An Introduction to Communicating with Administrators

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Why this session?

• iDigBio Community Surveys
  – We've had requests over the years for tools to help people communicate the value of collections and digitization to administrators
  – Many in our community feel administrators do not value collections nor digitization and so do not provide adequate funding

• Leadership Development
  – Communication is fundamental
Foundations

• Strategic Planning for Herbaria
  – 7-week Short Course taught in 2017 and 2018 by Austin Mast and David Jennings with guest lecturer Shari Ellis
  – Addressed vision, mission, stakeholders, strategies, goals, objectives, evaluation, sustainability, among other topics
  – Goal was a basic strategic plan by course end
  – *Process is more important than product*
What defines success? How will you measure progress/impact?

Who are you? What do you value? What are you going to do?

How will you reach your vision? How will you realize your mission? How will you achieve your objectives?

How will you measure your progress? How will you know when you’ve succeeded?

For whom do you do it? Who is invested in you?

What is your dream? What do you aspire to become?
## Know your Stakeholders

- Stakeholders = *positive* or *negative* impact on or by your actions
- Administrators have high power, but may have low interest
  - Ideally, you want to convert them into *key players*

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<th>Power</th>
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<tr>
<td>low</td>
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- **Keep satisfied**
- **Key players – manage closely**
- **Monitor – minimal effort**
- **Keep informed**
The Elevator Pitch

• Short speech you can launch whenever you need to make a quick summary of your project, idea, etc.
  – Quickly define your product/service and its value proposition
  – 30-seconds to 2-minutes

• However:
  – Think *conversation* instead of information transmission
  – Invite the listener to *discuss* how to *solve their problem* or *get a job done for them*

• Tell a compelling *story* that includes an *offer*
  – Invite the listener to help make the vision happen
  – Seek commitment to participate in an offer conversation

• Practice, but don’t sound rehearsed
The Basics – Part 1

• Summarize first
  – Pretend like you only have 5 minutes
    • *High-level* findings, conclusions, recommendations
    • Focus on *impact*, not process
    • Look to the *future*; don’t rationalize the past
    • What is your “*ask*”

• Conversation rather than Presentation
  – Present your 5-minute summary
  – Invite dialog as you move through supporting data and information
The Basics – Part 2

• Be Specific, Clear, and Concise
  – Give them what they asked for – no more, no less
  – Don’t think out loud

• Be Passionate
  – Believe in what you are saying
  – But, executives can smell BS a mile away

• Know your Numbers, Logic, etc.
  – If there is a flaw, they will find it
  – Don’t guess; know where you stand
Some Terminology

• **Data**
  – Information you collect

• **Metrics**
  – Measurements using data that matter to a specific target, goal, objective, outcome, impact, etc.

• **Benchmarks**
  – Points of reference against which you can compare or assess your metrics, progress, outcomes, etc.

• **Milestones**
  – Actions or events that denote a significant change in progress or development
Putting things together

Regularly collect **data** that allow you to track progress against your target/goal/objective/etc. using your **metrics**. Compare your metrics against **benchmarks**. Use **milestones** to celebrate your progress.
Metrics vs. Data

- Data is the information you collect
- Metrics are what you measure and contain a single type of data
  - Consistent, inexpensive, and easy to collect
  - You need to be able to manage to your metrics
- You can control your metrics, but you can’t control your data
  - You become your metrics
  - Collect data on metrics that matter
Benchmarks

• Compare yourself to your competitors, peers, or even yourself
  – Sometimes it is not wise to “copy” your competition
  – Common practice in one industry/area can be revolutionary in others

• Beware of selection bias:
  – Compare with successful organizations as well as floundering ones
  – Ensure population is represented

• Beware of confirmation bias
  – Particularly when comparing against yourself
  – Confidence in judgment is often at odds with reality
Some Benefits of Knowing

- Document progress against goals, objectives, milestones, etc.
- Continually assess stakeholder needs
- Measure the impact of your activities
- Assess your leadership, management, and communication
- Unify and align your organization
- Determine your strengths and weaknesses
- Measure your efficiency
- Cost-benefit analysis
- Plan for the future
In summary…

• Tell a story that summarizes your vision and offer
• Invite conversation
• Specific, clear, and concise message
• Make them believe that you believe
• Know where you stand
• Don’t expect a “group hug” at the end
References & Additional Reading

- “How to Present to Senior Executives”
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Thank you!

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