



2017
**UNION LEADERS
LEADING PARTNERSHIP**

**COALITION OF
KAISER PERMANENTE
UNIONS**

S-E-T ting up for Executives

How to not get derailed when asked a question and speaking from an Executive Summary

PRESENTED BY: Elaine Evans

Agenda for the day

A white rectangular card is tilted and placed over a dark teal background. On the card is a vertical list of five checkboxes. The first four checkboxes are marked with green checkmarks, and the fifth is empty. A green pencil is shown writing the checkmark in the fourth box.

Handling interruptions / distractions

Answering questions appropriately

Creating excellent Executive Summaries

Guiding principles for participation



- Be present and participate.
- Take charge of your own learning.
- Stay open – respect others' viewpoints.
- Preserve confidences – “Vegas Rules”
- Practice, practice, practice...
- Have fun!



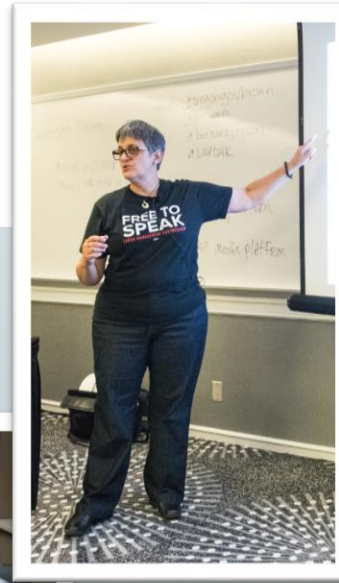
Interruptions and distractions



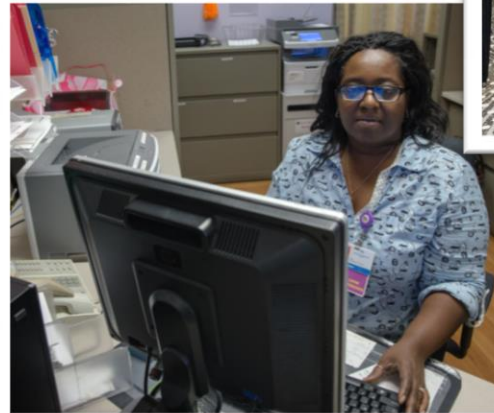
Turn interruptions into “intel”



Audience



Present



Preparation

Which would you prefer from audiences...



Finish, then find out it
didn't meet their
needs?

OR

Speak up to let you
know what they
want or need?

Can you prepare?

What is under your control?



In your control



Out of your control



ACTIVITY 1





Most common interruption?



What camp are you in?



Questions: Are they helpful?



- Find out your audience wants/needs
- Opportunity to shine
- Think on your feet
- Convince or persuade listeners
 - Done your research
 - Put a lot of thought into it
- Two-way conversation



Always allow time for questions

The Q&A danger zone



- Will I have the right answer?
- Will I be able to word the answer effectively?
- Will I lose control of the presentation?
- Will I be able to make them hold questions until I get all my information out?
- Can you prepare for all questions?



Imagine this



You ask a question:

- Speaker interrupts and starts answering before you're finished asking.
- Speaker answers, but doesn't address your actual question.



Frustrating?

