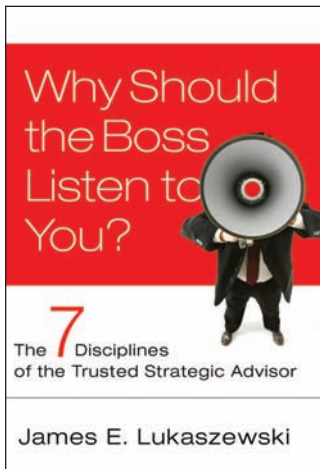




# Real advice for giving real advice

An excerpt from James Lukaszewski's

*Why Should the Boss Listen to You? The Seven Disciplines  
of the Trusted Strategic Advisor*



*A new book from James Lukaszewski offers concrete ways to help you deliver advice to executives in a way that makes them pay attention. The following excerpt outlines a six-step process for presenting recommendations that are timely and focused.*

## Advise Constructively: The Sixth Discipline of the Trusted Strategic Advisor

Most advisors, early on, tend to give advice in the context of their staff function or personal area of expertise. Typically, staff thinking and decision making are quite different from operational thinking and decision making. To succeed as a trusted strategic advisor to operating executives, you will need to align your thinking patterns and decision-making habits with theirs. This [excerpt] describes a methodology that helps you think and communicate using a more structured and process-driven format. When you use such a format, executives are able to understand your recom-

mendations and see how they relate to ultimate goals and objectives, without their having to do a lot of translating.

How information is structured when presented to management is very important. Whether the solution proposed is bold, obvious common sense, absolutely applicable, or brilliant and creative, managers will absorb advice better if it fits into their processing approach, builds on their intuitive skills and experience, and allows them to assimilate.

The chances of your advice being recognized and utilized increase if you structure it using the same template managers use to make their decisions. The elements of this template are *situation, analysis, goals, options, recommendations* and *justifications*. For decisions that matter, all six template elements will come into play. Omitting or skipping a template element subtracts from the value and completeness of the advice given. In fact, when I learned this approach, it was referred to

as the Concept of Completed Action; the source of this name has completely eluded me, but the value of the structured thinking and presentation approach has been a crucial ingredient in my own success.

Talk to time. Be brief. Avoid excessive talking. In addition to respecting the boss's time, brevity is important because concentrated, well-structured information presented verbally or in writing is powerful and more likely to be assimilated and owned by others. Information provided in tabbed manuals and called a "Plan" is likely to be ignored. Executives base most of their critical decisions on experience and intuition in conjunction with facts and information recently harvested through verbal interaction with colleagues and advisors, usually in a very short span of time.

## The Three-Minute Drill

The Three-Minute Drill is a time-sensitive, highly disciplined approach for presenting recommendations. If your strategic rec-

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ommendations fail to fit this timed structure, go back and rethink, make repairs and rehearse again. The drill is structured in six steps that impose a useful, sensible management decision-making structure:

- **Step 1: Situation description (60 words).** Describe the nature of the issue, problem or situation that requires decision, action or study. This is the factual or perceptual basis for “What we know now,” “Why we need to take the boss’s time, now, to discuss this,” or “This is a new and important topic that we need to talk about, now.”

- **Step 2: Analysis and assumptions (60 words).** Describe what the situation means, its implications, and perhaps how it threatens or represents opportunities. Include one or two key assumptions that validate your analysis. “Here’s why it matters.”

Managers always need to know the “why,” but not in great detail. They are also interested in the intelligence you possess or have gathered that supports your analysis and assumptions.

- **Step 3: The goal (60 words).** State the task to be accomplished (sometimes the reason or purpose for accomplishing it) or the goal or destination to be reached and why. “This is where we are headed.”

Goals provide focus. Useful goals are understandable, achievable, brief, positive and time- and deadline-sensitive.

- **Step 4: Options (150 words).** Provide at least three response options to address the

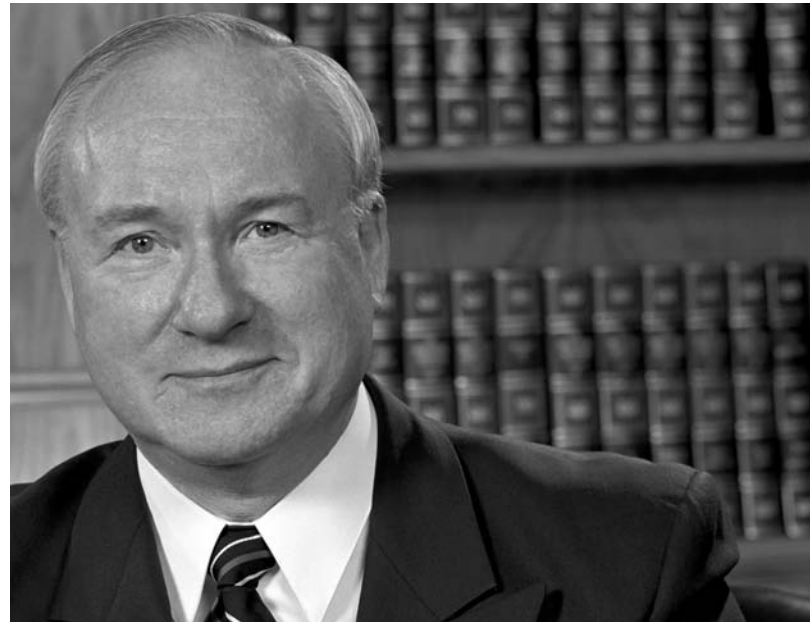
situation as presented and analyzed. Option one is to do nothing (the 0 percent solution); option two is to do something (the 100 percent solution); and option three is to do something more (the 125 percent solution). Providing multiple options is what will keep you at the table and avoids the high-risk strategy of making a single recommendation, which can be torpedoed by a single question....

