

Why Should
the Boss
Listen to
You?



The
Seven Disciplines
of the Trusted Strategic Advisor

James E. Lukaszewski

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The Seven Disciplines of the Trusted Strategic Advisor

James E. Lukaszewski
Jossey-Bass, 2008

Recommendation

Crisis management and PR consultant James E. Lukaszewski offers some guidance to people who want to make a career out of advising CEOs and other key executive managers. The author practices what he preaches by keeping the book focused, positive and concise. In the first part, he teaches you what matters to CEOs, why and how they think, and how to become an asset to their work. In the second part of the book, Lukaszewski devotes a chapter to each of the seven traits a successful CEO adviser needs. The list covers a combination of personal traits, patterns of thought, and skill at communicating with executives. This book will be most useful in helping you break away from a staff view of your company, so you can learn to evaluate situations from a CEO's perspective. *BooksInShort* thinks this outlook will be useful to anyone who wants to be an effective adviser.

Take-Aways

- CEOs are under great pressure and need help to achieve their goals.
- To establish rapport with your CEO, prove yourself reliable and trustworthy.
- Provide solid information in real time to the executives you counsel.
- Avoid the “face time fantasy,” which may lead you to believe that you are important to the CEO because you spend time with him or her.
- Become a “verbal visionary” and develop the ability to inspire with words.
- Perceive the world through the eyes of a strategist – someone who is intentionally inconsistent and views everything from unusual perspectives.
- Rise above a staff viewpoint and see issues from a whole-company perspective.
- Yesterday only matters if it can help you solve problems and make tomorrow better.
- Use the “Three-Minute Drill” to give advice powerfully and concisely.
- Use your actions, words and ideas to demonstrate the traits you hope the CEO will embody.

Summary

How CEOs Succeed or Fail

If you want CEOs and other top executives to listen to your advice, start by understanding their needs. They don't require advice from a staff perspective. You must develop expertise far beyond that and come to understand the issues the entire company faces. CEOs need advisers to help with the dynamics of dealing with a board of directors. And CEOs have to be comfortable with ambiguity. Chief executives can change the direction of their companies only incrementally. Most CEOs have to deal with corporate inertia and must settle for changing things an inch at a time.

“There are tasks CEOs face every day that only they can handle, tasks that intrude on their day.”

CEOs focus on tomorrow and the day after rather than on yesterday or what might happen in the distant future. They state the corporate vision, and then encourage, cheerlead, direct and organize the company to work toward it. If they do not deliver, overstate their accomplishments, don't get people behind them, get caught up in minutiae or mired down in one issue, they fail. To succeed, CEOs must focus their people on fulfilling a clear vision laid out as a limited number of significant but achievable objectives. CEOs must accomplish immediate goals before they can move on to longer-range objectives. Too many changes of direction undermine the

support they get from the board, employees and customers.

What Executives Want From You

CEOs need clear, constructive and accurate information. They usually want to get any bad news as soon as possible so they can act immediately to avoid unaddressed and worsening problems. Advisers should always see things from the CEO's point of view. Advice or analysis is only useful to executives if it helps them run their companies better, so your recommendations should always be "practical, pragmatic, purposeful, focused and fair." Advisers should provide CEOs with open, honest advice in real time. Rather than criticize CEOs, be constructive, provide valuable insights and knowledge, and warn of worsening situations. Counselors help CEOs by developing their vision, and by providing emotional support and genuine insights into the company's operations and direction. Demonstrate your loyalty. Help your chief executive lead better by understanding what leadership is and how leaders work.

"What matters to leaders is success. They will pay attention to you if they think you have a good sense of what they need to achieve that success."

Avoid the "face time fantasy," which may lead you to believe that you are important to the CEO because you spend time with him or her. You matter only to the extent that you provide valuable information and actionable advice. When you achieve this, your reputation and influence will grow. But that reputation can evaporate very quickly if you are careless or provide bad counsel. Learn to use the language of upper management knowledgeably. Provide solid, useful data that helps the CEO make decisions or evaluate a project's progress. Give insightful, perceptive analysis. Stating the obvious is one of the trusted advisor's most crucial responsibilities, the goal is to help keep the executives firmly grounded.

