

PRESENTING TECHNICAL INFORMATION TO MANAGEMENT

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During the past twenty-plus years of working in technical areas, I have had the opportunity to present technical information to management on many occasions, and have been present when others did the same. Hopefully, using some of the guidelines I have developed for myself from my learning-by-fire experiences will help you succeed in achieving approval for your proposals. I have organized these "rules" into the following categories:

1. Knowing your subject.
2. Knowing your audience.
3. Selecting the material to present.
4. Organizing the presentation.
5. Presentations do's and don'ts.
6. Why proposals are accepted/rejected.

A lot of the information contained in this paper may be considered "pretty simple stuff" or to be "obvious". What leads me to believe the contrary is true is the number of times I have witnessed great ideas and opportunities being rejected because of a failure to effectively use some of the following "simple stuff".

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I. INTRODUCTION

Generally when you are presenting technical information to management, it is not because management is interested in learning about all the wonderful and neat things you do; usually, it is to gain approval to spend money in some fashion, such as capital acquisitions, additional staff, training, supplies, services, etc. Thus we come to the first and main rule.

Rule 1: Remember that the sole function of your presentation is to gain approval for your request.

All other ideas and concepts which you consider in preparing your presentation must be subservient and compatible with this rule. Straying away from this rule will usually get you in trouble and frequently leads to rejection of the proposal. If you want to stop reading now, just try and follow Rule 1.

II. KNOWING YOUR SUBJECT

When I was a Boy Scout, it was called "Be Prepared". This is such a simple task, especially for the technically oriented person, that you might wonder why it should be mentioned. Very simply put, this is one area in which "Instant Death" can be delivered to your proposal. Over the years, I have seen several proposals rejected in the middle of the proposal because the presenter had failed to adequately prepare himself/herself and could not answer a relevant question.

Knowing your subject is similar to studying for a final examination. You really don't care about all the information; however, you must be prepared to answer any question with a sound answer. Lets look a simple example contrasting the unprepared with the prepared.

You are making a presentation to acquire an uninterruptible power system for the computer room. You know the power requirements of all the computer hardware and have built in a 100% contingency for growth. You are asking for capital to acquire Model XYZ to provide this capability so that you can be on-line to all users the moment power returns to the rest of the plant. All is going well when the following question comes up.

Scenario 1;

Question: "Does this power the air conditioner also?"

Answer: "NO" << Your in trouble, you don't know. >>

Question: "Won't the computer shut down if it overheats?"

Answer: "Yes, but most power failures only last a few seconds."

Question: "Could the air conditioner be added to the uninterruptible power system without overloading it?"

Answer: "I don't know." << Sure Death !!! >>

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Scenario 2:

Question: "Does this power the air conditioner also?"

Answer: "Yes. We investigated the additional power requirements to keep the computer room cool for as long as the power was out of service. We found that a simple switch could be installed in the air conditioner which would require only the unit associated with the computer room to have power. By doing this, the power requirements are minimal and fit well within the manufacturer's guidelines. When we go over the detail expenditures, you will notice a cost of modification of the air conditioner which reflects this hookup.

By the way, Sir/Madam, I would like to complement you on a very good question."

Based upon the above scenarios, you can see the effect of being prepared. Put yourself in management's shoes. Which answer gives you the greatest belief that the requestor knows his subject and can successfully complete the project.

Rule 2: Know you subject.

III. KNOWING YOUR AUDIENCE

The second area in which I have seen a great many proposals die is by not communicating effectively. I have seen computer "nuts" start talking about the EGA vs. the VGA cards; the fact that average seek time is 5 milliseconds faster with disc drive B rather than A; the relative speeds of disc cacheing in memory versus disc caching on drives and the associated effect on memory use; and, equally interesting other "techno-garbage".

Of course, if you glance at the officer(s) who must approve this expenditure, you see sort of a glazed look in their eyes, or worse, a look questioning the sanity of the speaker, or still worse, a look of disapproval for wasting his/her time with such a presentation.

The idea here is to forget, forever, any hope you have of "teaching" management. This is in direct conflict with Rule 1. Learn to present your story in terms your audience already understands. This requires you, the presenter, to find out ahead of time something about the background of the key players to whom you will be making your pitch. I have seen instances where ten's of thousands of dollars were spent analyzing a technical situation, more thousands spent in trying to derive the best possible solution, and then watched the entire effort go down the drain because only a very minimal effort was spent in preparing the presentation.

Telling (or Selling) the story effectively to top management is usually far more important to the success of your proposal than knowing with great precision all the facts related to your proposal.

