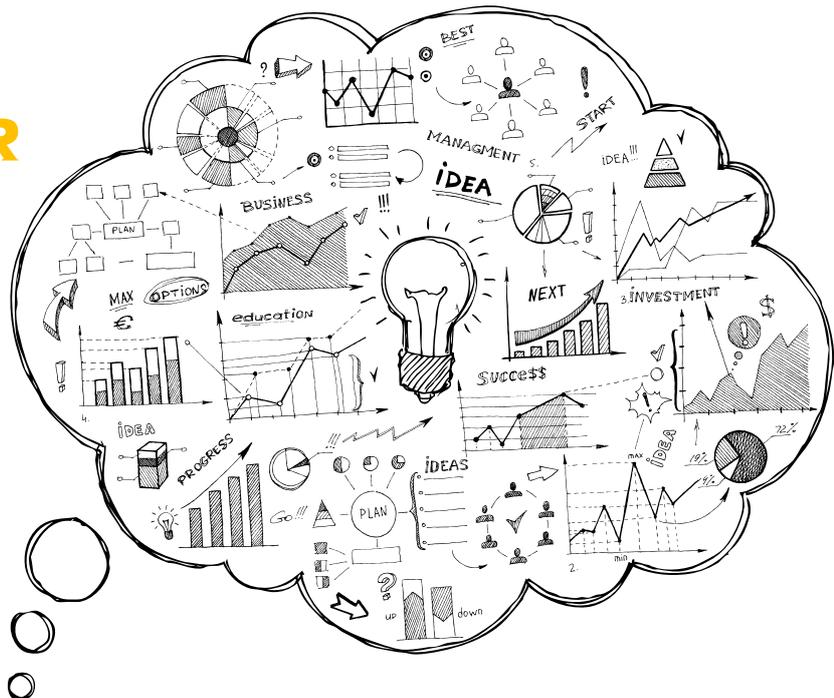




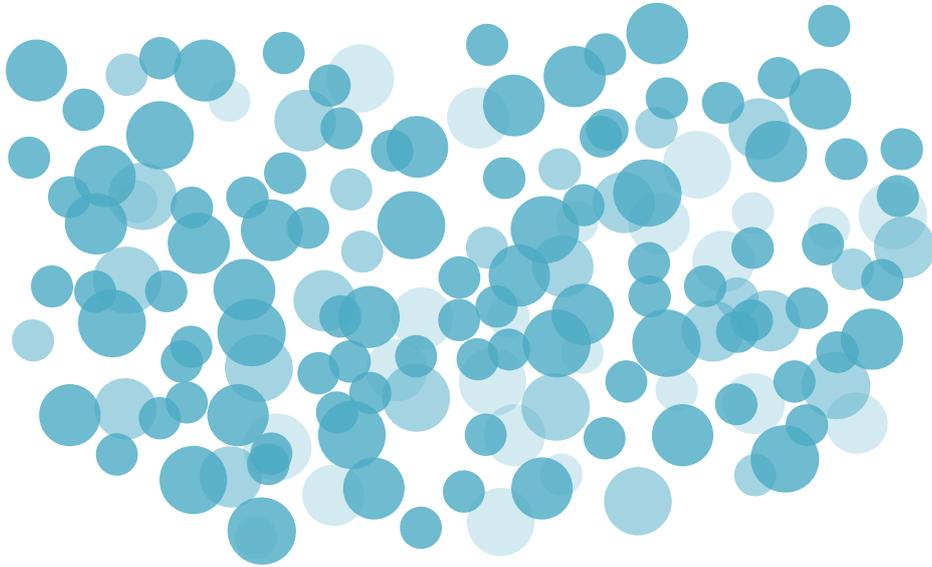
**BEING INSIGHTFUL HAS NEVER BEEN EASY ...**



