

- :00 Well hi. It's Margaret Maloney. I thought today, we would spend some time on reporting status to executives.
- 0:08 Gosh, this seem easy. But so many people get it wrong. Not you though, okay? Not you. So with the first thing we want to talk about is be prepared.
- 0:18 It seems obvious. But look around next time you're in a meeting, where presentations are being made, and you'll notice that some people really do not come across as if they were ready for this meeting, or for the presentation. You are gonna be prepared.
- 0:34 Being prepared means a few different things. For example, if you're supposed to use a specific template or format, and you're supposed to provide your completed status, if it's a status presentation, which we're talking about status to executives. So let's assume yes, it is. If you are supposed to have it in by a certain day and time, that you do, so you're going to make that happen. If there's a deadline to turn in your information, you're gonna meet that deadline.
- 1:02 You're gonna use this time the right way.
- 1:06 You're not gonna have typos or mistakes. Now don't beat yourself up. Every once and awhile, a typo slips by us.
- 1:14 But there's a difference between the occasional oops, and the person whose work and report is riddled with errors most of the time. So you're not gonna have errors most of the time. So proofread and edit, walk away if you have to take a break. If you can't look at something any more, walk away and come back and look at it a little bit later.
- 1:34 Because you're gonna have a professional-looking status template or presentation. And you're gonna know what you are going to say. This is another important part of preparation. I have seen very good project managers fall down when it comes to reporting status and giving project presentations. And I don't mean like physically falling down, like tripping themselves or something, but I mean losing credibility in the eyes of the executive team. Remember, this is an opportunity to showcase just how good you are. I do not mean show off and be obnoxious. But show the executive team how professional and pulled together you are. Make a good impression.
- 2:15 You do not make a good impression by being unprepared or uncertain about what to say.
- 2:22 An example, there we're a group of us, we met twice a month with our vice president. And the way it worked is we did have something we were supposed to fill out, we all filled out a slide. The slides all looked the same, the difference would have been the project and the data, but we all follow the same format. So of course we had a time line as when to get those in. And so there were some people our manager was always after, get me your slide, get me your slide, get me your slide. So right away, the manager would be annoyed with the people who were late. Then the manager would take all of our slides and compile them into one presentation. And then the way it would work is during the presentation, during the meeting, our manager would drive, by clicking through from slide to slide, and when your slide came up, it was your turn to speak.
- 3:12 Pretty easy, right?
- 3:14 Should've been.
- 3:17 So mistake number one. Some project managers were not paying attention, and when their slide came up, we would all wait for them to speak.
- 3:24 And if they were in the room, we would all turn and stare at them. If it was a virtual meeting, we would wait and then we'd call out their names.
- 3:33 So, imagine how embarrassing, to be caught not paying attention. That's not a great way to start, that's not a great way to start. Now a second issue. Maybe somebody, this person, they would talk, but they hadn't

thought about what they wanted to say. So it was disorganized and disjointed. They spent so much time running around and then creating their slide, and filling it out, that when they got in the room, they hadn't thought about what they wanted to say.

- 3:59 Think about this status presentation as a strategic communication. It's not just an administrative thing. I have to do my status report. I have to fill out this slide. It's a strategic communication opportunity. What do you want people to know about your project? All eyes are on you.
- 4:19 This is the perfect opportunity to make sure you share accomplishments. You can give credit to team members who are doing outstanding work. You can make sure pending risks are understood, and you can ask for support where it is needed. This is the time when you have everyone together. And of course, you want to be able to answer questions and concerns, too. But again, this is a strategic session.
- 4:42 You're gonna be judged based on your ability to communicate with your executive team. Whether it's fair or not, this is how it works.
- 4:50 Those who are not prepared were picked on, and by picked on, I don't mean made fun of, or bullied. But what I noticed was that those who didn't present well, received more in-depth questioning from our executives.
- 5:04 And of course, our executives have the right to ask as much or as little as they wish. They're the ones that are responsible for the overall strategy and how we spent our time and money as a company. But those who did not prepare came across as not very confident. And so the types of questions and in depth analysis that was conducted, I'll say on them, in front of everyone, came across more like, is this person really okay to do the job, as opposed to interested questions? Now those who prepared and came across as confident and knowledgeable, they did well. They got positive attention, while those who were unprepared got negative attention.
- 5:50 I don't know about you, but I would like to be asked detailed questions because someone is interested in the project and in the team, and in my top performers, and not because they're not sure if they can trust me. Be prepared. Again, I know it sounds obvious, but some people they just don't get it. They just don't get it. Think about what you want to say. Remember to address items that require your follow-up from your last presentations.
- 6:15 Guide the presentation.
- 6:18 Be on time. Obvious, yes again, but don't run in late and if you're going to be late, have a really, really good reason, and provide a heads up so nobody's wondering where you are or what's happening.
- 6:31 Another thought, be differential, no matter what your organizational culture is like. Remember, you're reporting to a person or persons who outrank you, and it doesn't mean that you have to bow, you know, kiss their feet, kiss their ring. Any of those things. But respect their position and their authority.
- 6:52 Understand when to push an issue and have a healthy debate, and when to back off.
- 6:57 Be aware of their areas of sensitivity. This does not mean that you lie, or withhold information. But it does mean that you carefully consider how to approach difficult topics.
- 7:08 If you need to discuss something difficult, and eventually you're going to, you might even let them know in advance so they don't feel blindsided. Do not speak over them.
- 7:18 If one of the executives decides to step in and take over, allow it. This is not the time to be in a competition with one of your executives.
- 7:27 There is an example that fits in here, that I really want to share with you. There's somebody that a group of us used to give status to. And I have to tell you something, we all dreaded it. And the line up was so important, nobody wanted to be the first person, or even maybe in the first three to five people. And this is why this executive from this place, from long ago,
- 7:51 if you were the first person, he spent a lot of time on you, on your project, and asked you many, many