"Your perspective does matter, provided that, first, it reflects the attitudes and needs of the managers you are advising."

CEOs must place the right talent in the right jobs, and build a corps of real-time achievers and leaders for the future. Secure the loyalty of rising stars by helping them develop. Provide your CEO with employee assessments that identify these up-and-comers' current and future roles and responsibilities.

"Learn something that matters about the business, and you will go a very long way toward gaining the respect and connection you will need to become a trusted strategic adviser."

To succeed as an advisor to senior executives, get involved in projects that appeal to the CEOs. Provide solid ideas rather than making many little suggestions. Never be selfish. Be curious, identify, investigate and master new and less understood information. Keep your ego in check and learn to adapt. To walk into the executive suite as a valued adviser, follow these seven steps:

1. "Be Trustworthy"

Executives must trust you before they'll take your advice. Unless they know you are on their side, can keep secrets and have sound judgment, they are unlikely to turn to you for help. When people who are passed over for promotion complain that the person who beat them for the job isn't as competent as they are, they often overlook the winner's trustworthiness. Ability and brilliance are not worth much if the person with these qualities also breaks promises or indulges in careless talk and self-aggrandizement. CEOs depend on people who strive to fulfill their visions, not those who have independent agendas.

"As you move up in authority, responsibility and power, trust becomes increasingly crucial."

Misplaced loyalty also can get you into trouble – not all CEOs deserve your dedication and trust. If a boss asks you to participate in activities of questionable ethical merit, break off the relationship. Walking away from a promotion, contract or even a job will cost you less than losing your integrity, damaging your reputation or facing criminal prosecution. Consider the limits of your loyalty and define your personal boundaries in advance. That way, if a difficult situation arises, you will have already decided what to do, rather than having to improvise under terrible pressure. Trust is a precious commodity that you can lose in one careless moment.

2. "Become a Verbal Visionary"

CEOs drive and lead organizations by what they say. Words are a CEO's stock in trade. As a CEO adviser, supply language that creates visions and inspires people to greater achievements. Study words and rhetoric; develop the ability to tell stories that stay in the heart as well as the mind. Master these six tools:

1. **"Facts"** – Your visions have to be grounded in reality.
2. **"Stories"** – The right story gives shape and power to your ideas.
3. **"Questions"** – The right question opens minds to help people remember ideas.
4. **"Comparisons"** – Contrasts can help people see the right and the wrong way.
5. **"Recommendations and options"** – Practice being concise and vivid.
6. **"Constructive confrontation"** – Put ideas together in a way that points to a better alternative, rather than pulling the argument apart.

"Management strategy, management leadership, management problem solving are always about tomorrow, even if the topic is yesterday's mistakes."

Try to become a verbal visionary, that is, a "coach and mentor" and a "storyteller" who is "memorable, inspirational, thoughtful, ethical [and] virtuous." Use your convictions and strong sense of identity as a foundation for sharing your aspirations, goals and sense of destiny.

3. "Develop a Management Perspective"

Most problems seem much simpler when you see only some of the issues involved. Think back to when, as a fiery young staffer, you were highly frustrated that executives did not share your understanding and insight. When you matured and saw the situation from a management perspective, you changed your attitude and were heard more often. Strategic advisers learn to see from the highest level. Showing this degree of understanding and support for top executives gives you the standing to help them. Once you have proven yourself valuable, you might be included in the CEO's inner circle of advisers. However, don't assume that when the CEO asks you

for advice you have been admitted. Remember, you are a staff person advising those in operations. Until you are in operations you will always be a staff person.

“Using criticism as a teaching and change technique leads to very bad results...Negative advice often leads to even more negative behavior.”

Rather than asking questions that challenge or demean the executives you are advising, make your questions productive instead. Ask about strategy, resources, finances, regulatory issues and timing. Anticipate topics and issues that might arise in meetings you attend. Prepare answers in case you are called upon for advice. As the CEO makes decisions, adjust your perspective as a part of the team, rather than making yourself a barrier that stands in the way and must be bypassed. Be sure your work is complete and of the highest quality. Focus on finding solutions rather than on finding problems. Always arrive at meetings early and stay “one step ahead.”