**NEITHER HAS BEING CLEAR**

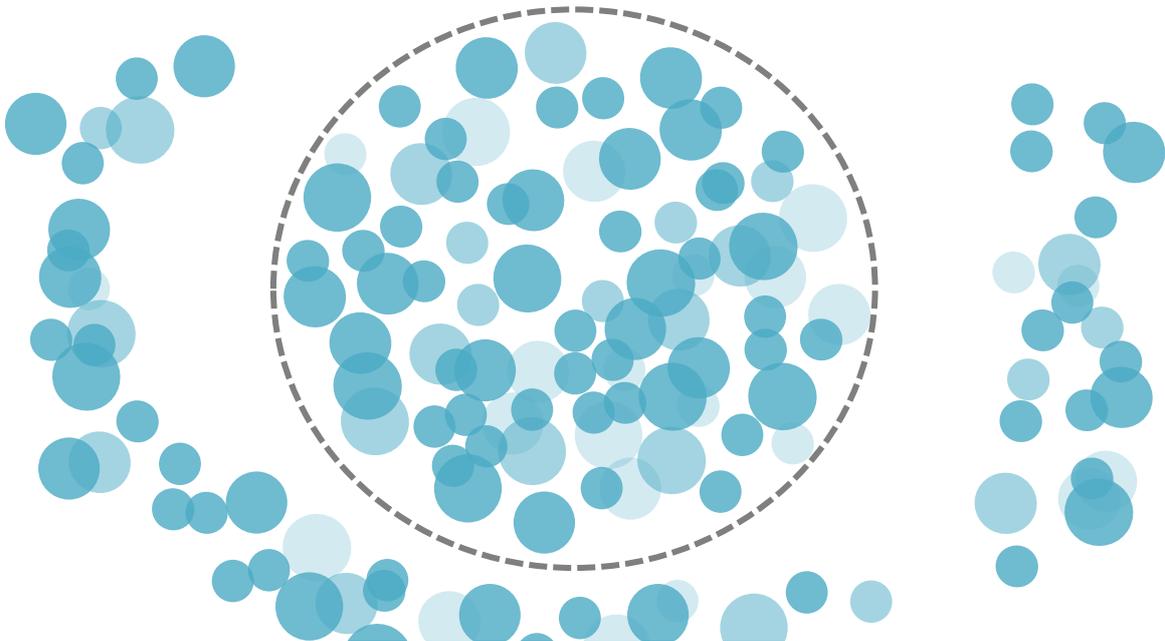


**WE MUST TAKE LOTS OF COMPLEX IDEAS**



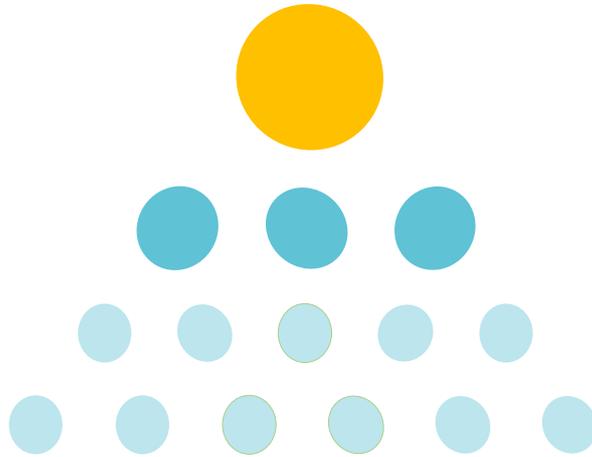
5

**ASK THE RIGHT QUESTIONS**



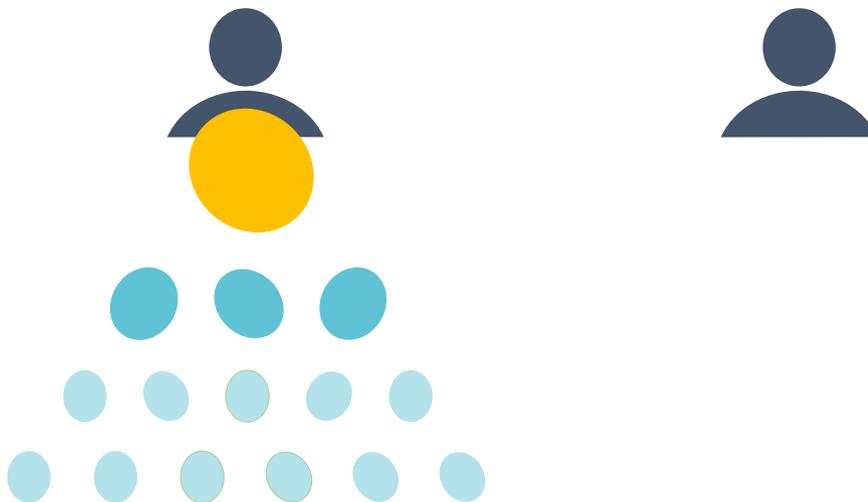
6

SO WE CAN DISTIL OUR IDEAS INTO A  
**POWERFUL AND INSIGHTFUL** STORYLINE



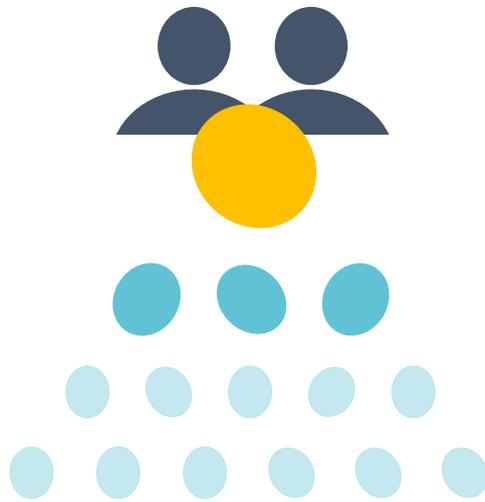
7

AND **SHARE IT** WITH OTHERS



8

**TO ACHIEVE SHARED UNDERSTANDING AND ACTION**



9



## THE BIG SQUEEZE

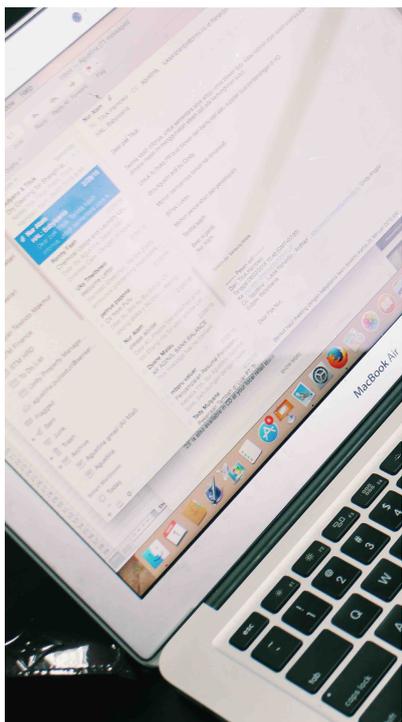
- > **Introduce The Big Squeeze**
- > Review the 'before'
- > Introduce the 'after'
- > Offer 3 takeaways
- > Invite you to go deeper



## THE BIG SQUEEZE OFFERED THE RIGHT BALANCE



- > Frequency of occurrence
- > Seniority of audience
- > Complexity of situation



