CHAPTER 1

DIAGNOSING THE WHAT AND THE WHO

Diagnosis starts because there is an event, an important meeting or a key presentation in your calendar. It could be an important conversation or even an interview. Capturing the relevant information for the context is the first step.

What is the context?

What you call the communication 'event' matters (see figure 1.1, overleaf). A meeting is different from a discussion. A discussion is different from a debate. If it is in your control, frame the context to serve the audience and outcome. Take these examples:

> *'Hi Julie, is it possible to have a quick* chat *about the project for about 30 minutes?'*

'Julie, we need to have a meeting *about the project; 30 minutes should cover it.'*

'Can we workshop *an idea for the project, Julie? Thirty minutes max?'*

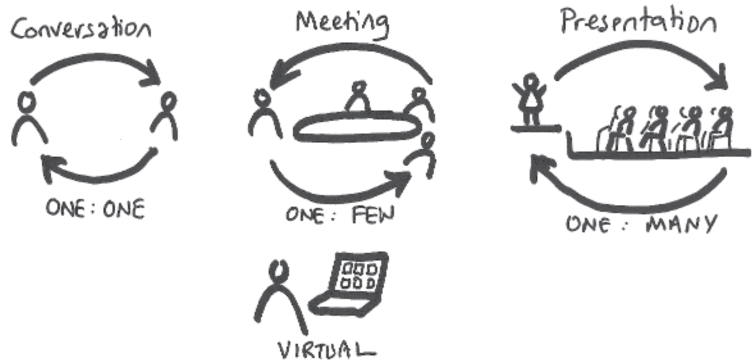

Figure 1.1: Communication contexts

Each of these scenarios is 30 minutes; however, the name provides a different context from Julie's point of view.

Obviously, in a one-to-many situation, it could be a presentation, pitch, workshop or panel discussion. Once you've defined the context, the next step is to describe your role. This is straightforward if you are leading the meeting or are the keynote speaker. Often, though, you are part of a team where you could be adding your expertise for a section of the conversation or presentation. This influences the later design and delivery elements.

Finally, the next step is to identify whether it is an in-person event versus a pure virtual or blended set-up. Again, this will inform the next step: your design (see Part II).

Time to work

Think back to the high-stakes conversation, meeting or presentation you identified on page 2. Describe the context and your role using these prompting questions.

- What is the type of communication? Is it a presentation, meeting, pitch, briefing, workshop or conversation?
- What is your role? Are you the leader, a contributor or participant?
- Is the event virtual or live?

What is the topic, subject or theme?

I had a conversation with an executive who is taking his leadership team to an offsite.

'What is the purpose of the two days?' I asked.

'We will do some strategy work, team building, that sort of thing…'

Of course, I challenged him.

'You are taking 12 people away, for two nights and two-and-a-half days to a lovely rural property, and the theme of this leadership offsite is "strategy, team building, that sort of thing"?'

Being explicit about the topic, subject or theme of the communication event is critical for your following design work in Part II. Specificity is the key to this.

At this stage, you describe the big picture, the conceptual frame, for the communication session. Often this is very straightforward; for example, this could be an annual performance review. Done.

We have worked with clients on their annual sales kick-off meetings, and when asked what the core theme is, we hear the same old generic descriptions: 'one team', 'succeeding together', 'winning mindset'.

These themes are common and generic, and this dilutes their intended impact. Over the past ten years or so, we have been part of 12 different conferences and events where the theme was 'Evolve'. The organisers thought their event theme was unique and clearly captured the sentiment. Evolve is a fine word. As a theme, it's bland and, to use a wonderfully descriptive word, a bit meh.

Some years ago, I was speaking at an event at Manly, Sydney. The theme was 'There be dragons'.

What do you think of when reading those words: 'There be dragons'? Curiosity? Intrigue? Confusion? Interest?

These are all better emotive responses than 'meh'.

