THE BOARD PROPOSAL TOOLKIT

Six steps to a yes

For anyone taking a proposal to a board or senior committee.



THE BOARD PROPOSAL TOOLKIT

A strong case isn't always enough to get a yes.

Prepare well before the meeting, and the decision on the day is far easier. This toolkit shows you how.

Know who decides, and when	**Steps 1 and 2**
No surprises on the day	**Step 3**
A paper and pitch that start with the decision you want	**Steps 4 and 5**
Leave with a decision, and make it stick	**Step 6**

THE BOARD PROPOSAL TOOLKIT · AT A GLANCE

Six steps to a yes

For anyone taking a proposal to a board or senior committee.

HOW TO USE IT

1. **Find your step** by its timing
2. **Click any step or tool** to jump to it
3. **Print the template** from the back

1 8 WEEKS OUT
Map your approval route

A Route map p.7

B Governance checklist p.9

C Backwards countdown p.11

2 7 WEEKS OUT
Know who matters, and where they stand

A Power and interest grid p.15

B Stakeholder engagement grid p.17

C Influence map p.19

3 6 TO 4 WEEKS OUT
Condition the key people, so there are no surprises on the day

A Conversation plan p.23

B Messenger plan p.25

C No-surprises tracker p.27

4 3 WEEKS OUT
Write the paper and prepare your pitch

A Board paper format p.31

B Your slides: one structure, any length p.33

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5 2 WEEKS OUT
Check your supporting information and test it

A Supporting information checklist p.40

B Hard questions p.42

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6 THE DAY, AND AFTER
Get the decision and follow it through

A Plan for yes, not yet or no p.47

B Get it minuted and confirmed in writing p.49

C Follow through p.51

At the back, ready to print

11 full-page blank tools (p.53 to p.63) · the one-page pitch template (p.64) · the question cards (p.65) · sources (p.68)

How coaching and mentoring can help

Each step ends with ideas for talking it through with someone independent and experienced.

Timings are typical; adjust them to your own approval cycle.

← Back to the map

THE BOARD PROPOSAL TOOLKIT

How to use this toolkit

The big idea: take them with you

The strongest proposals are built with the key people, not presented to them at the end. Keep them posted at each gate: the business requirements, talking to users, the market and supply research, the options, the shortlist, the recommendation. By the time the paper arrives, there should be nothing in it they haven't already seen.

Where this toolkit starts

The countdown begins about eight weeks before the deciding meeting. By then you've involved the key people along the way, and you still believe in what you're taking forward. But you've also learnt that some of them hold positions that need addressing before the final proposal goes into the approvals process. The six steps are about doing exactly that.

How it works

1. Start with the map on page 3. It shows the six steps in order, with typical timings. Adjust them to your own approval cycle.
2. Each step has an overview page, then three tools (A, B and C). Each tool shows a fictional worked example, then how to use it.
3. Short of time? Each overview says which tools give you the essentials.
4. The blank tools, the one-page pitch template and the question cards are at the back, ready to print and fill in by hand, or to copy into your own document.
5. Every page has a link back to the map.

The worked example is fictional. All companies, committees, people and numbers are made up to show how the tools work.

How coaching and mentoring can help. Each step ends with ideas for talking it through with someone independent and experienced.

BOARD PROPOSAL TOOLKIT · STEP 1 OF 6 · 8 WEEKS OUT

Map your approval route

Your route to yes

Big decisions rarely go to just one meeting. Find every level your proposal has to pass, what each one needs from you, and the dates you're working back from.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

Two suppliers in each of four regions. The £2.4m one-off cost is above what the Category Board can approve on its own.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS
A simple map of every meeting your proposal has to pass through, and the dates you're working back from.

WHAT IT'S FOR
So you know, early, who decides, in what order, and what each meeting needs from you.

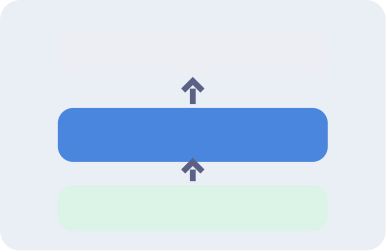
WHAT YOU GAIN
No late surprises about an extra committee or a missed paper deadline. You plan backwards, with time to spare.

IF YOU SKIP IT
You find out about a missed step too late, and the decision slips by a month or more.

Short of time? Get the essentials from tools A and B: who really decides, and when the paper is due. Everything else can be rough.

A

Which levels?



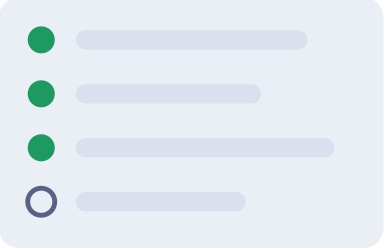
Tool A · Route map

Every committee or level the decision passes through, and the role each one plays.

Open the map →

B

What does each level need?



Tool B · Governance checklist

Dates, deadlines, who decides, who could overrule, and the format they expect.

Open the checklist →

C

When must it be ready?