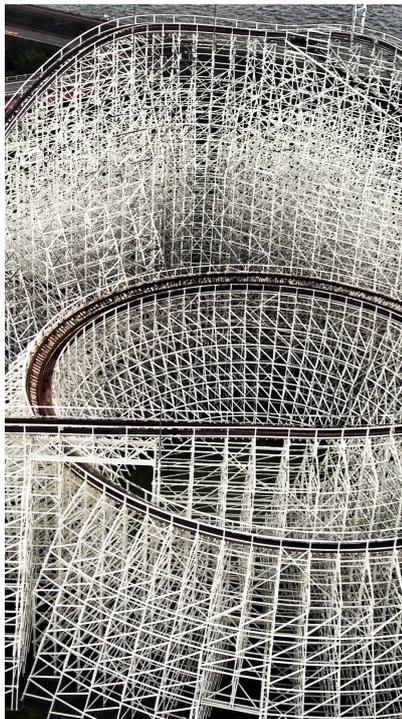
## **FREQUENCY OF OCCURRENCE**

- > Project funding
- > Substantial pressure
- > Triage situation
- > Email



## **SENIORITY OF AUDIENCE**

- > Audience - 3 levels below CEO
- > Author – 5 levels below CEO

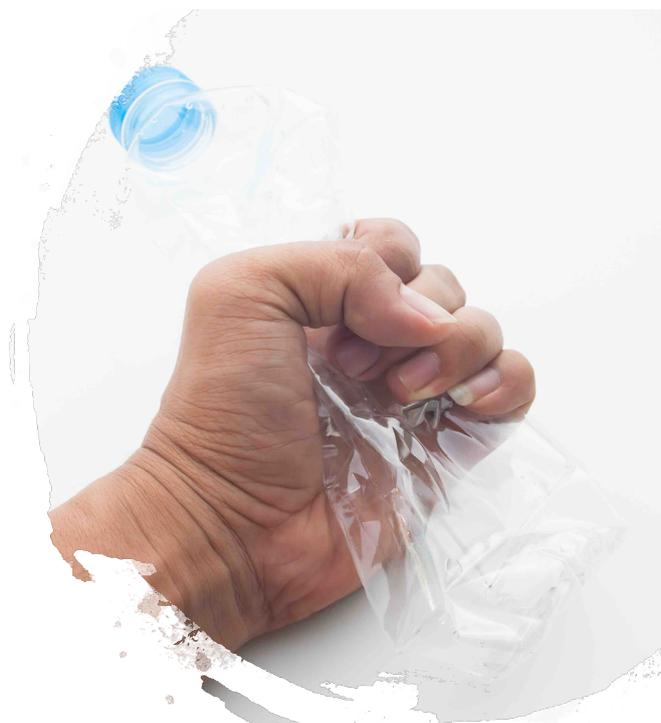


## COMPLEXITY OF SITUATION

- > Quarterly Investment Review
- > 2 / 3 no shows
- > Disagreement with the most influential member
- > Extreme time pressure for himself and the missing 2

## THE BIG SQUEEZE

- > Introduce The Big Squeeze
- > **Review the 'before'**
- > Introduce the 'after'
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Request for increased funding for Group C (total \$10m) for their BAU (\$4.7) expenses from ExCo and Investment Slate (\$5.3m) from investment committee.

- Investment Slate has two incremental costs:
  - ASIC and CCM requiring \$360k in FY20
  - Project Boston (Independent review of this company in response to a BIG BANKS financial crime allegations) requiring \$1.3m in FY20
    - Estimated ~\$4m required over FY21 and FY22.

3. Investment assurance scorecard: IMDO requires each portfolio to self-assess their governance processes and submit by 17-Feb.

- Discussed each Investment Delivery Principle and ranked it.
- Draft copy of the assurance scorecard will be submitted for your review by 31-Jan.

Regards



# AUDIENCE DOES THE HEAVY LIFTING

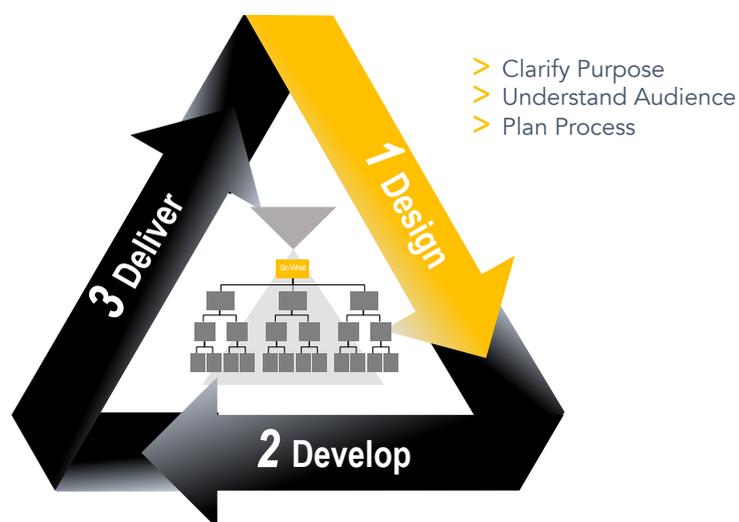
- > Hunt for the message
- > Dodge 'bright bolds'
- > Do their own math

## THE BIG SQUEEZE

- > Introduce The Big Squeeze
- > Review the 'before'
- > **Introduce the 'after'**
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## INTRODUCE THE 'AFTER'



## STRATEGY RELIES ON PURPOSE BEING RIGHT AND CLEAR

... relates to the identification of  
long-term or overall aims  
and interests and the means of  
achieving them

Source: Oxford dictionary

## PURPOSE UNEARTHED THE BIG ISSUE

### Version 1

Purpose – get approval  
for the submission

### Version 2

Purpose – gaining  
agreement about  
proposed approach for  
handling budget shortfall

