



MINEFIELDS, HIDDEN AGENDAS, AND ALLIES

EPISODE 1: THE AMBUSH

BY TED HARRO

Prologue & Cast of Characters

Most successful leaders say that building productive working relationships with key colleagues is among the most important activities a leader can engage in during the first few months in a leadership role. What does that look like in real life? In this series of articles, we follow the path of Ben Scott as he begins work as Chief Marketing Officer for Software Magic, a fictitious technology consulting firm.

EPISODE 1 IN SUMMARY

- Through hard experience, Ben discovers the First Law of Influence: Know your colleagues.
- Through conversation with a mentor, Ben learns an approach to discovering his colleagues' hidden agendas and interpersonal preferences.
- Ben starts down the road to more constructive relationships with key colleagues.
- We offer a proven pattern for discovering the business agendas of your key colleagues.

Here is the cast of characters you will meet in this first episode:

- Ben Scott has fifteen years in increasingly responsible marketing roles in professional services firms. He has an MBA from a leading business school and plays jazz guitar in his spare time. The Software Magic role is his first firm-wide marketing role.
- Jan Thomas came to Software Magic from the parent company, NovaStart. As managing director, she has overall responsibility for Software Magic's business performance. She has a reputation for being a no-nonsense leader and performs exceptionally well with clients.
- Jim Hopkins leads the largest office in Software Magic. The prototypical hard-charging rainmaker, Jim has risen through the ranks at Software Magic and has enormous influence with his peer group.
- Paul Morris runs Software Magic's Financial Services group, the firm's largest industry sector. He came from the industry five years ago and quickly distinguished himself as a sought-after resource by leading clients.
- Terry Dennis was Ben Scott's first boss at an IT shop across town. He remains a respected member of that firm and of the consulting community in the city.

Episode 1: The Ambush

The View from the Eighth Floor

Slightly stunned, Ben slumps into his office chair. He stares blankly at partially unpacked cardboard boxes. A photo of his smiling, young family catches his eye. He shifts his view to the city streets eight floors below. People bustle by. They are absorbed in their own little worlds – just like Ben.

But behind Ben's absent expression, his mind churns over the events of the last 45 minutes. "What just happened?" he wonders to himself. In his first three weeks at Software Magic, he did his best to get started on the right foot. All signs were positive. He received a warm welcome from his boss Jan Thomas. She had recruited Ben from another IT consulting shop across town to run Software Magic's marketing area. Colleagues were polite, yet a little preoccupied. Without a marketing leader for four months, his department seemed delighted to have a sponsor again – a guide and an advocate for their work.

Ben jumped right into the new job. He immediately began work on the upcoming annual meeting for the firm's top level of staff, its consulting principals. Granted, this isn't the most strategic work in the world, but key leaders from NovaStart, Software Magic's publicly traded parent company, are planning to attend. "The meeting has to rock," Jan had said to Ben. So he's been rolling – until today's little political speed-bump.

The Ambush

Ben now recalls this morning's incident. In the middle of an excruciating run-through of the meeting agenda, Jim Hopkins and Paul Morris dropped by his office.

"Hey Ben, when you have a minute, can you come down to my office?" Jim whispered.

After excusing himself from the conference call, Ben hustled down the hall to Jim's office. It is located next to Jan's office, visually demonstrating Jim's power as the head of the largest office in the firm. Paul, leader of the largest practice group, was sitting in one of the guest chairs while Jim finished an email.

"What's up, guys?" Ben said with a smile. He suddenly realized he was looking at two of the most powerful people in the firm's matrix.

Jim is a straight shooter who grew up in Philadelphia. "Ben, we know you're new and that you've been thrown into the whole principals' meeting thing from your first day."

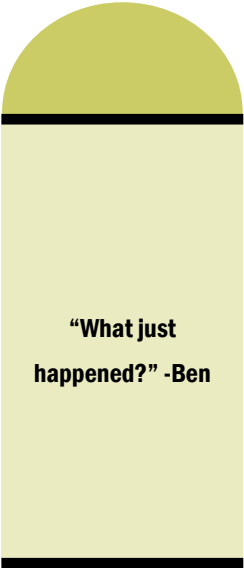
Ben sensed a "but" coming. Jim obliged.

