

Achieving success in the C-suite



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Introduction

Competitive intelligence (CI) professionals are at a crossroads. Data and analytic tools have made it easier to parse through increasing volumes of data to provide timely, value-added analysis and insights; yet somehow these advanced tools have not resulted in greater traction with a key customer – the executive. This article addresses practical steps that the CI professionals can take to increase their visibility and effectiveness when working with senior executives.

The challenge facing competitive intelligence professionals

CI professionals are at a crossroads. Improvements in data and analytic tools have facilitated our ability to create better value-added analysis and insights and to better parse through the constant, ubiquitous stream of data that appears on our screens. This has resulted in a greater capability to harness external and institutional knowledge (e.g. social media, blogs and internal discussion forums) to inform business decisions. Yet somehow these advances in our information processing and analytic capabilities have not been translated into a greater impact in the area where it matters most – the executive suite.

This article explores the reasons behind this phenomenon. It explains why some CI functions become an integral part of an organisation's workflow – part of its DNA – whilst others never gain traction within organisations. At the individual level, it explains why some CI professionals become trusted advisors, whilst others are never able to influence decision-making and are relegated to back benching, news reporting and article clipping.

CI professionals seem to recognise this issue. In April 2016, the Strategic and Competitive Intelligence Professionals (SCIP) held its international conference in Orlando, Florida. One of the highlights of the conference was the lunchtime 'table topics', where like-minded people could congregate and, if necessary, commiserate. The topics were centred around industry themes such as defence, telecommunications and healthcare, as well as functional themes (e.g. technical intelligence, networking and trade shows). One of the most popular topics was 'mentoring', where a veteran CI person gave advice to a new-to-the-profession attendee. For most of the hour-long mentoring session, the majority of the questions and comments focused on how, as information professionals, we could increase our visibility and traction with the executives. For the past several years, these sessions have taken on a similar pattern. Questions and comments were virtually identical. Clearly, this topic of achieving success in the C-suite is both a timely and a timeless issue with information professionals.

Gaining traction in the C-suite can be difficult. Talk to any seasoned CI professionals and they will tell you the road to success is not an easy one. They have the scars to prove it. A good deal of it has been trial and error. The bottom line is that CI professionals are their own worst enemies. The philosopher Pogo had it right when he said, 'We have met the enemy and he is us' (Kelly, 1970) (see Figure 1).

There are fundamental mistakes CI professionals make. These are partly due to our DNA as information professionals and partly due to our incomplete understanding of how the C-suite operates. Luckily, these problems can be overcome with patience, practice and perseverance.

The best way to approach engaging with senior executives is to treat it as a battle. Sun Tzu had it right over two and a half millennia ago when he wrote the *Art of War*, which contains the following quote:

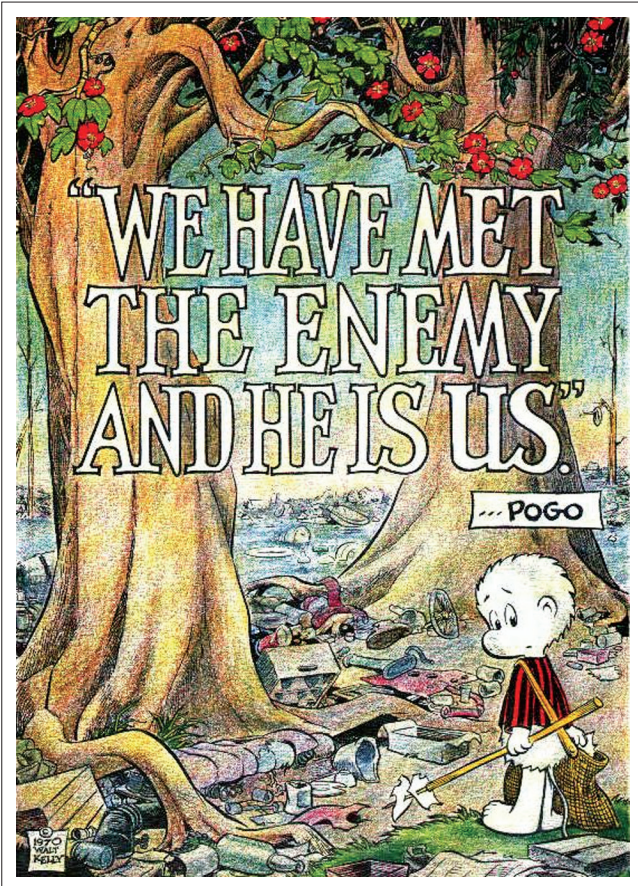
If you know the enemy and know yourself, you needn't fear the results of one hundred battles [故曰：知己知彼，百戰不殆；不知彼而知己，一勝一負；不知彼，不知己，每戰必殆] (Tzu 2007:n.p.)