Remember that your job is to improve things and go forward. The single greatest difficulty technically oriented people usually have to overcome is learning that gaining approval for a request is rarely based upon the technical merits of the proposal by itself.

Rule 3: Know your audience.

IV. SELECTING THE MATERIAL TO BE PRESENTED

Perhaps the most difficult facet of presentations I have had to learn over the years is in selecting what material should be presented from a giant sea of "really great stuff".

I try to remember that my objective is not to train the audience to be technically competent in my field. Instead, I select those few facts which directly and dramatically support the picture which I'm trying to paint. Suppose we are trying to request that one million dollars be spent in the next years budget to expand the computing power of the current system. This will include migrating from Series 70 to Series 950 computers, something to which I hope you can relate. Rather than show a series of slides which show the increase in number of users, number of transactions, number of reports, electronic-mail volume increases and other such phenomena, I would rather show a single chart which shows past and projected response time as excess capacity dwindles to zero and an overloaded CPU is achieved. This chart could be compared to the dollars in labor which could be saved by having sufficient computer response to maintain high productivity in computer related activities.

Top management cares about lost productivity when workers sit in front of a terminal doing nothing except waiting on a response from the computer. I would be very surprised, however, if top management would be interested in the fact that the number of packets of data transmission increased from 1.6 to 1.8 million per day during the last month and show a steady 15% growth per month. The old adage is "KISS" or "Keep It Simple, Stupid".

One of the questions I ask myself is, "Would this hurt my objective if I removed it from the presentation?" Usually, the answer is that the presentation would be more effective without it.

The second thing I have learned in this area (and at a very great expense to me), has been that the more area you cover, the more likely you are to strike someone's hot spot. Regardless of how well you think you know your audience, if you don't restrain yourself in this area, you won't be around long enough to know your audience at all.

Rule 4: KISS

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V. ORGANIZING THE PRESENTATION

Several years ago, I had a boss, mentor, to whom I'll be forever grateful. Of the many things he taught me, one was to be up-front when asking for money. In fact, he had a rule that the first sentence of any written request should contain the dollars being requested and the reason for the request. There have been times when I have worked for two days to write the first two lines of a request. They are the most important lines of the request. Often a manager will make his/her decision by the time the first half of a page is read. Rarely will a key decision maker even read the appendices.

Thus you must sell your idea at the very beginning of the presentation. If you turn off your audience or lose them at the start, the odds are that you will never recapture them or win them over to your side. In some proposals, there exist some costs because people will need to be re-trained or reorganizations will be required. Think of this as a game in which the score must always be positive in your favor. First, tell them about the good things you are going to accomplish. After that, the cost required to accomplish these things seems much more palatable.

Rule 5: State the dollar cost and expected accomplishments at the beginning.

Rule 6: Present the positive things you expect to achieve prior to any requirement which could be viewed negatively.

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VI. PRESENTATION DO'S AND DON'TS

Although this entire paper is about presentations, there are some really simple things that the uninitiated might not fully appreciate. Over the years, I have seen people fail to get approval, wreck their career, or put themselves in a position of ultimately leaving the company because they failed in one of the following areas. Alternatively, others have received promotions, bonuses and new opportunities because they did it right. This is not meant to be a comprehensive list, but represents only some very key points.

1. Be honest.
2. Be positive and confident.
3. Demonstrate you know your subject.
4. Be receptive when ideas are presented to "improve" your proposal.
5. Be serious, but maintain a sense of humor.
6. Dress appropriately.
7. Speak / write clearly.

In summary of the above,

Rule 7: Maintain an even keel.

VII. WHY PROPOSALS ARE ACCEPTED / REJECTED

I have come to the conclusion that proposals are generally approved because the top management involved believes in the person, not just the idea.

My second conclusion is that most proposals are rejected because of a lack of ability to communicate effectively with management, not because of an incompleteness in research or an unworthy idea.

My third conclusion is that the timing of a proposal is critical. Furthermore, if a proposal is ever rejected because a lack of funds during a period of austerity, it will be much harder to win approval if requested a second time, even if requested in times of prosperity. If you believe that approval is not probable or is questionable, then don't ask.

Rule 8: Time your requests carefully.

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VIII. SUMMARY

Your career rides on your ability to sell your ideas to management. Do your homework. Time your proposal carefully. It's a lot easier to get approval for your next proposal when your last request was approved and successfully implemented. When you complete a project on which key management personnel had to give their approval, make sure you inform them of the success and thank them for their assistance and support.

Rule 9: Ring your own bell.

Rule 10: Thank the appropriate people.

I hope the aforementioned guidelines will make it easier for you to get approval for your next proposal.