"But . . . we have to tell you that we're getting a little concerned about how you are handling the meeting"

"OK..." Ben said, sensing an ambush coming.

After an awkward pause, Paul piped up. "Here's the deal, Ben. We've been through this before. Kevin, the previous marketing head, was all focused on making a big splash when he first came in. He stomped around telling us what we should do to 'promote the brand' without ever talking to us. We spent a God-awful amount of money changing marketing collateral, re-doing the web site, and printing new business cards. It was a total waste, just one big marketing silo."

Ben tried hard to not become defensive. After counting to ten, he asked, "OK, I've



"What just
happened?" - Ben

heard about Kevin's mistakes. But I'm not doing anything with branding yet. I'm just trying to clean up the principals' meeting. How does the meeting relate to Kevin's branding project?"

"It's not what you're doing; it's how you're doing it," Jim answered. He smoothed his tie and continued. "Listen, just because you're running marketing doesn't mean you can jam things down our throats."

"Hold on," Ben said, trying to stay calm. "I've been here for a month. How can I jam anything down your throat? I've barely found my way to the bathroom!"

"What do you call getting Jan all fired up about changing the entire agenda for the principals' meeting at the last minute?" Jim retorted. "One plane-ride with you and Jan from New York to Chicago and we're suddenly doing a 180° change! I think your changes are sending the wrong message and are going to focus us on the wrong things."

A tense pause followed. Clearly uncomfortable, Paul tried to defuse the situation. "Listen, Ben. We know it's tough to enter an executive team from the outside. But you need to step carefully. Remember, every idea you throw out was an idea someone else thought was pretty good at the time. Even Kevin has quite a few loyal followers around. You don't want people to think you're arrogant and rude – that will only get in your way later. There's no reason to make enemies so soon."

Paul's intervention took a little steam out of the debate.

Ben needed to buy time. Taking a deep breath, he looked both of his new colleagues in the eyes. "OK, thanks for bringing these things up to me. If I've come across disrespectfully, I am sorry. My goal is to get things done. Let me re-think the meeting and see if I can find a way to pull it off in a way that makes everyone happy."

The 9-1-1 Call to a Mentor

Staring out the window, Ben gets an idea. He picks up his phone and dials the familiar number for Terry Dennis. Terry is a friend and one of Ben's first bosses at his former consulting firm. Terry was legendary in that company, a high performer who also happens to have a bias for new kids on the block and underdogs. He put Ben under his wing and taught him the ropes of the industry. But more than his technical knowledge, Ben always values Terry's astute understanding of people and organizations. Though they don't talk often, Ben knows the door to Terry's insight is always open.

In this situation, Ben knows he needs Terry's input – and quickly. He asks Terry to join him for lunch, guessing that an hour with Terry might shed some light on the situation. Not surprisingly, Terry agrees to catch up with his former protégé.

After choosing a table outside a bustling sidewalk café, Ben and Terry order lunch. When the conversation turns to Ben's new role, Ben relates the incident where he was side-swiped by Jim and Paul.

"So a day later, what do you make of this situation?" Terry asks.

"Well, I'm confused," Ben replies. "But more than anything, I'm frustrated. I want to do my job. I'm doing the best I can in imperfect circumstances. And, if I'm supposed to make everyone happy at the same time, it's going to be really difficult."

"What makes you think it's your job to make everyone happy?"

"Well, of course I *don't* think it is my job. But the first time I try to do anything, I get slapped by two of the most powerful people in the firm. Let's face it, changing the principals'

"You need to step carefully. Remember, every idea you throw out was an idea someone else thought was pretty good." - Paul

meeting agenda is a pretty *small* thing,” says Ben.

“Let me ask you a question. Before trying to make changes, did you do your homework?” Terry inquires.

Ben responds quickly, “Sure I did. I looked at the existing meeting agenda. I compared it to the strategic planning documents that Jan gave me when I started. I made some adjustments and ran them past Jan on a plane ride from New York to Chicago.”

“OK, I can see you did your homework on the event, the strategy, and your boss. What homework did you do on your *colleagues*?”

“What do you mean?”

“Ben, I’ve taken on many new leadership roles in my career. And over that time, I’ve learned three laws of building influence quickly with my colleagues.”