## UNDERSTANDING AUDIENCE IS KEY

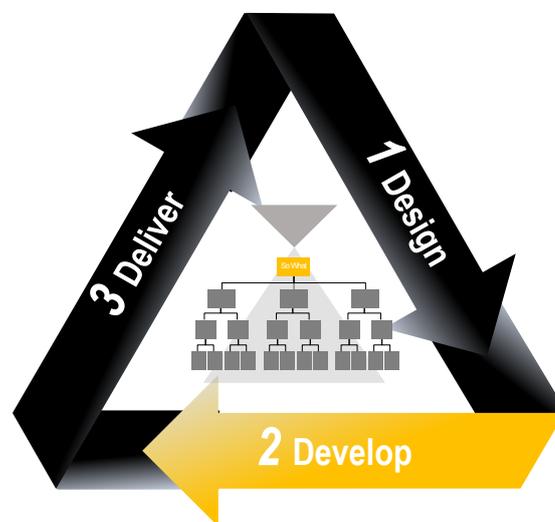
### V1 – Audience

- > Fred – senior, respected
- > Jane – new, methodical, responsible
- > Mary – Rohan's boss, young, influential

### V2 – Audience

- > Fred – senior, respected, **strong opinion**
- > Jane – new, methodical, responsible, **hugely distracted, vulnerable**
- > Mary – Rohan's boss, young, influential, **hugely distracted, ambitious**

## INTRODUCE THE 'AFTER'



Word File Edit View Insert Format Tools Table Window Help

2020 0311 - QIR v2

Home Insert Draw Design Layout References Mailings Review View

## CONTEXT

The QIR submission needs to be finalised.

Yesterday I met with Fred to finalise the QIR submission before the COB 24 January deadline.

## TRIGGER

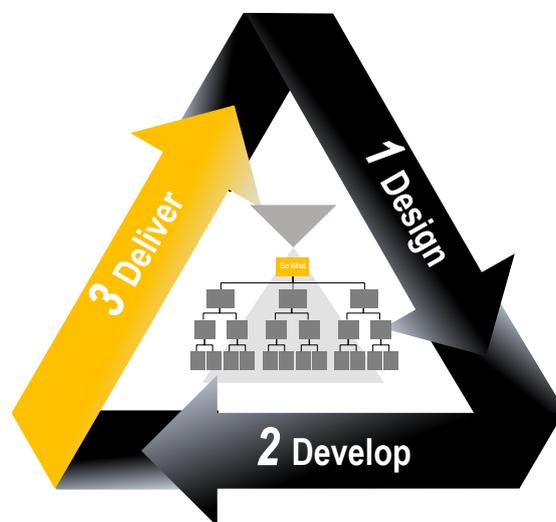
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## AUDIENCE QUESTION

Is there anything to call out?  
Are we managing to the allocation and are we going to meet our stretch target?

Page: 3 of 8 1920 words English (United States)

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# WHAT DIFFERENCE DO YOU SEE?

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**569** net \$100k

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their BAU (\$4.7 investment committee. company in response to giving \$4.9m in FY20 and FY22 to self-assess their your review by 31-

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# EVALUATED USING THE TEN POINT TEST

## Is the introduction right?

1. Is the context right - does the storyline start in the right place in time?
2. Does the trigger describe why you are communicating with this audience now?
3. Is the question really the single question we want to answer?

## Is there one clear, powerful So What (Answer)?

4. Is there one So What that is 25 words or less?
5. Is it powerful – does it include the 'kicker' and synthesise (not just summarise)?

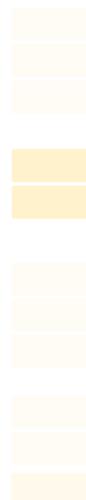
## Is the supporting storyline robust?

6. Is the key support for the so what logically sound - a grouping or deductive?
7. Are the second and third level supports logically sound - grouping or deductive?
8. Is the storyline MECE (categorised well and enough evidence) at every level?

## Does it meet the audience needs?

9. Does it meet the audience needs and concerns?
10. Does it suit their "style" – type and level of support?

Total / 10



# ANCHORED AROUND 1 MESSAGE

✓ 23 words  
✓ Powerful

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# EXEC SUMMARY IS UNCLUTTERED

Hi Ali,

Based on the feedback from various project managers and meeting with Rob yesterday, please find attached Draft JAN QIR submission for your review. Apologies on the tight time-lines, as the finalised submission is due by COB Friday 24<sup>th</sup> Jan therefore would appreciate if you can get back to me with your feedback by COB Thursday 23<sup>rd</sup> Jan.

In yesterday's meeting I had discussed 3 points with Rob.

**In brief:**

1. Review of projects (forecast vs actual) within investment slate: There were no concerns on forecast numbers vs actual.
2. JAN QIR submission (Attached Draft) to include the following:
  - Progress made towards meeting \$3m stretch target. \$1.3m is met through projects leaving a shortage of \$1.7m.
  - A request for approval of \$5.3m increase in investment slate funding for Group C and ExCo approval of increase in BAU budget by \$4.3m.
    - **NOTE:** Proposed FY20 Allocation = \$44.5m, calculated as
      - Current FY20 Allocation \$42.1m
      - PLUS \$5.3m (new funding) = \$47.4m
3. Discussed Investment assurance scorecard: IMDO requires each portfolio to self-assess their governance processes and submit by 17-Feb.