questions. And so sometimes, we never even finished the project presentations. So if you were in the last group to present, you maybe didn't present. And so sometimes with this one individual, this was kind of a good thing because what we learned is that

- 8:17 he liked to ask you questions until you couldn't answer him any more. So what we learned was, you needed to be able to answer enough questions so that he didn't think you were unqualified, but you also needed at some point to say, I don't know, because he needed to prove that he was smarter than you. And I know this sounds very odd, but so if you answered every one of his questions, you were gonna suffer. It was a game.
- 8:47 Games get played on the job all the time. It's part of politics. This is not the best use of our time, this particular game, but this was how it was. And so we each had to make a judgement call as to where we would say I don't know.
- 8:59 I'll tell you an example of a game he played with me.
- 9:03 I was leading a project where we were updating some software on laptops, and we had reached project completion. And he looked at me and he said, so you're telling me that you have updated 100% of the laptops? I was used to him, so I sensed a trick. And I replied, I'm telling you that we have updated all of the laptops we are aware of.
- 9:24 He came back with, well, that's good, because there's a laptop in the trunk of my car, and I know you have not updated it. Now, I hope you don't have to work with someone like that, and I don't know why he was driving around with a laptop in his trunk. I don't know if it was a plan to mess with me and others, or if it just happened to be that way.
- 9:43 But, these are some of the things we have to be prepared for, that's how it is. Be honest, don't report how you want things to be, don't report how things should be, report things as they truly are.
- 9:57 If it's Friday morning and you're behind schedule, and a team's going to work the weekend to get back on schedule, call it like it is. Say it's Friday, we're behind schedule. Here's what we're doing. The plan is to work this weekend and get back on schedule. Now because what if something happens and you don't? If you do not know the answer to a question, then guess what? You don't know the answer to the question. This is another area where I've seen some of my peers struggle. I think sometimes, we just want to know everything. We feel like we should be able to tell an executive everything. They should think that we know everything. We don't want them to think that we're inept.
- 10:33 But if you lie, you make up an answer, you're gonna have to remember what you said, whether or not if it was correct.
- 10:40 If you do not know, you might say something along the lines of, I don't have that information right now, can I get back to you? And then of course, get back to them with the appropriate information.
- 10:52 If too often, you don't know, that's a different situation. There are some basics you should always be able to address, the schedule, the budget, top issues you're facing, risks that are coming up. There some things you should always be able to talk about. But once in a while, someone's gonna throw you a question and you don't know. Be concise.
- 11:11 It's called an executive briefing. That means short.
- 11:16 Answer the question. Inject a little story or something to personalize the information. Don't go off on a big long story or you're gonna be cut off. Or your boss will be told not to bring you back again cuz you take too much time.
- 11:30 Follow up. When you're asked for more information or you're given an action item, be sure to follow up in a timely manner. Even if the person you asked doesn't remember that they asked you, it's okay. It's okay. Other people in the room probably will. Remember, be prepared. Think of your status as strategic communications. Be on time. Be deferential. Be honest. Be concise. And follow up. And when you use these tips, you're gonna feel more confident, and you're going to be trusted and viewed as a skilled professional. Right on. All right, bye for now.