Ben knows to take notes when Terry goes into “teacher mode.” He takes out a pen and clears his notepad of crumbs.

Terry says, “Trust me, this is common sense. You’re going to be seriously underwhelmed.”

The First Law of Influence: Know your colleagues

“Bring it on,” Ben says.

“OK, if you insist,” Terry responds. “The first law is to know yourself and know your colleagues. But look well beyond surface items such as their resume or job title. Study how they interact. Do they like to be in control? Do they work hard to keep everyone happy? Do they love the limelight? Do they like to research every decision carefully?”

“It sounds like one of those personality-type things? Is that what you mean?” says Ben, scribbling notes on his notepad.

Terry squirms, obviously uncomfortable with that characterization. “Well, there are dozens of different ways to study how people interact. It’s most important to *do* the studying of yourself and your colleagues. This is more important than the particular tool you use.

“But don’t stop with studying their interpersonal styles. You also need to study their agendas. What are they trying to accomplish? Why does it matter to them? What do they think must happen to actually achieve their goals?”

Ben stops writing mid-sentence. “I know I need to do more homework on my peers. But, it’s daunting. I’m not sure how to open up this kind of conversation without automatically raising my colleagues’ defenses. To walk into their offices and ask them for their goals seems so...”

“Fake?” Terry offers.

“Yes... and forced and forward. But I don’t think reading their PowerPoint decks will get the job done,” Ben says.

Terry adds, “Only if you think that the decks contain the whole truth. Listen, here’s a little secret. Many of your peers, no matter how accomplished they are, struggle to articulate what they’re really trying to accomplish. Sure, they put together the corporate slides. But these decks usually capture only a portion of the real message. You need to talk to them to really understand.”

“OK, but I’m still stuck with how to get the straight story from my colleagues. If I were them, I’d throw up a defensive wall as soon as the ‘new guy’ starts asking probing questions,” Ben says.

“Before trying to make changes, did you do your homework?”

-Terry

Terry chuckles. "There you go being unintentionally brilliant again. The key is to do exactly what you just suggested: put yourself in their shoes. Ask yourself what sort of questions they need answered before they will share openly with you." He pauses. "So why *would* your defenses be up if you are an established manager at the firm and I – a newcomer – ask about your goals?"

Ben thinks for a moment. "First, I'd be wondering how you're going to use the information. Second, I'd ask whether or not I can trust you – are you going to share my comments with my boss Jan. And third, I'd wonder why you want to know all of this information right now."

"OK," Terry responds, "that's a good starter list. Let's start with the biggie: why do you want to know about their agendas and why now?"

"Well, that's simple. I want to figure out what everyone else is trying to do so that I can figure out how my work can best support the direction of key leaders in the firm. And now is better than later because I'd rather not run down a bunch of blind alleys in my first six months," Ben answers.

"Good. And how are you going to use the information?" Terry asks.

Ben thinks for a moment. "Honestly, I have no clue right now. But I guess I'll take the interview notes from all of my meetings and start to look for themes and areas of conflict."

"Will you report back to Jan or others?" Terry probes.

"Well, maybe in summary. But I wouldn't quote anyone or put any detail out there without talking to them first."

"Could you just answer those questions the way you just did for me?" Terry asks, smiling.

Ben laughs, "Obviously." He jots a few more notes. "OK, but what questions do I ask *them* that might encourage them to reveal their real goals and interests?"

Uncovering Hidden Agendas

Terry directs, "OK, here's a pattern that might work for you. Why not start by asking them what they're proud of in their area of responsibility? People love to brag, so why not give them permission to do so for a few minutes? Then, you can ask them for a few things they're concerned about. Hopefully, by this point, they are comfortable sharing with you and they will give you clues about how they want things to change. How does this sound so far?"

"Pretty straightforward," Ben replies nodding.

"All right, so we have a picture of their current situation. Now it's time to figure out where they're trying to go. This is pretty simple too: pick a time in the future and have them assume that they've been wildly successful. It's early in your fiscal year, so talking about this fiscal year might make sense. You can simply ask, 'Assuming you are wildly successful, what accomplishments will you achieve by the end of the fiscal year?' Then, after you ask this question, do something very important," Terry coaches.