**Detail notes:**

1. Review of projects (forecast vs actual) within investment slate: There were no concerns on forecast numbers vs actual.
  - Q1 was underspent by \$1.2m (Approved funding \$7.4 vs Actual (As at Jan) \$6.2m), which was due to a combination of project savings for stretch targets and forecast adjustments.
  - Q2 forecast (\$10.2m) vs the actual spend would most likely be reduced by \$200k (savings due to delays in resourcing on-boarding).
  - Q3 (\$12.7m) and Q4 (\$11.1m) are reasonable increase compared to Q1 and Q2 as the projects ramp up and the expenses match the burn rate.
2. JAN QIR is an extra-ordinary meeting to approve Q3 funding that wasn't approved in Dec QIR. This submission includes the following:
  - Progress on \$3m stretch target:
    - \$1.3m is met through projects leaving a shortage of \$1.7m.
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- However, my conversations with project managers indicate that this year projects kicked off more quickly than usual which would reduce the likelihood of this being realised
- As a result, we agreed to reassess in case some or all of the shortfall needs to pass to BAU

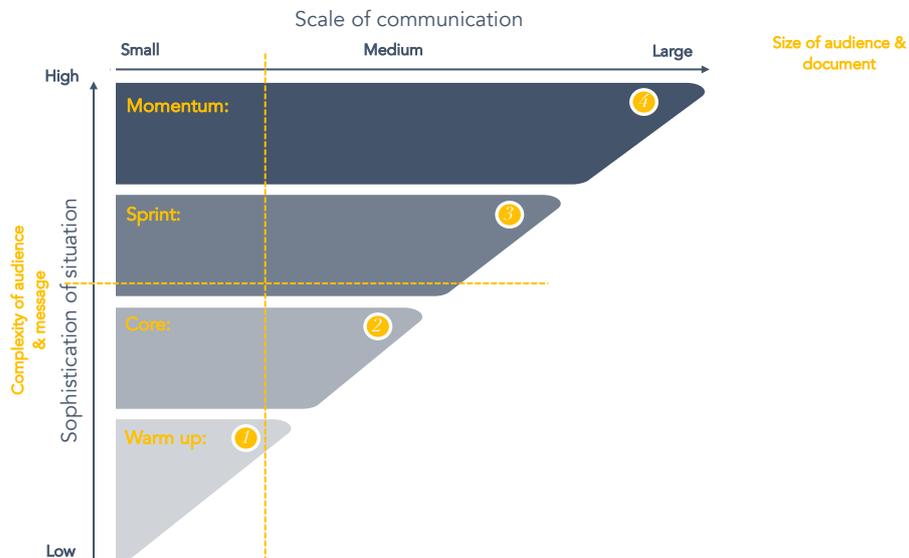
**We need an extra \$5.3m to cover the new regulatory initiative**

- Group C has requested a total of \$10 m in extra funding for 2020
  - \$4.7 for BAU from ExCo
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    - ASIC and CCM requiring \$360K in FY20
    - Project Boston (independent review of this company in response to a BIG BANKS financial crime allegations) requiring \$4.9 m in FY2020
- Group C has also requested an extra ~\$4m in FY21 and FY22 (is this the total across both years, or is this ~\$4m for each year?)

I realise you are under the pump at the moment but would very much appreciate your feedback before the 23<sup>rd</sup> so we can be confident we are in alignment when submitting the review.

Kind regards,  
Rohan

## HOW DO YOU RATE TODAY'S EMAIL?



## THE BIG SQUEEZE STORYLINE



Yesterday I met with Fred to finalise the QIR submission before the COB 24 January deadline.

Apologies for the tight timelines, but I need your feedback before we submit.

What are the callouts that you need feedback on?

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## THE BIG SQUEEZE

- > Introduce The Big Squeeze
- > Review the 'before'
- > Introduce the 'after'
- > Offer 3 takeaways
- > Invite you to go deeper



## TO BE STRATEGIC WE NEED TO ...



*Deliver the right message* by being super clear about our purpose

*to the right people* by understanding who they are

*in the right way* by focusing on your storyline first

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- > Introduce The Big Squeeze
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- > **Invite you to go deeper**



