

Fearless Thinkers, Episode 12
"Engaging the C-suite"
with Suzanne Bates

Masami Cookson: Welcome to Fearless Thinkers, the BTS podcast. My name is Masami Cookson and our host is Rick Cheatham, head of marketing at BTS.

On today's show, Rick sits down with Suzanne Bates who is a partner at BTS, leadership expert, and bestselling author. She's an entrepreneur and founder of Bates Communications, which recently joined the BTS family.

Suzanne's organization was built on cultivating clear communication and enabling executives to interact more effectively. Hey Rick, how are things going?

Rick Cheatham: Oh, Masami, things are going great, thanks. Our music fans out there in the audience will know that living in Austin, Texas, it is Austin City Limits Music Festival time, which is always one of those crazy moments, where, you know, there's a hundred thousand extra people wandering around the city. And even more fun for me, 'cause I live so close to the park that the music shakes my walls.

Masami: Dang.

Rick: Anyway, more importantly, for as much as I love live music and the wonderful world I get to live in, I also love getting to sit down with Suzanne. She really, really is a joy to get to connect with. As somebody who's spent so much of her professional life dealing with complex issues with executive teams, she really gets what their priorities tend to be, and how to really connect with the mind of the CEO. And so, it was such a good time that we ended up splitting the conversation into two.

Today, we will go deep into... what's our best advice to engage the senior leaders in your own organization. And then the next episode, for those of you who are sellers out there – what it's like to sell to a CEO. Two great conversations about engaging the C-suite.

Masami: Love it. Let's get into it.

Rick: I am so, so happy you're here today. Welcome to the show.

Suzanne Bates: Thanks, Rick. Great to be with you.

Rick: The whole idea of executive engagement is one of those things that everybody talks about as being really, really important, but really there aren't many people out there giving concrete advice of things that average folks like us can go do to be better.

Suzanne: Yes, it's really challenging to walk into the C-suite or a senior executive's office and feel confident. For all of us it's that way. And we do learn over time how to handle that, but the goal of having this conversation is to accelerate the process of feeling that confidence.

When I first started asking people the question "What is executive presence, and how do you learn how to connect with executives? What is it about some leaders that makes them very good at that?" – I would hear answers like charisma or presentation skills or wisdom, you know, those kinds of things. And those are okay answers, but they're really not sufficient, as you said, to guide us, to help us understand what actions we need to take, what mindsets we need to have to be comfortable and confident when we're talking with senior executives.

Rick: So, if I'm a mid-level manager or a leader in an organization and I've got an opportunity to be in front of some of my most senior leaders, where should I begin in preparing?

Suzanne: So, it can be intimidating to walk into the office of a senior executive because you don't get that many chances to make a first impression. However, what impresses them may not be what you think it is.

So, when an executive sees you walking in the door – as a middle manager, or maybe even a rising high potential leader – that's how they're really evaluating you. They're looking at you as a whole person, as somebody who, you know, may have the character and the substance and the style to move ahead in their career.

So, preparing in that way is very important. How you show up in term of what you're wearing is less important today than it used to be, right? Because we've all become a lot more informal... And at the same time, we always have to be appropriate.

Rick:

That concept of executive presence, how I walk in the room, how I dress... It is a world, especially where I am in Austin, Texas, where executives walk around in T-shirts!

But at the same time, there is something about showing respect for someone when you walk in the room and showing that you actually care about how you're being perceived. And I'm curious both what you think about that, and also just where you think the balance point is in today's world.

Suzanne:

Well, today things have changed and certainly in terms of how formal we are. And that depends also on where you live in the world and where you live in North America and what industry you're in. So, what I always say is, it's important in terms of dress to be appropriate for the moment, and as you say, to show respect, so that you're conveying in a first impression that that person means something to you.

So how you show up is important, and how you prepare for the conversation is equally important, because you have to be agile in a conversation with a leader. You've gotta show both curiosity and practical wisdom. You have to show both confidence and humility. The balance of those types of qualities are really what they're looking for.

Rick:

Such, such great insight. And I think there's a word that I would wrap, you know, both the conversation around dress and even what you were saying there at the end - that I'd wrap all of that in - and that's the word authenticity. I think if I am dressed in my best, but also authentically me, I'll be much more comfortable. If I show up prepared enough for a meeting that I can have an agile flowing conversation, then I'll be able to be more authentic. And I think so many times, great leaders, C-level executives are where they are in large part because they can smell a fake.