"What's that?" Ben asks, poised for brilliance.

"Shut up and listen!" Terry laughs. "Listen to the content. But also watch for clues about how the other person relates to you. Are they fast or slow? Deliberative or impulsive? Animated or reserved? Direct or indirect?"

"Oh yeah – the style thing."

"Yes, the style thing. You're always watching for both what people say and how they say it."

Ben pushes back from the table. "Is that it for your First Law?"

"Not quite," Terry says. "You need to know a few more things: First, you want to know what must happen for them to achieve their goals? Second, you want to know of any initiatives they already

"The key is to do exactly what you just suggested: put yourself in their shoes." - Terry

have in place to make progress toward the goals? This will help you figure out where they will spend the majority of their time and energy. Plus, you'll find out what they'll fight against tooth and nail."

"So that I don't get in their way?"

"Not exactly. You may choose to do things that get in their way, but at least you'll know what's coming and you can negotiate about it."

"Instead of getting pulled into an ambush meeting like yesterday."

"Exactly!" Terry pauses. "The third thing you need to know: why do they want to achieve these goals? What's driving them?"

"Oh, that sounds like a loaded political question. How can I get that information without having the walls go up?"

"A simple question starts it. You can ask, 'Assuming you accomplish all of these great things this year, what good things will happen as a result for the company, your team, and you personally?' Then . . . do that important thing again."

"What, shut up and listen?"

"I like you because you're a quick study. Yes, listen – but with your eyes as well as your ears. Look for where the other person has the most energy, for what he says . . . and doesn't say. You may have to fill in a few blanks, but you'll get started."

Terry glances quickly at his watch. Ben notices the gesture, grabs the check and closes his notepad.

"I guess your second and third laws have to wait for another time. But at least I have a place to start."

"Yeah, why don't you begin back with Paul and Jim? After you talk to them and few other colleagues, give me a call and we can do lunch again."

The Next Step

Back at the office, Ben picks up the phone. "Paul, can we schedule half an hour sometime this week? I'm working on the principals meeting, but before I get too far, I'd like to do a little homework with you." He smiles back at his family's photo and thinks to himself, "I can do this."

It's Your Turn

See the attached "Short Course" for a summary of the discovery process Terry outlined in this article. Why not identify a colleague you need to influence more and try this with them? Then share your experiences with others on the our blog at www.noondayventures.com or write to us at real-time-learning@noondayventures.com.

In further episodes of *Minefields, Hidden Agendas, and Allies*, Ben learns first-hand two other Laws of Peer Influence.

Noonday Ventures helps leaders rise above ordinary performance in “bet-your-career” roles. Founded in 2004, we combine deep experience and proven intellectual property to turn everyday work into a master class.

The Short Course

Similar to Ben, incoming leaders create political pitfalls by failing to adequately build relationships with key colleagues. Focusing on business priorities and style preferences are easy places to start when building bridges. The *Business Agenda Discovery* conversation provides an opportunity to learn about both. Here’s how the discovery conversation works:

Select

- Identify the colleagues whose work most directly touches yours or whose support you anticipate needing most.
- Prioritize your conversations.

Prepare

- Think carefully about any *questions* your colleagues may have about meeting with you. Proactively answer the most important questions during your initial contact with them.
- Carefully craft and share an agenda
 - Purpose: *Example - I want to learn more about your perspective and what you are aiming to achieve.*
 - Process: *Example- I plan to ask you a few questions about your group’s current status and direction.*
 - Payoff: *Example - I will be able to make decisions about my group with your unique perspective in mind.*

Conduct the meeting

- Current Situation
 - What is your group doing really well? What are you proud of?
 - What concerns you?
- Desired Situation
 - **Goals:** For this next year to be a success, what does your colleague need to achieve?
 - **Critical Success Factors:** For each goal, what are the things that must go well to succeed?
 - **Current Initiatives:** What initiatives are moving these Critical Success Factors forward?
- Impact
 - What good things will result from the achievement of your goals? For the organization? For you?

Remember to observe not only the *content* of the conversation, but *how* your colleague speaks – notice pace, energy, and eye contact. These are important clues to interpersonal style.