



An Introduction to Communicating with Administrators

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Why this session?

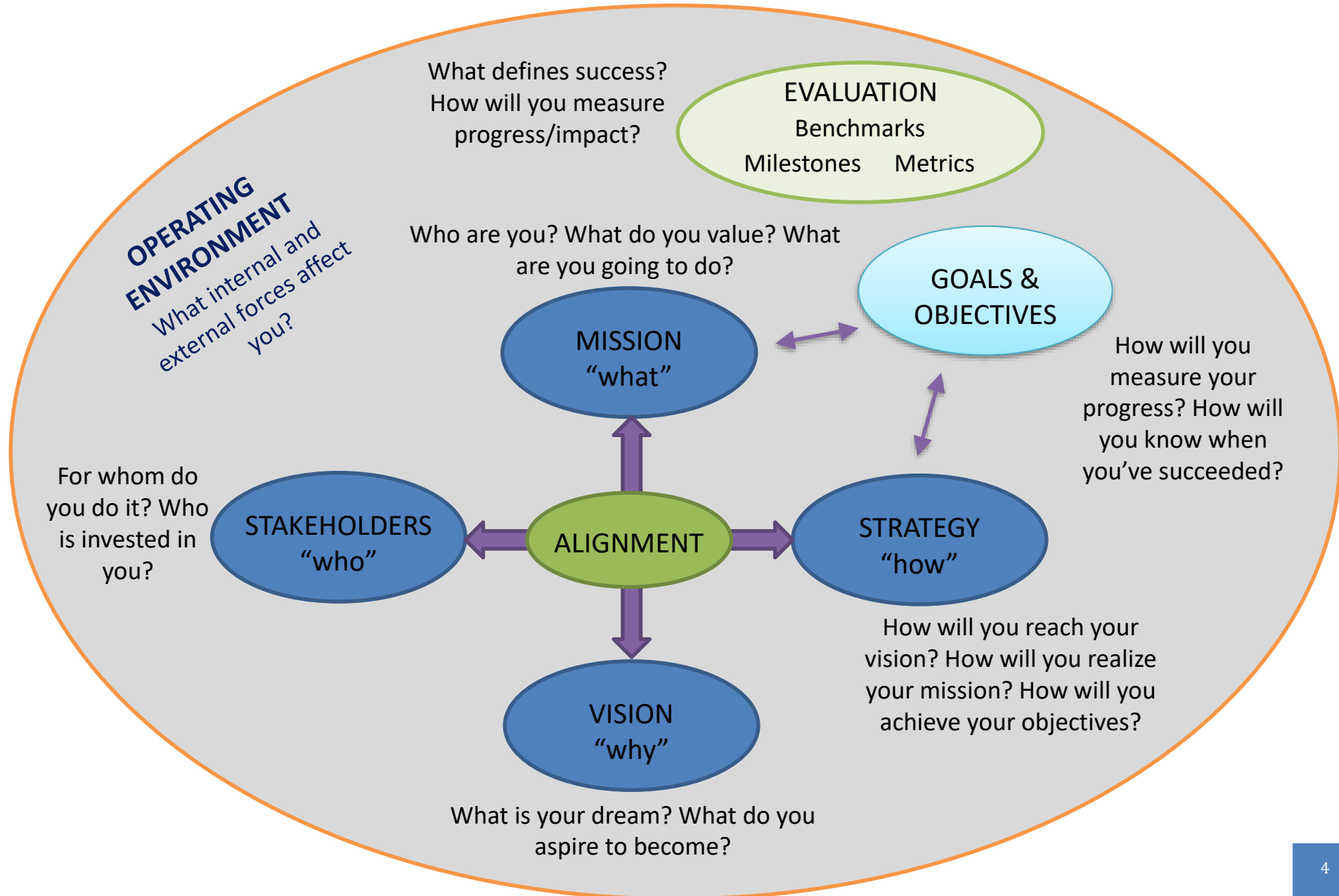
- iDigBio Community Surveys
 - We've had requests over the years for tools to help people communicate the value of collections and digitization to administrators
 - Many in our community feel administrators do not value collections nor digitization and so do not provide adequate funding
- Leadership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