Suzanne:

No question about it. And authenticity is the first and perhaps the most important quality that we

measure in the Executive Presence Assessment. It's one of the five qualities that builds trust. So, when people believe you're being authentic, they trust you.

Executive Presence has – I mean, we measure it in 15 qualities – and we all have strengths, and we all have gaps. And the idea is to enhance those areas like authenticity if we need to work on them, that will help us build trust. And sometimes, it's to dial down some of the behaviors that take away from our authenticity.

Even more important authenticity, though, is your ability to share stories and insights about things you've learned yourself along the way as a leader. The ability to be honest and candid. And back to our topic, which is meeting with a senior leader. That's what they're looking for. They want to hear your real opinion, based in, of course, research or fact. Senior leaders are often pretty insulated. So they appreciate it when people are candid with them.

Rick:

You know, it's, it's funny because that was frankly the big break in my career. I'd been in field sales for a while, and was doing very well there, and they wanted my perspective up at corporate, and I took kind of a commercial role that was kind of a bridge between marketing and sales. So I ended up spending a lot of time with our senior executive, the GM of the division. It's one of those things of being very good at a bad thing – I was great at PowerPoint, and so I was this PowerPoint jockey. But when we were building slides, I would very respectfully tell him, "You know Dan, I see what you're trying to do here" "and these are the things that really scare me about it. You know, these are some potential impacts to clients that might not be obvious." And again, always respectful, always in private... But fact-based insight shifted his perspective of me to where then I wasn't just as PowerPoint jockey – he would actually invite me into meetings. When that's happening and your 25, 26 years old, it's life changing. If it's not gonna end well, you're probably in the wrong company. It's probably not a great leader.

Suzanne:

That's a powerful story. And many people don't have the courage to go there. And they may blame the culture, right? They may say, "Well, you know, that kind of honesty isn't welcomed here." What you did,

the choices that you made – to do it in private, to share knowledge to share fact-based observations – was what paved the way for you to build what felt probably to you more like a peer-to-peer relationship. Now, you certainly were not the CEO, but he was turning to you for peer-style advice. And that's one of the tenants, really, of what we're talking about here.

Because very few people take the moment, right? Seize the moment to do those things. And you did. So, what a beautiful story.

And you know, sometimes as you say, it can feel like it's backfired. It can feel uncomfortable in the moment because not everyone receives negative news, even CEOs, in a positive way. Right?

Rick: Sure.

Suzanne: You know, I can remember working with a CEO who was transitioning into an executive chairman role. We were working with him and the future CEO. And one morning I walked into his office. He closed the door and turned to me and said, "Is there a conspiracy here to get me out of the CEO job?"

Well, I was pretty shocked, because I thought the work that we were doing was helping him. But what I realized in that moment is that the CEO and the senior leader is direct, and they want you to be direct back with them.

So, rather than being defensive, I think what I had to do is review what our goals were together and what had happened, and ask him some questions to help me understand why he was feeling the way he was feeling. Seeking to understand them just as you want to be understood is also an important part of building that peer-to-peer relationship.

Rick: So smart, and actually such great advice and I would argue for any relationship: not necessarily assuming based on previous experience, you know, how this person's gonna behave or you know how they're gonna think, but instead ask great questions and get them pulled into that peer-level conversation.

Suzanne: Yeah. You know, when you're offering advice, especially to a senior leader – or, to a buyer,

which we'll talk about later – it can be tempting to jump to solutions too soon. And one of the, I think, the art of this, really, is knowing when to ask questions and when to offer your thoughts.

I'm sure those listening today have had this experience where they felt maybe they moved too quickly to offering advice before they really understood the situation, so I've made it a practice – and I don't always do it perfectly – but I've made it a practice after I'm asked for advice to think about what it is I don't know yet. And sometimes to ask one more question, or two more questions, that create clarity to get everybody on page about what problem is you're trying to solve.

Rick: Totally. Again, completely agree. It's one of, one of the techniques that I've used and really challenged my team to use, is... Whenever you're meeting with the senior executive, from the very beginning say, "You know, in our time today, these are the two places where I'd really like your advice, and these are the three decisions I hope we can make."