Tool C · Backwards countdown

Start from the meeting date and work back, so every step has a date.

Open the countdown →

Ask yourself first

"Who could say no to this, and do they know it's coming?"

If you can't answer yet, that's what this step is for.

- **Who would be surprised to find this on the agenda?**
- **What's the step nobody has written down?**



WHAT YOU WALK AWAY WITH

Your route, your dates and the names for step 2

- Category Board: endorse, week -6
- Paper deadline: week -2
- Investment Committee: decide, week 0

How coaching and mentoring can help

- An independent, experienced view on where proposals like yours tend to stall.
- Find the unwritten steps, and the person who quietly has the final say, before they find you.
- Leave with a route and dates you're confident in.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

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Fictional example. The company, committees, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL A · WHICH LEVELS?

Route map

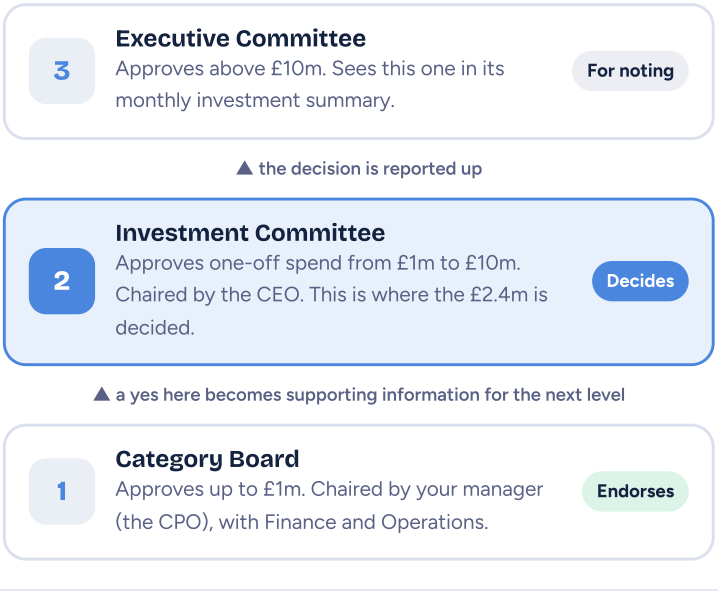
Your company's delegated authority limits decide how high a proposal must go. Each level plays a different role: it endorses, decides, or is told.

WHAT IT IS
A simple ladder of every level your proposal has to pass, and the role each one plays.

WHAT IT'S FOR
To see who endorses, who decides and who is only told, so you know where the real yes is.

WHAT YOU GAIN
Your effort goes on the meeting that decides, and you use each earlier yes as supporting information.

IF YOU SKIP IT
You put all your energy into one meeting, then find another level that can still say no.



Use each yes. Open the Investment Committee paper with: "The Category Board, including Finance and Operations, endorsed this on 14 January." The committee starts from support, not from scratch.

Don't over-prepare the top. The Executive Committee only notes it. One line in their summary is enough, so save your effort for level 2.

How to use it

1. Find your company's delegated authority limits (Finance or the company secretary will have them). Check which level your total cost falls into, and whether contract value or length also counts.
2. List every level from the bottom up, including any your own function needs first, such as a category or sourcing board.
3. Mark each level's role: **endorses** (recommends upward), **decides** (the real yes), or **for noting** (is told).
4. Ask someone who has been through it recently: "Is there a step that isn't written down?" There often is, such as a pre-meeting with the CFO.
5. Put most of your effort where the role is "decides".

Your blank route map

A full-page blank is at the back of this toolkit (page 53). Print it and fill it in by hand, or copy it into your own document.

Source: based on standard corporate governance practice for delegated authority (schemes of delegation, set by each company's board). No single author. Using each yes as supporting information for the next level draws on social proof, one of Robert Cialdini's principles of influence (Influence, 1984). The committees, limits and dates here are fictional.

How coaching and mentoring can help

- An independent, experienced view on where proposals like yours tend to stall.
- Find the unwritten steps, and the person who quietly has the final say, before they find you.
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TOOL B · WHAT DOES EACH LEVEL NEED?

Governance checklist

One column for each level on your route map. Fill in every box before you write a word of the paper. The gaps are your questions for the committee secretary.

WHAT IT IS
A checklist of what each level needs from you: dates, deadlines, format, sign-offs and who really decides.

WHAT IT'S FOR
To make sure nothing about the process catches you out.

WHAT YOU GAIN
A paper in the right format, signed off, and in on time.

IF YOU SKIP IT
A missed deadline or a missing sign-off pushes your decision back to the next meeting.