## DEEPEN YOUR SKILLS



Learn to cut through



Collaborate with motivated peers



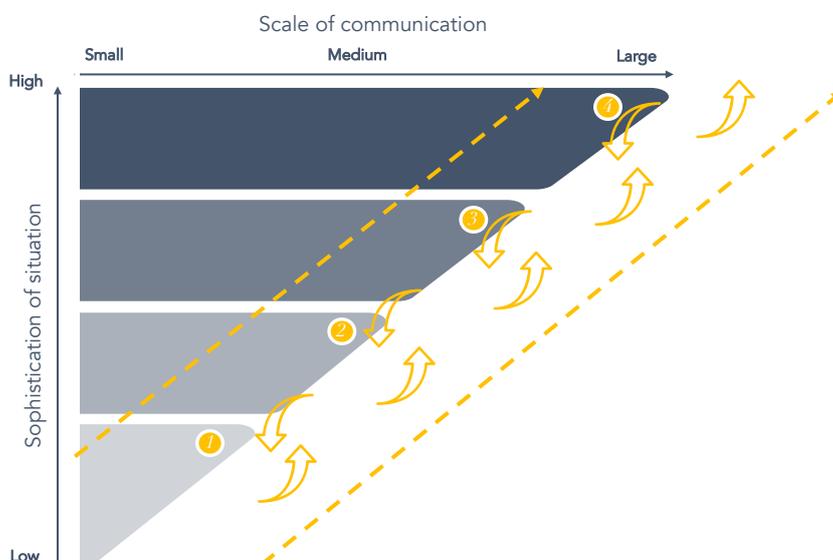
Unlock our growing resource collections



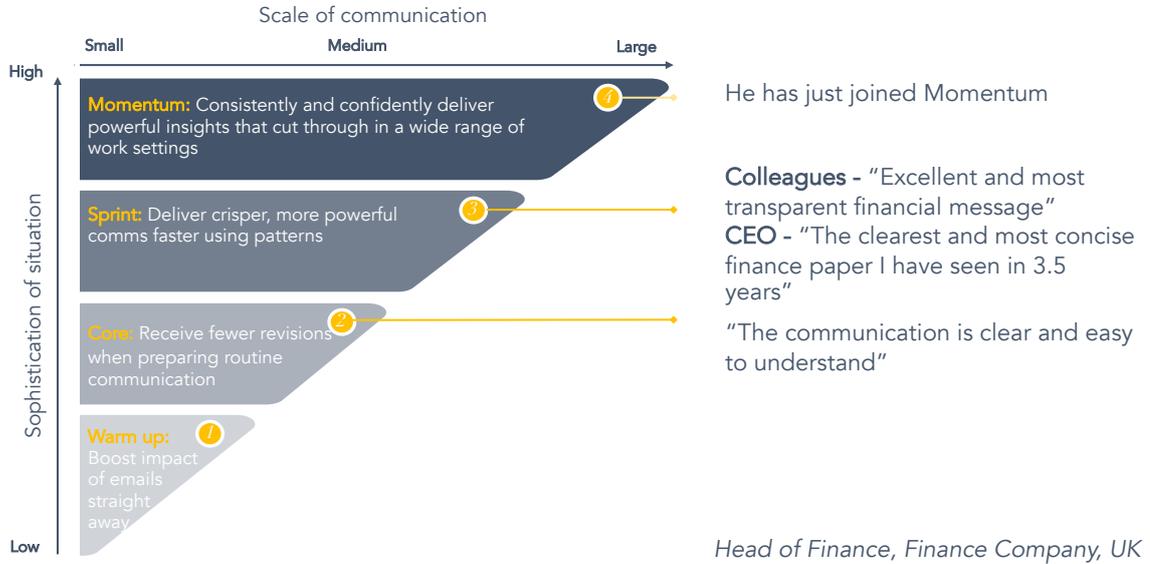
Join quickly for welcome gifts

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## ITERATIVE LEARNING TO COMPOUND GROWTH

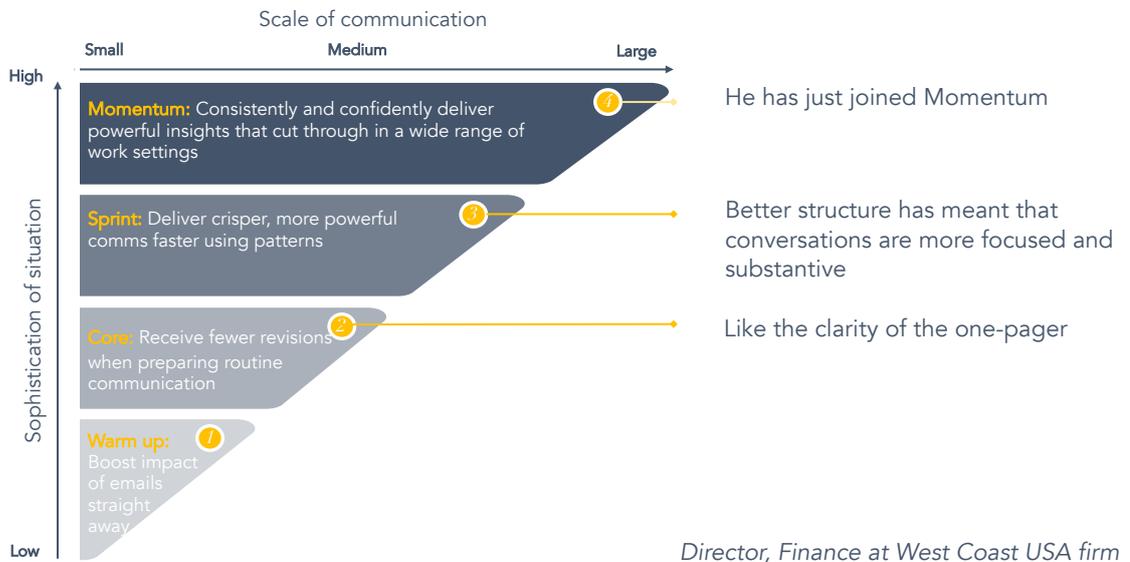


## PARTICIPANT'S JOURNEY



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**COLLABORATE WITH  
MOTIVATED PEERS**

## CERISE ATTRIBUTES HER SUCCESS TO CLARITY FIRST

Hi Davina

It's s funny to listen to myself :)

Perfectly happy for you to use however you would like.

FYI - I also got an award for my great work today. Nothing big but still, the recognition was nice. I feel like much of it was thanks to the work I've done with you!

Thanks for creating such a great program.

See you next week!

Cerise

[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)

**Raj S**

The story of a People powered digital transformation at St.....

To: Davina Stanley, Cc: Raj

 Siri found new contact info Raj

Many thanks Davina

You make it come alive

Yesterday the session was like I was the F1 driver, had the support crew Strategized and orchestrated by a master tactician (You) to achieve a podium finish!

It was the ride of my lifetime

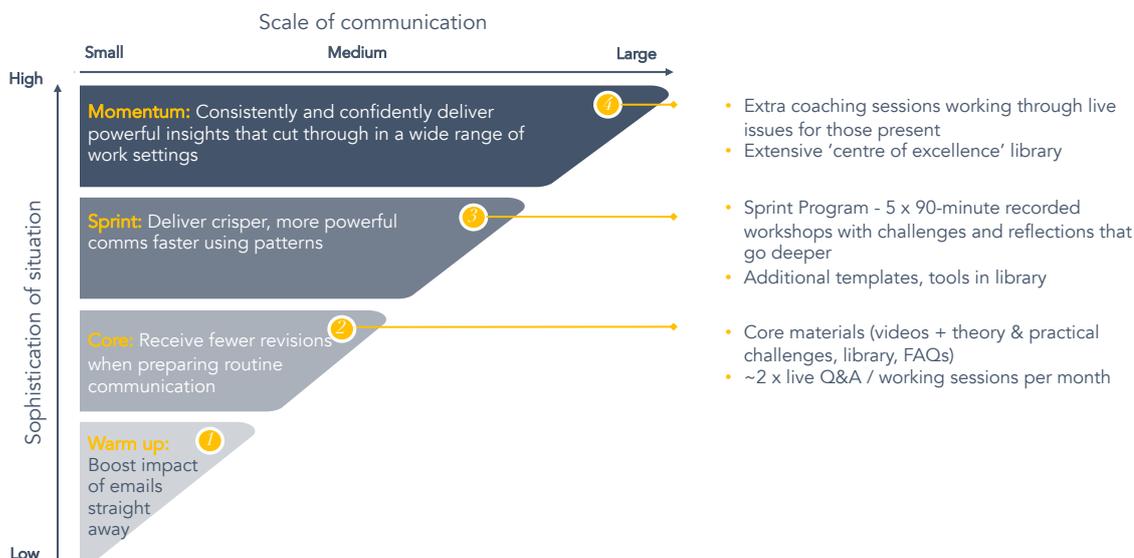
- Acceleration, deceleration at the right time
- At the pit, tire changes in record time (2 sec!)
- Breakneck speed yet following the methodology with laser focus