The master of ceremonies walked on and opened with 'There be dragons' in a classic pirate voice. He went on to explain that 'there be dragons' is a phrase that has its roots in medieval mapmaking. During the Middle Ages, cartographers would often include illustrations of dragons, sea serpents and other mythological creatures on uncharted areas of maps. These depictions served as symbols for unknown territories and dangers, essentially warning explorers of the potential perils they might face in these unexplored regions. The theme related to the unchartered waters the company strategy was heading towards. Clever theme. Memorable. Better than 'Evolve'.

This also applies to presentation titles. If you were attending a presentation on 'Risk management and mitigation', you may assume it's going to be something super technical and potentially dull. Calling the presentation 'Risky business: Mastering the art of safe play' would get more attention. It's more likely to build intrigue.

DIAGNOSE

Time to work

Building on from the previous exercise where you identified your context, describe the central theme of your communication.

For example, is it a project update, delivering research results, discussing strategy, planning for Q4, brainstorming the risk challenges of artificial intelligence, tracking marketing performance, sharing leadership challenges, and so on? Be specific. Name the project. For example. 'Four-week progress report on Project Delphi', 'Employee survey results November/December', 'Reworking the GTM to counter Microsoft' — or be creative and find your own 'dragons' title.

Who is who?

A question we often ask at the start of our programs is: 'How many of you find people fascinating?' followed by 'How many of you find yourselves fascinating?'

Human beings are complex systems. We are all trying to utilise a blend of our physiological, psychological, neurological, emotional and intellectual systems at any given moment. We are riddled with programmed biases; operating on a myriad of foundational beliefs and value systems; dealing with the simple challenges of living our own lives; not to mention the complexities of families, relationships, collegial stuff, personal ambitions and various proclivities from the mundane to the weird.

It's almost arrogant to think we have the ability to influence anyone given the knotted complexity any human being is at any given moment.

The more you understand the psychological, intellectual and emotional make-up of another person, the more likely you will be able to communicate with greater accuracy and relevance. We are all guilty of being too superficial in our understanding and appreciation of others.

Not too many years ago, I worked with a business leader in the banking sector. This was one-on-one coaching, helping him establish his leadership brand. His ambition was to ascend to the executive leadership table, and ultimately be a CEO of a large financial sector organisation. At our first meeting, I asked him to give me a little insight into his background. I had his professional history, of course.

I had made some assumptions. In my mind, he had been born into a fairly wealthy, connected family, had attended good schools where he excelled, and achieved similar results at university. The story I made up in my mind was that he was fast-tracked because of his intellectual clout and the power of his network — perhaps with some family influences thrown into the mix.

Wrong.

He came from an extremely modest (and brutal) background. He was the antithesis of privilege. One of his driving values was supporting struggling people in our communities. Knowing this allowed us to tailor our work precisely. My original assumption could have left me focusing on purely commercial outcomes, driving up the share price and running a lean, clean operational machine. Instead, I realised his purpose was deeper than standard business objectives. We focused on building his leadership philosophy, his messaging and how he could contribute to customer and community benefit while still meeting or exceeding commercial goals.

Influencing starts with understanding, appreciating and respecting the people who you will be communicating with, and we need to start with the basics.

So how do you diagnose who's who in the room?

There are numerous ways you can diagnose who is going to be receiving your communication. Some scenarios (such as a weekly meeting) will obviously be easier than others (such as delivering a keynote speech to a conference).

Time to work

Let's get specific. Now that you know your context, identify the key stakeholders. What are their names, roles and locations? Are they supporters, resistors, sponsors, neutral or hostile? Ask around, use experience, use others' experience, stay awake to how people you work with operate. Look for patterns. To be a person of influence, you have to be profoundly interested in the people you are seeking to influence and support.

LINKEDIN

Depending on the size of the audience, you could choose to access the LinkedIn profiles of everyone in the room. You may have access to other platforms, both internal and external, where biographical information can be sourced. Researching this gives you foundational information, from which you can look for patterns, anomalies, points of interest and the like.

We sometimes get pushback from people suggesting this is too time consuming. The decision you have to make is how effective do you want to be as a communicator, as a person of influence? We don't question exceptional athletes for working harder, longer and with more discipline than their fellow athletes, so why would it be any different for exceptional influencers?