- **Step 5: Recommendation (60 words).** Be prepared to make a specific choice among the options you presented. You will usually make your recommendation on the basis of which option will cause the fewest unintended negative consequences. This is where you earn your paycheck.

Many times I have heard advisors offer reasonable options, but when the boss ultimately asks the question—“What is the first thing I should do?” “What are the next steps?” or “Of the three recommendations, which would you choose and why?”—far too often the response from the proposer is, “Gee, boss, that’s a good question, and I need to think about that,” putting an end to the advisor’s usefulness in the discussion, at least in this round, and undercutting other advice as well.

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- **Step 6: Justification (60 words).** Every management decision or action has intended and unintended consequences that can be forecast. Inadequate



provision for consequences is what can sometimes sabotage an otherwise useful strategy.

As I mentioned in step five, when I think of consequences and strategy, I generally try to identify the solution option with the fewest negative intended or unintended consequences.

Strive to provide advice in this 450-word format (three minutes). It is powerful, it conserves management time, and, coupled with the discipline of suggesting three action options, it will get you invited back to the table again and again. Anyone who can spontaneously provide three decision options on the spot, every time, as opposed to whining and griping, is extraordinarily valuable. Keep this up, and you could become the boss’s first call when it matters.

### The options

My preference is to talk about doing *nothing* before anyone else does. My experience is that when the lawyers talk about doing nothing, the discussion sometimes ends right at that point. The discussion only resumes when some catastrophic

**Make your proposal to the boss as succinct as possible, advises James Lukaszewski, and be prepared by anticipating questions and concerns.**

Offer options that are useful, sensible and appropriate, options you can ethically and professionally execute.



Doing *something more* is the notion that resolving problems, especially those that are disturbing, stressful, or destructive to an organization, may require more than a minimally adequate response.

### about the author

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development or unexpected adverse situation occurs. My sense is that I'm often in the best position to discuss the impacts and costs of doing nothing better than any other staff function. Certainly human resources, finance, strategic planning, security and IT can also address the circumstance, but on issues that matter, where there are victims and serious visibility risks, doing nothing can be extremely costly.

This is a valid strategy option and needs to be discussed and debated. The option to do *something* is crucial. Most problems, although benefiting from some initial lack of action, do require some input of energy, resources, talent, and decision making if they are to be resolved. Having an action recommendation assists the boss in that crucial area called "what to do next."

Doing *something more* is the notion that resolving problems, especially those that are disturbing, stressful, or destructive to an organization, may require more than a minimally adequate response. Doing something more means going beyond meeting the letter of the law or the minimum, and taking additional steps that will further enhance the organization's reputation, assist those adversely affected, or repair a previous mistake. This approach is often the difference between a leader's solution and a manager's solution. Managers address only the known visible elements of a given situation. The leader's vision is to look more globally at the benefits of a larger effort or response concept.

Sometimes I'm asked, "What if there is only one appropriate

action for the boss to take? Everyone knows it, even the boss knows it, but there's resistance. Would it be possible to use this technique so that after you discuss doing nothing, you offer something you know the boss should do, and then something so ridiculous that the boss's choice is clearly obvious?" My experience has been that the more outlandish the suggestion you make, the more likely it is that the boss will select it. And, of course, because you suggested it, you'll be put in charge of making it work. That is a very risky strategy. Let the process of executive decision making play out. Offer options that are useful, sensible and appropriate, options you can ethically and professionally execute. Help the process of decision making move ahead through your remaining analysis and suggestions.

It's the boss's watch and the boss's career. That leaves the decision ultimately up to the boss. Whatever the boss chooses, you'll be there to help and advise.

### Death by question

The corporate execution method for new and big ideas is what I call death by question, usually at the hands of other staff functions. Suppose you have a wonderful idea for solving a serious corporate problem. Your idea is innovative, interesting, and somewhat different from the usual approaches. Rather than shooting your idea down by saying it won't work, it's not possible, it doesn't fit the culture, and all those other negatives, the execution begins with a series of questions. The first question might be, "Have you

run this by finance to determine the fiscal impact?" You probably haven't, which means your idea is now bleeding from a serious wound. Then comes killer question two, "Has human resources had a chance to review the impact on employees, service levels, and local operating structures?" It's another bullet, of slightly larger caliber. But they've saved the best and biggest bullet for last: "If you were given the go-ahead with your proposal, could you finance it completely out of your own budget this year?" Well, by now it feels like your idea is lying in a bloody puddle on the floor, and you are out of arguments and out of the game.

The concept of options is powerful, because it can withstand death by question. You may be shot down on one part of your idea, perhaps even a good part of the second concept, but it's rare that even a large group can shoot down three suggestions. Some fragment of your thinking is going to remain on the table. This means you will undoubtedly be there through the entire discussion.

Keep in mind that the ultimate decision may hardly resemble anything that you proposed, but as a trusted strategic advisor, you're still there, you're still in the game, you're still ready to offer additional options beyond the first set. This is one of the crucial values the trusted strategic advisor provides: a useful, restrained, but productive attitude that fosters ideas for tomorrow and helps move whole issues and circumstances to new levels of understanding and resolution. ●