He intuitively understood that it is not about you, but about them – it is not what you want to tell the executive, rather about what he or she needs to hear; it is not about how you want to convey the information, rather how he or she likes to consume it.

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Source: American comic strip, created by cartoonist Walt Kelly

Note: The Pogo quote is from a famous cartoon, made into a poster for the first Earth Day, held on April 22, 1970. The term 'philosopher' is a bit tongue in cheek. Pogo is the title and central character of a long-running daily American comic strip, created by cartoonist Walt Kelly.

FIGURE 1: American comic strip.

Many of the approaches and fundamentals of CI have their genesis in military intelligence (MI), which is a well-defined, long-standing art. It is not surprising that many MI terms, for example: 'threat assessment', 'war gaming' and 'situational awareness', have found their way into the CI lexicon. Analogies have, too. Here is an apt one: when you engage with executives, act as if you were going to battle. And if you are going to battle, you need to prepare. In the following, there are five rules to consider.

Mind your Ps and Qs

Ingrained in all of us at an early age was the need to mind your Ps and Qs. There are certain rules of behaviour, such as maintaining eye contact and addressing people with respect, which needed to be followed. These rules still exist today.

When meeting with executives

Always over-deliver, but never overwhelm

It is needless to say that you need to be well prepared for your meeting with the executive. Have more information than you need. Be ready to go into the details if necessary. Executives are a quirky bunch and you need to be prepared for anything. A good rule to remember when speaking with executives is to think of an iceberg: you are showing the

executive the tip. You are giving a summary. If the executive wants to delve deep, of course you can, and always be prepared to do so. Remember, time is the executive's most precious commodity.

Use appropriate language

This goes beyond cutting out four-letter words. Remember that your target audience is not as close to the information as you are; therefore, do not use acronyms and jargon. The phrase 'seamlessly integrate workflow solutions and streamline efficiencies in the supply chain' might make sense to you, but may cause the audience to scratch their heads. A good approach is to find a business colleague and rehearse the presentation before him or her. If he or she seems lost or confused, that is a good sign the executive will be as well. We are often so close to the data that we tend to use language that is comfortable for us, but not necessarily for an executive.

Tie to business results

What matters most to executives is showing demonstrable results. If the executive, for example, has responsibility for international sales, make sure that your presentation ties in to sales results. The more meaningful it is to business metrics, the greater impact it will have. Helping the executive make better decisions is the key to successful interaction. As a CI professional, your job – your *sole* job – is to prepare decision makers to make better decisions. To accomplish this, you need to know what business actions the decision maker is focused on.

Bring concepts to life

Fear is a great motivator. Nothing keeps executives up late at night like the fear of failure, the fear of missing out on the next big thing or the fear of making a bad decision. CI professionals should leave abstraction to painters and philosophers. Use concrete examples to make your point. Be realistic because this is what resonates with the decision-makers. For example, if you do this, *x* will happen; or if you do not do this, *y* will happen. Executives have a good understanding of what the implications are for certain actions, such as acquisitions and new product lines; however, they are less skilled at understanding the cost of inaction and its implications. For example, their thinking might be, if we do not make the acquisition it will likely be bought by our competitors and this will prevent us from entering certain markets. When you put issues in hard, concrete terms and not abstractions, your argument becomes even more potent.

Explore 'hot button issues'

You need to know what makes the executives tick. What are they passionate about and, just as important, what topics should be avoided? As CI professionals, many of us had to

create competitor profiles, which often included executive biographies that address facts such as education, awards, publications and work experience, as well as more complex issues such as management style, risk profile and personality. As part of your preparation for a meeting with executives, you should put together a profile (see below).

Ensure consistency and alignment

The essence of marketing tells the same story over and over until it sticks. You can present new ideas, but show you have thought about the traditional ones and dismissed them. For example, if you argue for a push for acquisitions in a new geographical area, include why you do not think growth in the traditional businesses is the smart move. New ideas are welcome, but they need to be based on business realities. This demonstrates cultural attunement. It also shows that you have done your homework, which adds to your credibility.

Remember to bottom line up front, fast

This is not an advertisement for going into a meeting and trying to fast talk an executive. Instead, bottom line up front, fast (BLUFF). Treat every opportunity with an executive as a fleeting event, something that could end promptly. Make sure your conclusions or findings are at the beginning of your work or presentation. You would hate to find yourself cut off halfway through a presentation without making your key points. Structure your work accordingly.

There was a cryptic comment earlier about our failure in the C-suite being genetic, a function of faulty DNA. Let me explain: as information professionals, we take pride in how we collect information, synthesise it, analyse it and turn it into intelligence. What we fail to recognise is that the executive has no interest in 'How we did it' or 'What we did'; the executive is only interested in the 'So what' and 'What does it mean'. The executive is looking to you to help solve business problems, not to tell them what the problems are and explain how you would solve them.