Suzanne: Yeah, well it reassures the executive too.

Rick: Exactly. Everybody's winning.

Suzanne: Exactly, that way we can get realigned at the beginning instead of halfway through the meeting! You know? I mean, that's just a really brilliant and simple concept.

Some years ago, I was working with some senior leaders in a program where they were, the culmination of the project was to present their recommendations to the CEO and members of the senior team. And all of them had worked for a year on these strategy recommendations. Within three minutes, the first team was interrupted by the CEO who was asking them questions like, "What is the problem we're solving?"

And I walked away from that experience pretty profoundly shifting my own thinking about what it was that we needed to do to help those senior leaders. As a result of that, we actually developed a formula for making your business case. The first is you have to establish that there is a problem,

and how you know there's a problem, and it has to be at enterprise level. Then you can, you know, talk about a solution, or call a big idea. And that big idea needs to be stated very succinctly, in 25 words or fewer. And then, ask, as you said, "This is what we would like to learn from you," or, "Decide today." If you always walk in the room with that intention, and you can get that done in three minutes, you're in a meeting with a senior leader.

Rick:

Such, such great advice. I wanna make sure we return back to that enterprise mindset piece, 'cause again, back to my own life and my great mentor Dan – one time I brought to him something that I was very, very proud of and I just was showing him under the guise of asking his advice, and it was completely one-sided, very detailed product launch stuff. And he said, "Rick, this is all your job. Why do you need me?" And you know, that's learning the wrong way – how NOT to show up with an enterprise mindset.

Suzanne:

Yeah, yeah. Well you know, it's so tempting for all of us because, you know, we long for some recognition. Right? And it's easy to fall into that trap, I guess. And he did you a favor, didn't he? I mean by, you know, just pointing out that, you know, "This is what I pay you to do."

Rick:

Right.

Suzanne:

At the same time, you know, maybe if you find yourself tempted to take a project in and show it to your boss, the way to move into enterprise thinking is to walk in with some questions, and those questions might be: What would be the impediments to this? How would the these other teams see it? Or, perhaps even anticipate those issues by going ahead of, you know, ahead of time. But you do have, I think... The point of your story is beautiful, because you do have to have a purpose for that meeting, and it has to be clearly stated.

Rick:

Yeah, purpose is incredibly important, and I think that whole concept of looking at the executive committee... "Who or her or his peers and what are gonna be the things that are impacting them associated with this decision?" That's the easiest way many times, to get that enterprise mindset.

Suzanne:

Yes, just think like your audience, that's what's important. I mean know what the CFO might say about a plan, right? You should know what the head of sales or the head of marketing or the head of product or the head of commercial, you know, whoever those senior people are... When we come with an ask to a senior team, we're not the only people asking. And their jobs are to align the budget and the time and resources with the priorities of the organization. So, from our standpoint, what we're doing always feels like a priority, but their jobs are to understand what all the priorities are.

Rick:

So then, let's just kind of rewind, 'cause I think we went lots of important places. So, all the way back to the beginning, if I'm getting it right here.

First of all, we want to be very respectful and authentic in our approach, even down to how we prepare, how we dress, and as you put it, "the whole you" that you're bringing into this meeting.

The second thing, as part of that preparation I have to have gone deep enough into my topic, and have a strong purpose, that I can have a very agile conversation. Ideally, I've confined the purpose and the topic into a couple of clear places where I'm either asking for advice for certain actions, so we have a clean and clear purpose from the beginning.

And, I'm approaching the whole thing with enterprise mindset that again, enables me to show up with as a peer.

How'd I do?

Suzanne:

Fantastic.

And there's a theme that runs through that, which is preparation. If we come prepared, we will do better. And you know, sometimes it's hard to take the time to do that, but I had a mentor who said to me once, **"Practice is the work; performance is the relaxation."**

Rick:

Oh wow.

Suzanne:

She was giving me that advice for public speaking, But I think it applies to just about every meeting and encounter that you have that's important to you. If you've practiced and prepared, that's the work

and the fun is when you get in the room.

Rick:

Absolutely. I love that - that's going to end up on my little motivational camera roll thing.

Well, great. Thanks so much for that. In just a moment, we'll jump straight into selling to the C-Suite.

Masami:

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