Cannot thank you more

My utmost regards  
Raj

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## COLLABORATE DURING YOUR JOURNEY



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## UNLOCK OUR GROWING RESOURCE COLLECTIONS



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## DEEPEN YOUR SKILLS

-  Learn to cut through
-  Collaborate with motivated peers
-  Unlock our growing resource collections
-  Join before 16 October for welcome gifts

[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)

## PARTICIPANTS LOOK FOR SPEED

- Able to respond to emails **quickly**
- Develop my own **set of templates** for translating the same message to different stakeholder groups (exec paper, project sponsor, project team, business stakeholders, end users)
- Improve ability to influence a new team to develop team norms for communicating e.g. task focused teams who only use long email chains to communicate but can't **see how much time that's wasting** or understand why they don't get the outcomes they need.
- 1 month - I have successfully launched the new change management framework for our team of 400 people with clear messaging about it's purpose, the benefits and how to use it.
- 3 months - I have successfully helped our CIO (my one up manager) gain full budget approval for FY21 by preparing the pitch to his leaders.
- 12 months - Our senior leadership team view me as a peer and always seek my advice when communicating with their leaders or on important matters. Communication is not an area for improvement in our team's engagement survey.
- **Improve speed**
- Find **smarter ways of tailoring the same set of messages to different audiences**
- Learn how to communicate clearly within business templates provided
- I'd like to be able to prepare comms for our senior leadership team that they actually find useful, rather than creating documents that no one reads. For example:
  - 1.1) weekly updates on what our wider team is doing so they are always current, not caught off guard!; and,
  - 1.2) packs that allow them to **make decisions based on the information in it, rather than having to ask clarifying questions.**
  - 2) I'd like to be more clear, succinct and persuasive when presenting to my peers and our leadership team.
  - 3) I'd like to be **more efficient** when I write and edit comms, stop ruminating about what to say where and constantly rewriting,
    - > Being more structure driven when I write content (slide/email)
    - > Gaining more weight when I present/speak/communication (to be taken more seriously)
    - > Getting to **finish my drafts faster**

## RECENT POST-PROGRAM RESEARCH\* HIGHLIGHTS THE PRODUCTIVITY SHIFT OUR APPROACH DELIVERS ...

### First drafts were **faster to prepare**

- Nobody now takes more than 10 hours to complete their first draft
- 22% more participants now take less than 1 hour to complete their first draft

### Reviewers **asked fewer questions** about the first draft

- 12.5% of drafts now lead to no review questions at all
- 20% fewer drafts now always lead to stakeholder questions

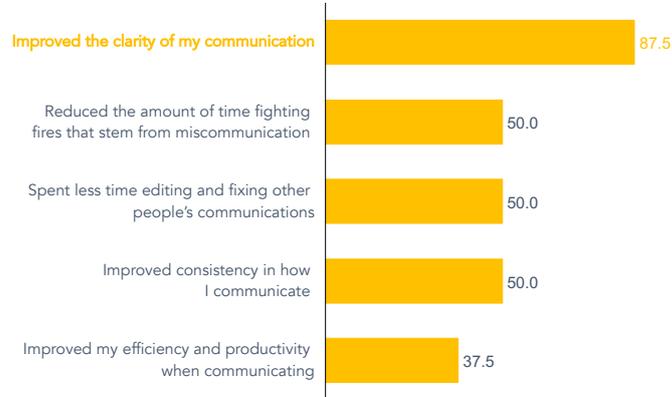
### Reviewers made fewer changes at the final edit stage



\* Source: post program survey for a recent client program

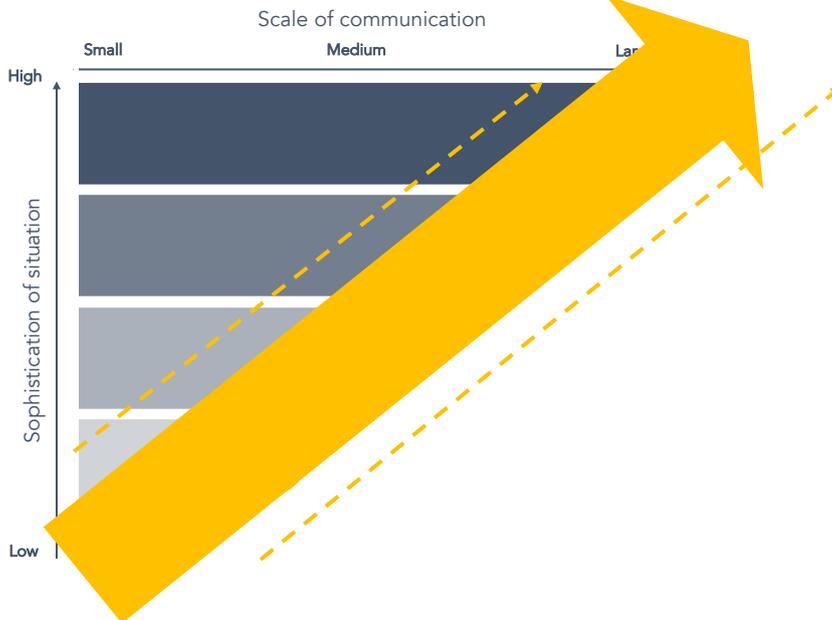
## ... ALONG WITH **GREATER SATISFACTION & IMPACT**

