

“Yes.”

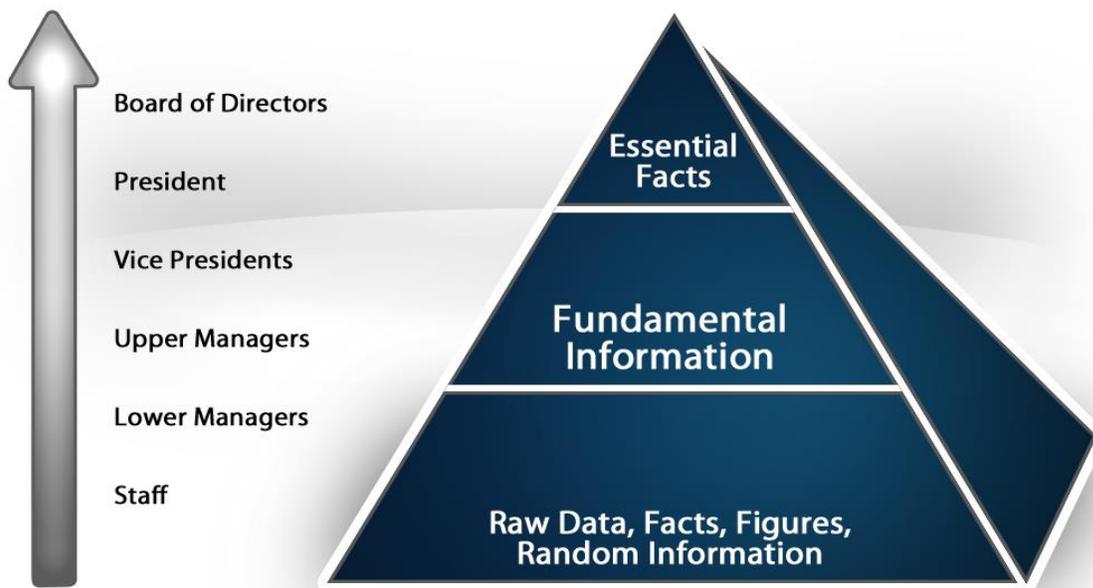
“Then they must believe you are working,” I say. “Wouldn’t it be better to show them how your work has benefited the company?”

DEVELOP AUDIENCE-INTEREST CONTENT

Presenter A's first reaction is to defend what he has done and justify all his charts, tables and information. Then, after some introspection, he usually admits, "Yes, I see I don't have to prove myself. Yes, they will be more interested in understanding how the whole company has benefited." But then he often has to add, "How can they possibly believe I am competent if I only show them three slides about a project that took me all year to complete?"

I call this the upside-down life experience. These senior executives want a presentation that explains the benefits of the project for the company. If appropriate, they also need certain information to help them make a decision about the project's next steps. That goal cannot be achieved by a presentation that is crammed with facts, charts, tables and other information that is not necessary to the executives' purpose. Indeed, what the executives want is the exact opposite of what Presenter A's "let me prove myself" part believes is necessary. Presenter A begins to realize that, paradoxically, he will be seen as more competent by saying less, focusing on the project's key benefits for the company and then leaving time for a dialogue with the executives. He learns to look at the presentation from the point of view of the executives rather than the perspective of his low self-esteem that pushes him to prove his worth.

To give Presenter A an even clearer perspective, I show this graph to illustrate how to plan the level of detail to share with executives.



As you present higher up the hierarchy, sift out, from your abundant raw information, only those facts essential for the decision to be made.

PRESENTER B: SECURE WITH HERSELF, WITH A HEALTHY LEVEL OF SELF-ESTEEM

She says to herself: "What will this senior group want to know? I'd love to show them all that we have done, but it's probably not necessary. I'll divide my presentation into the three benefits the company has received from this project in

DEVELOP AUDIENCE-INTEREST CONTENT

terms of cost savings, productivity increase and better customer satisfaction. Then I'll ask for more resources and show them what we could do in the future."

Presenter B spends about three hours preparing her presentation, mostly collecting key numbers and some customer testimonials. Plus, she figures out future projections showing how customers will benefit by the productivity expansion. She ends up with four slides and gives a very successful presentation. Presenter B has put her logical perspective part in charge of organizing the content. By exercising her ability to be in the audience's mindset, she is able to respond to what is important to them. She knows the level of detail needed when speaking higher up in the organization.

PRESENTER C: INFLATED SELF-ESTEEM—IT'S ALL ABOUT ME

I confess that I only hear about these people as they rarely cross my path in my coaching business. Presenter C puts together a presentation that is all about himself. He begins with a lot of detail about how he ran the project. If he is technically oriented, he overuses jargon that would generally not be familiar to many of the executives. He rarely includes his staff in the accomplishments, except perhaps to say that there were many people acting under his supervision. He has eight to ten slides just about how he ran the project.

While this type of person may initially instill some confidence in the executives, the actual presentation will likely leave them wondering what it was all about, and maybe even make them uncomfortable because of their unfamiliarity with the jargon. The net result: Presenter C will not achieve the objective of the presentation since the talk will have been about him and not the company's goals.

HOW CAN PRESENTER C DIAL BACK HIS OVERINFLATED SELF-ESTEEM?

Do you work with someone like this? Have him meet with one or two of the executives ahead of time to gather feedback on what type of content would be more useful at the meeting. Give him three preformatted slides to fill in—that will force him to focus on the correct content for the presentation. Here is a link which will provide you with some other suggestions: <http://blog.guykawasaki.com/2007/09/are-you-an-egom.html#axzz1bohI95VR>

WHAT DO EXECUTIVES WANT TO HEAR?

For any given presentation, you may use different aspects of your personality to drive the process. For a technical presentation to your colleagues, you may want the excited, passionate, more childlike "let me prove myself" part of you to run the show by putting together all you did in a creative, imaginative manner. For executives, you want the perspective part to take charge and help you understand what your audience wants to hear. A presentation to executives has less to do with you and more to do with sharing critical information and demonstrating how your project is helping the company grow. Executives do not need all the details—they want to know the overall status of your project and whether there are any issues to discuss before making key decisions. Be careful not to let the "let me prove myself" part organize your content. Always keep your perspective part in charge when presenting upward in the organization.