Get into the rhythm



Listen



Confirm



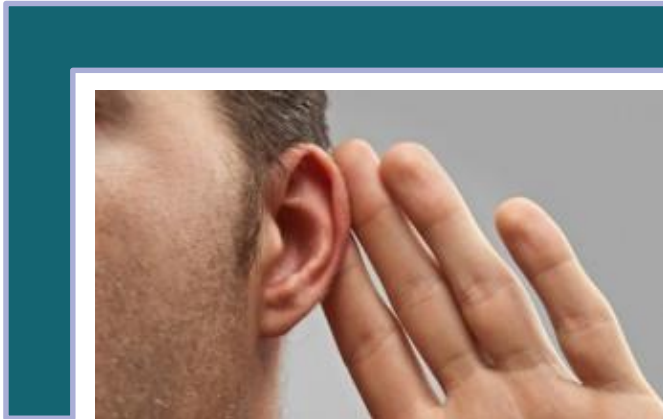
Respond



Always begin by listening



Listen

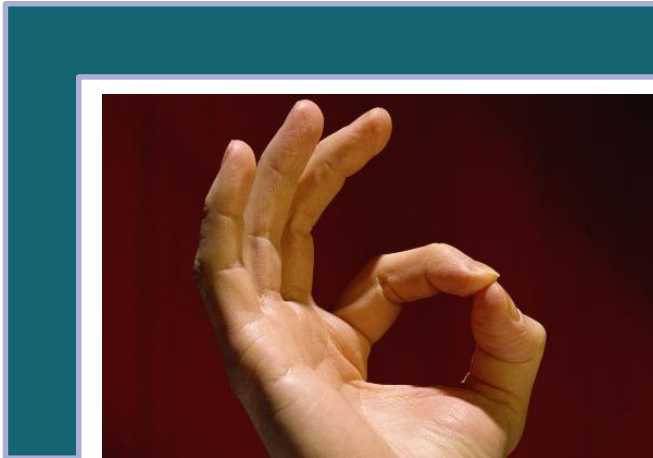


- Stop and pay attention.
- Listen with your eyes, ears and heart.
- Use body language to show you're listening.
- Hear the whole question.
- Don't start looking for the answer.

Always make sure you understand



Confirm

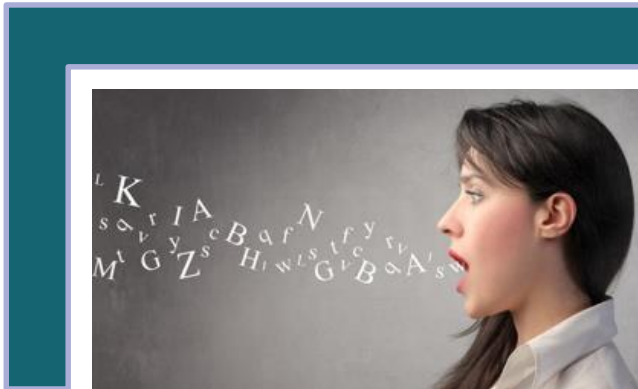


- If you didn't hear or understand it, ask to repeat.
- Paraphrase what you understood.
- Ask for confirmation/clarification.
- Repeat it to the audience.

Response concise and to the point

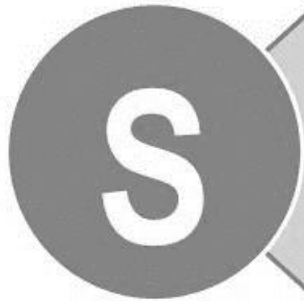


Respond



- If you know the answer, be concise and to the point.
- If you don't know the answer, say so and follow up later.
- Get other audience members involved.
- For tough questions, pause if needed to gather your thoughts.
- Say less, not more.

Use S.E.T. to structure your answers



Short answer to the question

- Yes or no
- Number or date
- Single point



Evidence

- Specific data point, fact, or other detail that supports the short answer



Test / Transition

- Confirm that you answered the question
- Move on

How is the Genesis project going?



S

Short answer to the question

It's right on schedule.

E

Evidence

We've completed Phases 1 & 2 and we start Phase 3 on Monday. We'll have a draft of the summary report by the end of the month.

T

Test / Transition

Will that work for you?



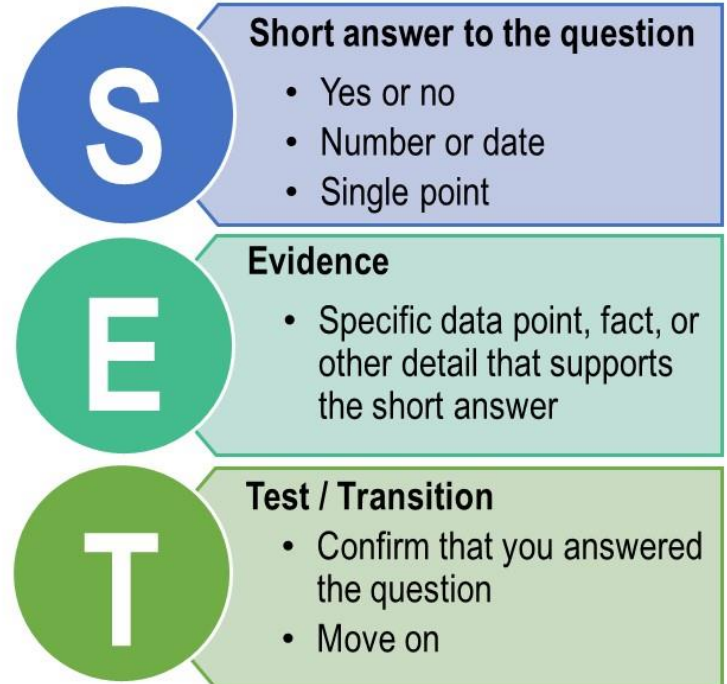
ACTIVITY

Develop SET responses to your questions



Based on your assigned scenario

1. Pull two index cards
2. Write **your name** and **one question** on each card
 - **One card:** Hope they ask question
 - **One card:** Hope they don't ask
3. Write your SET answer for each question in your handout
4. Work in pairs
 - Exchange cards
 - Practice answering using SET



Words of wisdom



Perhaps the best advice in the face of ringing phones, pesky questions, power outages, and whatever else may happen...