CI professionals take pride in the work they do and want to explain how they did it (let's face it, our training taught us to be methodologically rigorous). However, for the executive, this is table stakes. They assume that we are smart and we know our stuff, or we would not be talking to them. We need to fight this urge to tell them what we did and instead focus on what it means. Always ask the question, 'So what?' If you cannot answer that, then it is time to retool your comments or presentation.

Recognise the differences

When you meet with executives, it is important to realise that they are a different breed from you and me. They have different priorities and responsibilities than we do. Earlier we spoke about creating a profile of executives. As CI professionals, we have no doubt that at some point in our

career we need to put together our competitor profiles. These snapshots of competitors may or may not contain a section on profiles of senior executives. Yet, very rarely do we do this internally. If we did create profiles of our senior executives, we would find some interesting facts.

Salary

In the United States, a chief executive officer's (CEO) compensation is 369 times that of an average worker. In Europe, the salary of the CEO is about 20 to 30 times that of the average worker. Different pay grades result in diverse ways of viewing issues and varying motivations. Executive compensation is tied into performance factors and organisation metrics that help shape their agendas. Understanding what underpins their thinking and what motivates them is central to effectively communicating with them.

Lifers

Fifty per cent of the CEOs at America's largest public companies have been found to be in the same company for their entire career. European CEOs have spent an average of 13 years working for their current company. This dispels the common myth that CEOs are job hoppers. This has important implications for CI professionals – CEOs know their business. Many executives have worked in multiple business lines and, therefore, have a broad perspective of company operations. We do not need to educate them, as we tend to do. Do not waste time with information about the company – assume that they are knowledgeable. Focus on the essential intelligence that needs to be conveyed to support their decision-making.

Pressure on CEOs

Executives have a different constituent set than you or me. More than likely, you only have one boss. CEOs, at least of public companies, have to answer to shareholders, a board of directors and Wall Street analysts. They need to take factors into account that we do not have to, but it is important that we understand them.

Other pressures that CEOs face include data that show CEOs have only five fiscal quarters to prove themselves. Nearly 50% of a company's reputation is linked to CEO reputation; 73% of CEOs considered quitting in 2014, all data pointing to the great amount of pressure that executives are under.

When communicating with executives, always try to put yourself in their shoes. Look at issues from their perspective. What makes perfect sense to you might be patently absurd when viewed through a different lens. Understanding what challenges (business, technical and financial) executives face will go a long way in helping you understand what support you need to offer them and how you need to offer it.

Getting information on the executive team is not difficult. There are multiple sources you can talk to within your

organisation, who can provide valuable insights. You can talk to people who interact with the executive regularly. To those people who provide the executives with regular deliverables, find out how they like the information presented (what format, style, etc.). Talk to other executives or their direct reports. Some say that the executives are inaccessible.

Many CI professionals have claimed that whilst it is easy to collect competitor information, turning that same skill set internally to profile executives is very difficult. Politics is most often given as the reason. If you provide the right value proposition to the executive, you will never be turned down. Flatter them or play to their insecurities. Whatever the approach, remember to think about it from their perspective. As a final resort, go to the source of all information: the administrative assistants. It is well worth your time to befriend them. They are not only the keepers of the calendar but also the executive *consigliere*. They spend more time with the executive than anyone else and are therefore uniquely qualified to help 'understand' the executive. They are generally very protective of the executive; therefore, you need to formulate a game plan ahead of time.

CI professionals need to be thick-skinned. If a CEO does not agree with you, or does not appear to follow your recommendations or advice, you should not take this as a personal affront. There can be multiple reasons for this, principally because you are not privy to all the factors that go into their decision-making process. We would be foolish to think that every idea we present to the CEO would be acted upon. Think of a baseball player, where getting three hits out of 10 is considered very good. The key is not whether the executive acts on what you say to him or her, rather that he or she takes the information into account as he or she sorts through a vast amount of inputs. As long as he or she respects your views, that is important and will guarantee institutional longevity.

Pick and maintain a voice

Remember that you are the subject matter expert. You know the topic better than anyone else. It is important that you come across as an authoritative figure. Have conviction; do not be wishy-washy. Executives appreciate it when you take a stand. They are paid to make the hard decisions and respect people who provide them with clear options and recommendations. The work you do should always have your fingerprints on it and your views should always be specific. That said, you never want to appear to be preaching from the soapbox, you need to come across as a voice of reason.