4. “Think Strategically”

“Strategic” is not a synonym for “important” or “fundamental.” Strategy has to do with primary goals and positive accomplishments. Companies try to use all of their resources to work tactically toward achieving their strategies. The most fundamental task for a CEO and a board of directors is to set the right strategic objectives and lead the organization to fulfill them.

“It’s better to have several smaller meetings that all end on time rather than one or two large meetings that put everyone behind schedule and accomplish less.”

Avoid using negative words when advising top executives, and don’t focus on the past or dwell on their mistakes. As they think through their strategic options, help them consider their conflicting choices, question assumptions and think about all the possible approaches to reaching their strategic goals. Zero in on key aspects of the issues you are analyzing. Act incrementally. Constantly test your strategic assumptions against the reality of your situation. Watch and learn how other trusted advisors develop successful, pragmatic approaches, teach yourself how to give better advice, and take more effective action.

5. “Be a Window to Tomorrow: Understand the Power of Patterns”

The past is a useful repository of case studies from which you can analyze and learn, but focus on what you can do today to build tomorrow. Rehashing, rehearsing and redigesting yesterday’s problems are a complete waste of time. Make it your goal to see patterns in actions and behaviors, and use that insight to help you better understand the situations your boss confronts. You may be right only half the time, but you will be right more often than those who simply guess because they can’t perceive patterns. Study corporate succession, organizational restructuring, mergers, buyouts, finances and marketing to improve your ability to see what is coming next. Remember that CEOs need help getting tomorrow right, so focus your advice there. Studying with a future focus will help you build five strengths:

1. An understanding of strategic patterns so you can be an “intelligent forecaster.”
2. A repertoire of compelling war stories you can use to illustrate points.
3. A knowledge of patterns that tells you which strategic tools to use to avoid problems.
4. Background information that can make you more efficient in solving everyday problems so you can focus on managing and preventing any future potential threats
5. An ability to use the right patterns to make comments and writing more memorable.

6. “Advise Constructively”

The commonly used term “constructive criticism” is an oxymoron. Negative comments – even well intentioned – may make the person you are criticizing stop listening to you. Worse still, the CEO may completely reject you as an adviser or teacher, and you will be unable to contribute further. Instead, recast your criticism in positive, helpful terms so that you are heard and put your energy toward improving the situation. Put such tools as timelines, priority lists and flowcharts to work to convey your ideas clearly and memorably. Use the “Three-Minute Drill” to deliver concise proposals in six steps and three minutes:

1. Describe the situation or scenario in 60 words or less.
2. State the implications of the situation and why it matters in 60 words or less.
3. Provide an achievable task to be performed in 60 words or less.
4. Provide three to five options for accomplishing the task in 150 words or less.
5. State your recommendation for the choice you believe to be best in 60 words or less.
6. Justify your decision and why it is worth the risks in 60 words or less.

“A single flowchart, generally on one side of one sheet of paper, is worth at least a notebook full of words and tabs.”

Withstand the urge to act rashly when difficulties arise. Panicking when things go wrong often leads people to make their situations worse. Instead of asking endless questions, act with deliberate speed, assess the crisis and find a viable course of action with real potential for a positive result. As Stephen Covey says, “Plan with the end in mind.” Make better decisions by slowing down, working in real time and focusing on the facts.

7. “Show the Boss How to Use Your Advice”

The best way to get a CEO to understand your ideas is to manifest his or her positive qualities in the way you advise and coach. Your advice should be simple, sensible, constructive and positive. Help leaders assess their own performance every day. What were the surprises, questions and most important learnings? Work to make the advisory relationship effective. However, if you get trapped in endless analysis, you may fail to act and will miss key opportunities. Use your drive, talents and the right tools to become an important resource to your CEO (which is what you wanted all along).

About the Author

James E. Lukaszewski is a strategic adviser and head of The Lukaszewski Group. He consults with companies on crisis management and PR issues.