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Executive Summary

Why bother with an executive summary?



Benefits of executive summary



- Same flow as presentation
- Easier for audience to follow
- Help uncover improvements/streamline

Executive Summary Funding the Employee Development Project

Jordan Shepard

Recommendation: Provide the \$1.5m needed to fund the Employee Development Project using the surplus from the relocation project

Goal for today: Obtain the final approval from the committee needed for me to proceed with the project.

Current situation: Stakeholders agree that employee development is a very high priority for funding. Funds needed to implement the Employee Development Project are \$1.5m. I propose using the surplus from relocation project, which was completed in March, and have obtained approvals from IT, Finance, HR, and Quality.

Background and Analysis: The original estimate for implementing the relocation strategy was \$4.2m however, the actual cost to complete the relocation was just \$2.4m. This leaves a \$1.8m surplus.

Since employee development and relocation are both part of the Team Efficiency Initiative, it is reasonable to apply the surplus to the Employee Development Project if key stakeholders approve.

Estimate to implement relocation strategy

\$4.2 million

Actual cost to complete relocation

\$2.4 million

Surplus

\$1.8 million

Employee Development Project

Reallocate to my project →

\$1.5 million

Structuring an executive summary



Traditional flow

Intro

Background

Supporting points

Bottom line + ask

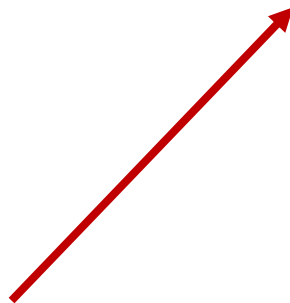
“Answer first” flow

Bottom line + ask

Background

Supporting points

Review bottom line + ask



Executive summary guidelines



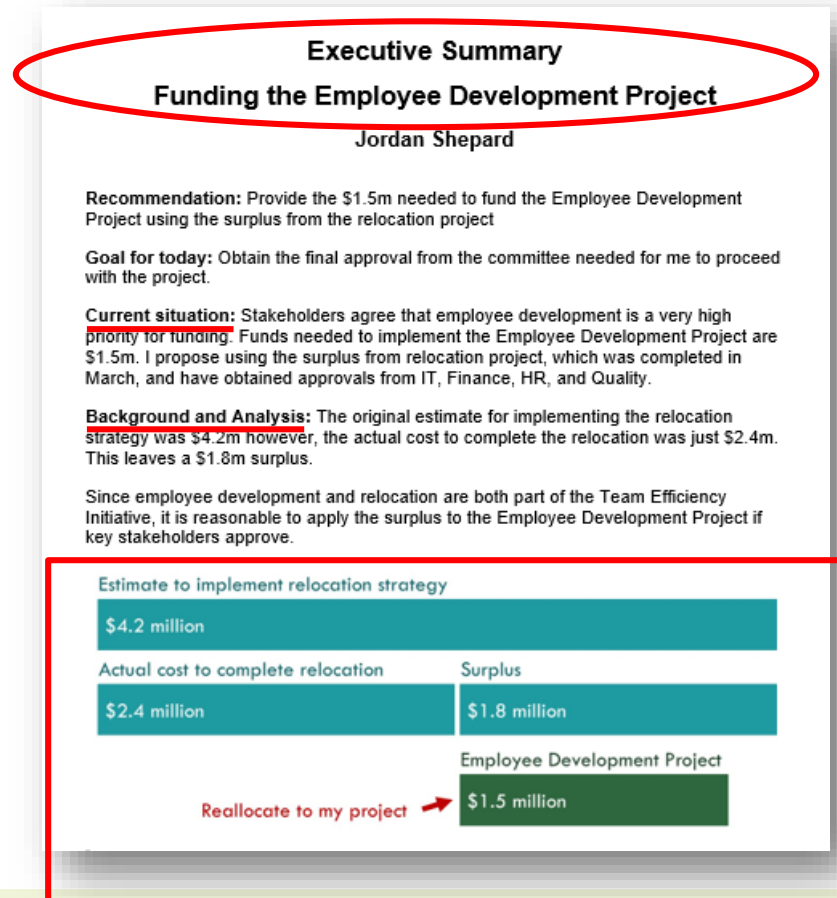
Content

- Start with your “answer first”
 - Call to action or “ask”, recommendation or bottom line
- Consider including data graphic
- Aim for one page
 - If two pages, print two-sided
- Ask yourself
 - Does my Executive Summary answer the 2-3 most likely questions?