To give you some perspective, one graduate program we run has over 200 delegates, and I, personally, spend eight hours researching each and every participant, demonstrating to them, in the early days of their career journey, that preparation is the breakfast of champions.

Analysing someone's LinkedIn profile can provide a wealth of information about their professional background, skills and network. Here are some key aspects to focus on:

PROFILE SUMMARY AND HEADLINE

The summary and headline give an immediate impression of the person's professional identity. Look for keywords that point to their industry, expertise and professional interests. Some summaries are chatty and personable, providing a sense of personality and style.

EXPERIENCE SECTION

This is crucial for understanding their career path. Look at their job titles, the companies they've worked for, the duration of each role, and the responsibilities and achievements listed. This tells you not only about their experience, but also about their career progression and stability.

EDUCATION

Check their educational background to understand their foundational knowledge and skills. This includes not just degrees, but also certifications and special courses.

SKILLS AND ENDORSEMENTS

This section shows what skills they consider important and how many people have endorsed them for these skills. It's a good indicator of their strengths as perceived by their peers.

RECOMMENDATIONS

Written recommendations provide insights into how colleagues and superiors view the individual. They can reveal aspects of their work ethic, team dynamics and professional impact.

ACTIVITY

Reviewing their posts, comments and shares can give you a sense of their professional interests, views and how they engage with their network.

ACCOMPLISHMENTS

Look for any awards, publications, projects, patents or speaking engagements. These can highlight special achievements and areas of expertise.

VOLUNTEER EXPERIENCE

This can provide insight into their personal interests and values, as well as additional skills.

CONNECTIONS AND NETWORK

The size and nature of their network can be telling. Look at who they are connected with — peers, industry leaders, diverse professions, etc.

GROUPS AND ASSOCIATIONS

Membership of professional groups suggests areas of interest and ongoing engagement in professional development.

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Remember, the LinkedIn profile presents a carefully curated version of a person's professional self — it won't tell you the *whole* story.

REPUTATION

The assessment of whether a participant is a sponsor, supporter, neutral, resistor or hostile can be drawn from your own experience in most scenarios; however, getting perspectives from a wider group of people increases the accuracy of the diagnosis.

In preparing a client for a major career move, we did the diagnosis on the people on the interview committee. There was one HR person who was an unknown quantity. Reputation research identified that the HR person was famous for being belligerent and challenging. Further digging revealed that this HR exec did the belligerent routine as a test of resilience to assess how the interviewee managed threat and stress. To discover this, we connected with people in his network, read their LinkedIn articles and posts, and found a few articles in trade journals. One article in an HR magazine covered his 'good cop, bad cop' routine in how he conducts interviews. It was all there.

'If I hadn't done the diagnostic, I would have found it extremely difficult not to take it personally. He went into full a-hole mode', our client told us later.

He got the job.

Big audiences

All hands, town halls, conferences, events and the like are a one-to-many delivery. Here the diagnosis is to find out what the current sentiments, concerns and issues are in play. Where we have seen poor diagnosis time and time again is in internal all hands presentations. This also becomes more challenging in virtual contexts.

One client in the banking industry in England was disturbed to discover that about 50 per cent of their staff logged onto an all hands call remotely rather than attending in person. Because of tech issues, they stopped the all hands after 12 minutes, letting everyone know that the meeting would be held two days later. Only half of the attendees logged off; the other half were not at their desks to hear the news of the cancellation. Their managers were notified to follow up. Many excuses were made … everyone knew the truth. The employees logged in to demonstrate attendance and then did other stuff.

The feedback to the organisers was clear. The all hands calls were so bad, so irrelevant, that 50 per cent of their employees found other things to do, perhaps catching up with the latest episode of *Love Island*. Who knows?

Big audiences require a much more considered relevance design. Attend any live conference and stand at the back of the room. People vote with their devices. If the speaker is seen as irrelevant to them, their heads drop to their phones or similar.