You should also strive to get your point across in as few words as possible. The Gettysburg Address is a perfect example of this. President Abraham Lincoln's address is generally viewed as one of the greatest speeches of all times. Yet the Gettysburg Address was short, only 272 words long. It was written in simple English; of those words, 206 were single syllable words. No jargon, just ordinary vocabulary. In a 2- to 3-minute speech, Lincoln was able to effectively capture the sentiment of the Civil War. Every time you meet

with an executive, make it a Gettysburg Address. Be bold, be brief and be gone.

Be a salesperson

CI functions are found throughout organisations, most often in the strategy and marketing departments. Occasionally, these functions can be found in technical or product departments. One of the more popular places to house the function is in the marketing department. I have personally started up two functions that were under the CMO. It is ironic that whilst CI departments are often found in marketing, CI professionals are poor marketers. There seems to be a pervasive myth throughout the profession that CI professionals need to fly below the radar, and that we should operate in the background. Perhaps we have Jack Ryan (protagonist in the Tom Clancy novels) to blame for this – too much cloak-and-dagger fiction seeping into the corporate mind set. Regardless of the reason, CI should not operate in the background. Because of our collective hubris, we believe that the work will speak for itself and that is what will propel us to greatness. This is a formula for disaster and will ultimately lead to the extinction of the function. A hard cold truth of corporate life is that nobody gets to the corner office without being seen, heard and recognised for the good job that they do.

So what we need to do is sell ourselves and sell the function. If you think about your time in the office, most of us will spend only a small sliver of it actually engaging with executives. The trick is when we do get face time, video time or any time, we need to maximise our impact. It surely would be great if you ensured that your reputation preceded you. One of my greatest sources of pride was attending a meeting with executives where I was told, 'I've heard great things about your work' or 'So and so tells me this is a great job and I look forward to hearing about it'.

One of the best ways to do this is to build up champions throughout the organisation. A champion does not necessarily have to be your boss, your bosses' boss or even someone in your department. He or she does, however, need to have four characteristics: (1) be senior, (2) have a voice, (3) be smart, and (4) be committed.

The person should be senior enough that he or she carries weight within the organisation and people listen to him or her. The person has to be vocal – silent supporters do you no good. He or she has to be CI smart, understand what you do and recognise the value you provide to the organisation. It is your responsibility to train people to understand the role of CI in the organisation. Finally, people need to have skin in the game. Your champion should have a vested interest in your success. Whether the person relied on the great work you do or lobbied for the creation of your function, he or she is going to be motivated to see you succeed because his or her success and/or reputation depend on it. He or she is motivated.

You might not regularly meet with the executive, but others do. Find out who does – all it takes is a little homework or a

serendipitous meeting with an administrative assistant at the cooler. Support these people in any way you can – slavishly cater to their needs. Build a constituency. It certainly makes your road to the C-suite less bumpy.

You should always work to develop your brand. Your products should have names, all the better to differentiate them. The catchier the name, the easier it is to remember. Your group should have a logo or some type of identification mark that appears on all your work. There is a story about a senior executive who had a great branding trick. Whenever the executive produced a document, the executive printed it on canary-yellow paper. When it hit someone's desk, it was easily identifiable, and you could choose not to read it, but you always knew who it was from.

Be a shameless promoter, but make sure you deliver. There is absolutely nothing wrong with tooting your own horn. Take credit where credit is due. Of course, you need to be able to deliver. You are fighting out there for limited resources and it is important that you let people know the good work that you are doing. Every other function is busy promoting itself. Why should you not?

For example, to keep people informed of what the CI group is doing, you could put together a quarterly CI update – a 4- to 5-minute PowerPoint show with voiceover and animation, which serves a number of purposes. It provides three important functions: it keeps people aware of what you are doing, it highlights your products and services, and it helps manage people's expectations. Podcasts seem to be a very popular medium nowadays for this type of promotion. You should experiment with a few media to see what works best – you might even need to use more than one.

Provide insights

It is important to stay focused. For the CI professional, it is all about creating timely and actionable intelligence that

gets in the hands of the right people at the right time so that they can be better informed decision makers. Prepared documents must always answer 'So what/What if?' (There are a number of variations to this question, but the bottom line is that you need to provide intelligence to the executive so that he or she can make better informed decisions.) If the document does not have this insight, then it needs to be reworked. Executives are myopic in that they are only concerned with two things: how they can help grow the top line (e.g. increase revenues or sales) or how they can help cut the bottom line (e.g. save costs or increase margins). Any intelligence you supply that does not support these two needs is superfluous.

The biggest problem I find with CI professionals when they enter the C-suite is that they tend to focus on information and not intelligence. Remember to focus on what they need to know, not what you want to tell them. Do your homework, put yourself in their shoes and ask the simple question to yourself the simple question: 'What do I need to tell them that will help them make a better business decision?' It is that simple.

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