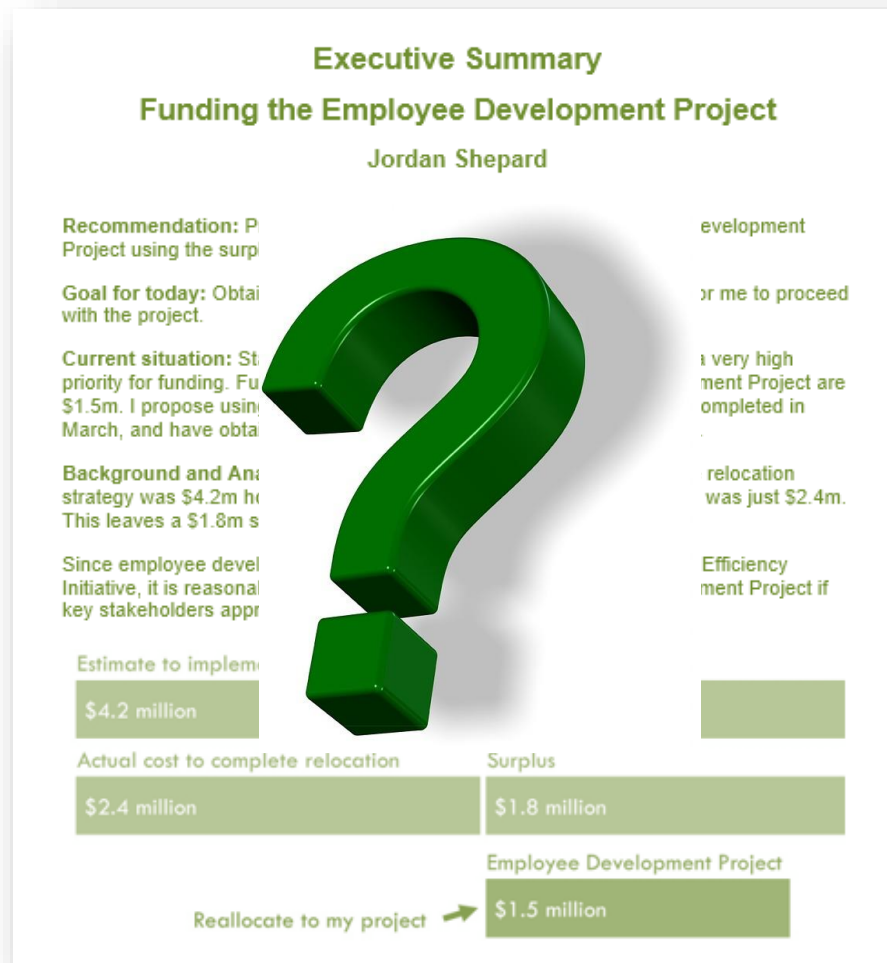
Example 1



- Clear title
- Starts with “answer first”
- Bold headings
- Follows R-SBAR flow
- Data is simple, clear and easy on the eye



Could you present only an executive summary?



ACTIVITY

Draft your executive summary



- Create a first draft of an executive summary based on your scenario.
- Use the executive summary template in your guide.
- Get feedback from your partner.

Executive Summary	
Header	Descriptive header at top of executive summary
Answer first	Recommendation, ask, or call to action
Current situation	Point 1 and key supporting details
Background	Point 2 and key supporting details
Background	Point 3 and key supporting details
Answer first	Summary or restatement
Data point or graphic	Sketch on separate page

Make up missing details if needed

**What was the
most
challenging?**



Where to learn more



Books

- HBR Guide to Persuasive Presentations, by Nancy Duarte
- Resonate – Present visual stories that transform audiences – Nancy Duarte
- Presentation Skills 201: How to Take It to the Next Level as a Confident, Engaging Presenter – William R. Steele

Websites

- <http://www.genardmethod.com/>
- <http://www.duarte.com/blog/free-multimedia-version-of-resonate/>

Enjoy the journey