All participants identified improvements with the majority having improved the clarity of their communication  
% of participants (all chose multiple options)

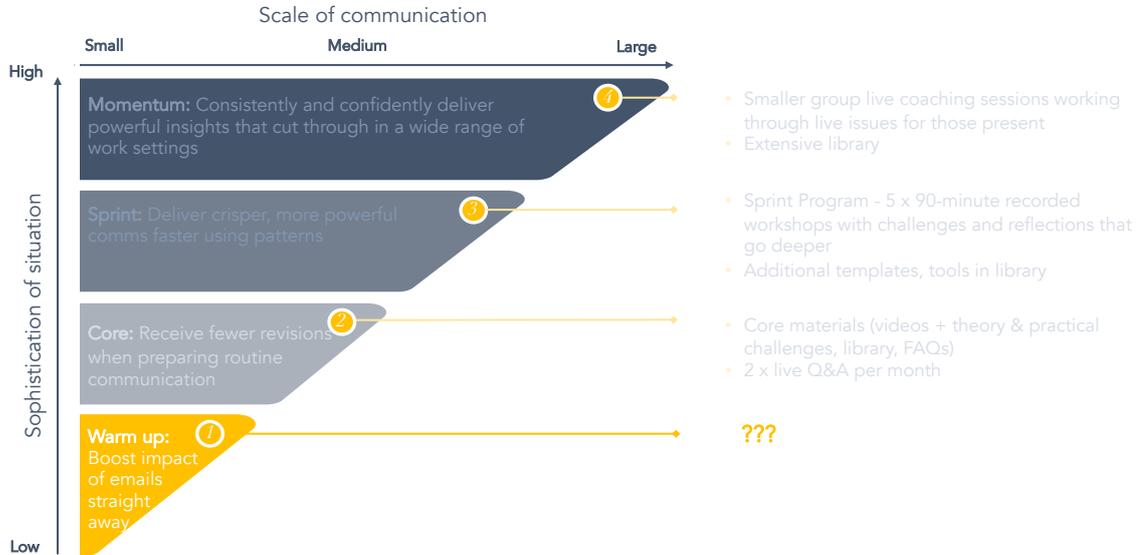


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## HENCE ... **ACCELERATOR BONUS**



## LET'S ACCELERATE YOUR JOURNEY



[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)

## >> LET'S ACCELERATE YOUR JOURNEY



### 01 Access materials today

- > Doors close 16 October
- > Start growing immediately



### 02 Attend Accelerator Workshop

- > 2 x times on 22 October
- > Learn the basics
- > Complete challenges
- > Get going immediately



### 03 Attend Consolidator Workshop

- > 2 x times on 2 December
- > Review progress
- > Ask questions
- > Complete more challenges



### 04 Maintain Momentum >>

- > Continue with online program
- > Attend regular live workshops
- > ITERATE & GROW!

Maximum clarity  
a center of interest  
lose attention, c  
n be clearly a  
al point or

Deliver powerful insights in any setting with clarity and confidence

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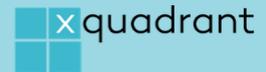


**ENGAGING WORKSHOP SERIES**

*Davina will introduce foundational skills designed to accelerate your growth as a communicator.*

*These two interactive and engaging workshops introduce essential thinking strategies that underpin all executive communication.*

VALUE - \$399



*For the 1st 3 team leaders joining for a year...*

**1-1 leadership coaching session with Richard Medcalf**



*Richard will help you find strategies that will multiply your impact.*

*Learn more about Richard at [xquadrant.com](http://xquadrant.com)*

VALUE - \$2,000

CLARITY FIRST  
PROGRAM

*For the 1st 3 professionals joining for a year...*

## 1-1 communication coaching session with Davina Stanley



*Davina will help you communicate with greater clarity and confidence in any setting.*

*Learn more about Davina further down this page.*

VALUE - \$2,000

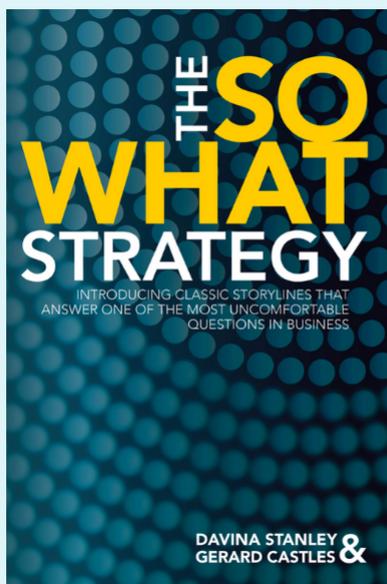


### POWERFUL 90-MINUTE WORKSHOP

*Richard will introduce powerful techniques that will help you multiply your impact.*

*He draws on his extensive experience as both the youngest partner ever in a management consulting firm and as a leader in a global technology company.*

VALUE - \$249



*DIGITAL COPY*

*The So What Strategy helps you avoid being asked one of the most uncomfortable questions in business: "So ... what does that mean?"*

*It introduces the 7 most commonly used storyline patterns that underwrite executive communication.*

VALUE - \$29

[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)



**WE OFFER A 14-DAY NQA GUARANTEE**

# **ASK ME ANYTHING!**

[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)

# **DOORS CLOSE – 16 OCTOBER**

[www.clarityfirstprogram.com/join](http://www.clarityfirstprogram.com/join)