Foundations

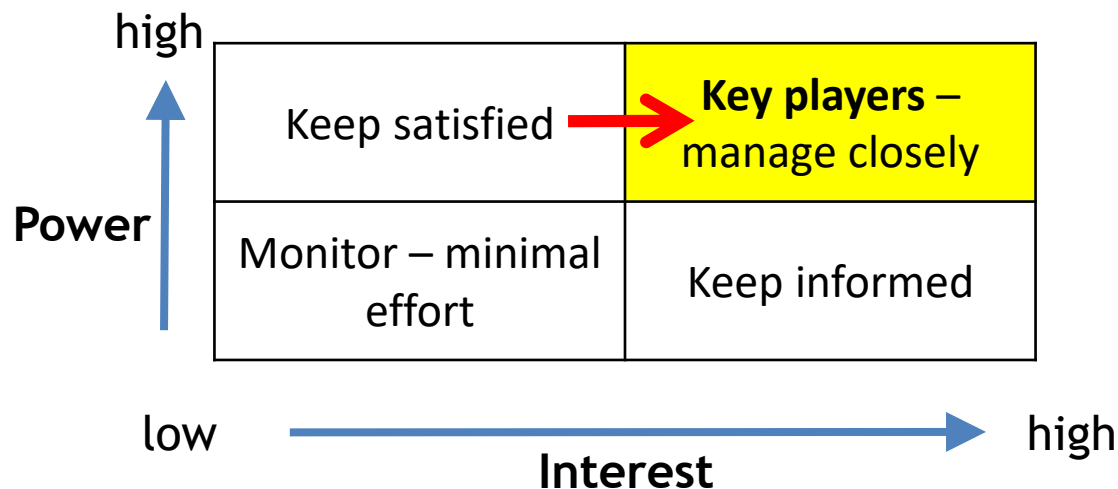
- Strategic Planning for Herbaria
 - 7-week Short Course taught in 2017 and 2018 by Austin Mast and David Jennings with guest lecturer Shari Ellis
 - Addressed vision, mission, stakeholders, strategies, goals, objectives, evaluation, sustainability, among other topics
 - Goal was a basic strategic plan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





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*





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



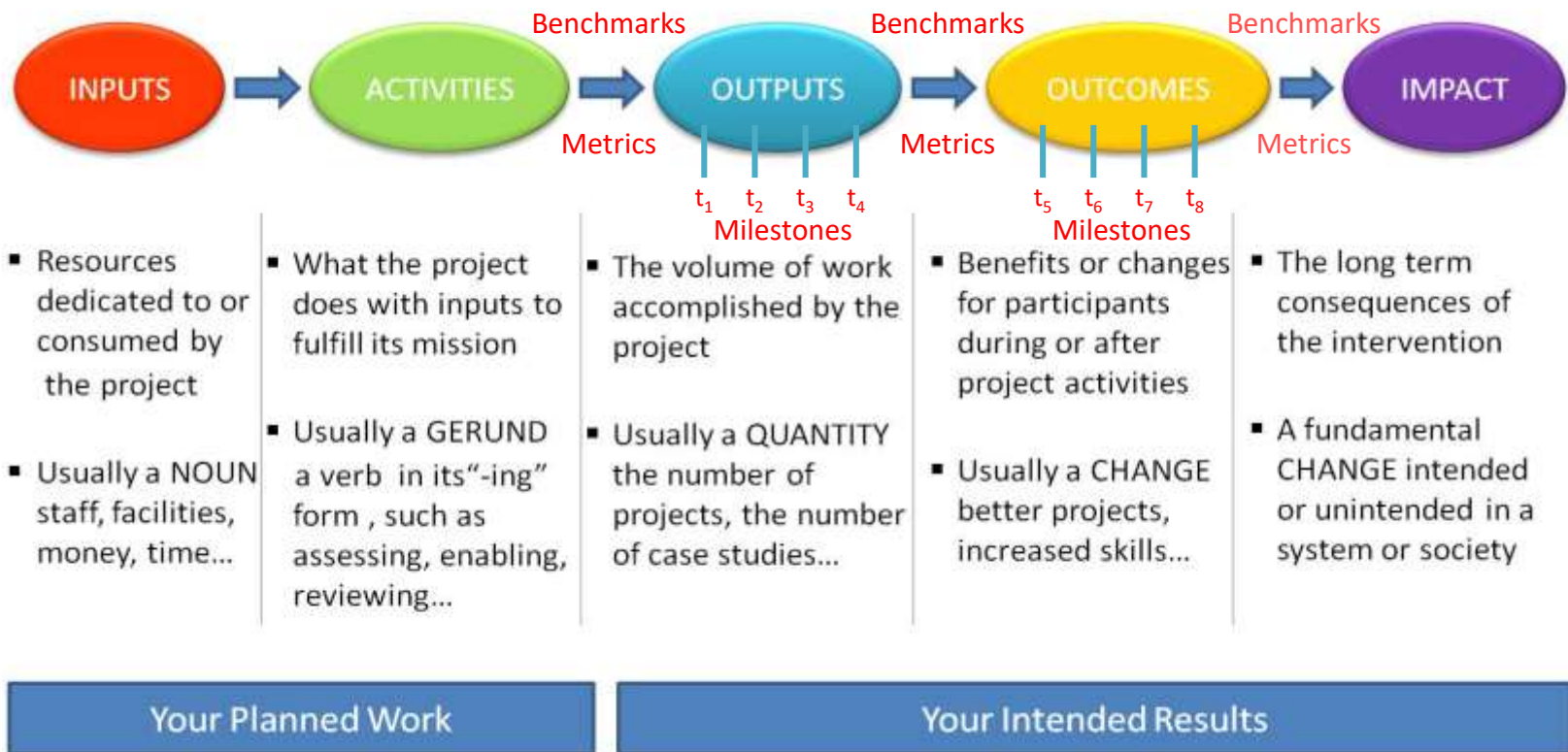
Some Terminology

- **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

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Thank you!

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