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lack of accountability. Legacy systems had to be replaced, there were clear inefficiencies, and I was given incentive to tighten up the ship.”

Part of that tightening meant taking a close look at staffing—who was doing what and who should be where. He got three key executives into three critical roles— wholesale gasoline application support, directing retail stores, and managing the wholesale fuel side.

“There was a lot of reshuffling at the top, not everybody fit into the new structure or even wanted to,” says Banks.

With these executives in place, the long history of company knowledge and intellectual property stayed within the company. And wherever he could, he migrated folks who had previously worked as developers into application manager roles to oversee vendors and newly implemented software. In some cases, Banks says, this was a tough transformation. These developers had to quickly get up to speed on the technical skills, but because they knew the system so well, says Banks, their “solid base of business knowledge made it all work.”

Once the team was in place, Banks needed to retain a seat at the table. “I had to get inserted into the board. I found a reason to be at the table every quarter.” In order to ensure that he got the board’s trust early, Banks provided very clear business-oriented objectives—and then delivered. And when mistakes happened, he was honest about them. But for the most part, his team delivered, and their early wins gained them respect. “We had to change the mentality about potential returns on IT investment, and show that IT was not just a cost center,” says Banks.

He relied on his team of senior players, and his own business know-how to get board approval for the changes he needed to make. “I’ve always had business and operational responsibilities, so it’s easy for me to present what’s going on in the technical world in business terms. I drove a business case for every investment we were making. I kept inserting the CIO role as a business driver,” says Banks.

Despite so much progress, challenges remain. “We still have a lot going on simultaneously, the project list is very long.” The other challenge is to stick to governance policies. “There’s always pressure to move a little quicker, we are a heavily audited group and it’s a challenge to stay squeaky clean. But when the board gets good reports from internal auditing, we have an easier time asking for funding,” says Banks.

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Help!

How should I prepare myself to present to the boardroom?

RICK GILBERT, FOUNDER AND CHAIRMAN OF POWERSPEAKING.

Always: Make your first line your bottom line by telling the executives—in a nutshell—what you are proposing why, and exactly what you want from them (funding? support for an organizational change? product approval?).

Executives live with unrelenting time pressure, so they want you to get right to the point. Also, live by the 10/30 Rule: if you are scheduled for 30 minutes on the agenda, prepare just 10 minutes of material. The executives will probably hijack the other 20 minutes for questions and comments. In other words, be prepared for a discussion, not a slide-driven lecture. That means slashing the number of slides to two or three (or even zero). But also be sure to have detailed backup slides on hand in case the executives want to do a data dive.

Sometimes it’s necessary to get your head in the right place before starting your meeting. You don’t want to be going into the boardroom looking for a pat on the back. Surprisingly, many CIOs and even mid-level managers, walk into the executive suite with the need to impress. Senior executives do not want to hear about all of the hard work you and your team did to get the data. They want to be told what the data means relative to your proposal and their decision-making process, and more important, to the success of the company.

Never: Get defensive or argumentative. Having passion for a project or idea is good, but your demeanor should always be calm and open to input.

Also, never let the meeting spiral out of control. If the board strays too far from the point, or worse, starts arguing with each other, calmly bring the discussion back on track.

Rick Gilbert, founder and chairman of executive coaching and corporate training firm PowerSpeaking, advises CIOs to give these tips to staff who will soon make a presentation to top executives.