Check	Category Board	Investment Committee	Executive Committee
Role	Endorses	Decides	For noting
Meeting date	Week −6	Week 0	Week +2
Paper deadline	1 week before	2 weeks before, to the secretary	Summary prepared by Finance
Decision, discussion or noting?	Decision to endorse	Decision	Noting
Who chairs	Your manager (CPO)	CEO	CEO
Who really decides	CPO, with Finance	CFO and CEO	n/a
Who could overrule or delay	Operations Director	Operations Director, CFO	Anyone who is surprised
Required format	Category strategy template	Committee template: 4 pages, plus appendix	One line in the summary
Sign-offs needed first	Category lead	Finance validates savings; Quality and Legal sign off	None
Time you'll get	30 minutes	15 minutes, often cut to 5	None

How to use it

1. Ask the committee secretary for the forward agenda, the paper deadline and the template. Secretaries are often the most useful people in the building.
2. Check whether your item is for decision, discussion or noting. If it says "discussion" and you need a decision, ask now, not on the day.
3. Write down who really decides, which isn't always the chair, and who could overrule or delay it. They go straight into step 2.
4. List the sign-offs you need before the deadline. Finance agreeing your savings is usually the one that takes longest.
5. Note how long you'll get, then plan for half of it.

The format is set for you. If the committee has its own template, use it. Step 4 shows you how to make page 1 say clearly what decision you want, inside any format.

Watch the real deadline. The paper is due two weeks before the meeting, but Finance needs a week to validate the savings. So your real deadline is three weeks out.

Your blank checklist

A full-page blank is at the back of this toolkit (page 54). Print it and fill it in by hand, or copy it into your own document.

Source: a general checklist drawn from common board and committee practice, such as forward agendas, paper deadlines and "for decision, discussion or noting" items. No single author. All committees, people and timings here are fictional.

How coaching and mentoring can help

- An independent, experienced view on where proposals like yours tend to stall.
- Find the unwritten steps, and the person who quietly has the final say, before they find you.
- Leave with a route and dates you're confident in.

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TOOL C · WHEN MUST IT BE READY?

Backwards countdown

Put the meeting where the decision is made at week 0, then work back. Every step in this toolkit gets a date, and you can see straight away if you've started too late.

WHAT IT IS
A timeline that works back from the date of the deciding meeting.

WHAT IT'S FOR
To put a date on every step, starting with the ones that take longest.

WHAT YOU GAIN
You can see straight away whether you've started in time, and what has to happen this week.

IF YOU SKIP IT
You run out of time for the conversations that matter, and rush the paper at the end.

First, work out your own timings

There is no standard countdown. Before you set dates, sort what you need to do into what takes a long time and what can happen close to the day.

Further out: things with a long lead time

- Finding the committee dates and paper deadlines
- Any earlier approval levels, which run to their own calendars
- Getting time in senior diaries for one-to-ones
- Data for the baseline, and Finance checking the savings
- Sign-offs from other functions, such as Legal, Quality or Sustainability

Near term: things that can happen close to the day

- Final drafting of the paper and the pitch
- A dry run with a colleague
- Last checks with your key supporters
- Confirming your time slot and who will be in the room

In our example: eight weeks was judged about right to allow the work to be done and meet every deadline. The Category Board meets monthly, the CFO's diary needs a few weeks' notice, and Finance needs time to check the savings. Yours could be much shorter or much longer. Ask yourself: what is the longest lead time in my plan, and when does it need to start?

Week −8	Step 1: map the route, and talk to the committee secretary
Week −7	Step 2: map the people
Week −6	Category Board endorses The first yes, which becomes supporting information for the next level
Weeks −5 to −4	Step 3: one-to-ones with the CFO, the Operations Director and the regional GMs
Week −3	Step 4: paper drafted. Finance starts validating the savings
Week −2	**Paper deadline to the secretary** Step 5: supporting information checked, full draft tested with a colleague
Week 0	**Investment Committee decides** Step 6: get the decision
Within 24 hours	Step 6: confirm in writing, send what you promised, and thank your supporters
Week +2	Executive Committee notes it

Starting late? Don't skip steps 2 and 3. Squeeze the writing instead. A short paper the right people already support beats a polished one that surprises them.

Build in slack. Committee dates move. Leave a spare week before the paper deadline, and know the next meeting date in case you need it.

How to use it

1. Write the date of the deciding meeting at week 0.
2. Mark the paper deadline and any earlier levels from your checklist.
3. Work back from the deadline: sign-offs, drafting, one-to-ones, people mapping.
4. Put real dates in your calendar, including the one-to-ones you still need to book.
5. Check it weekly. If one date slips, move the ones that depend on it straight away.

Your blank countdown

A full-page blank is at the back of this toolkit (page 55). Print it and fill it in by hand, or copy it into your own document.

Source: backward planning (working back from a fixed date), a long-standing project planning technique with no single author. The timings are typical, not fixed; your committee's calendar sets the real ones.

How coaching and mentoring can help

- An independent, experienced view on where proposals like yours tend to stall.
- Find the unwritten steps, and the person who quietly has the final say, before they find you.
- Leave with a route and dates you're confident in.

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BOARD PROPOSAL TOOLKIT · STEP 2 OF 6 · 7 WEEKS OUT

Know who matters, and where they stand

Decisions are made by people before they are made in the room. Three quick tools show you who to spend your time on, and how.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

Two suppliers in each of four regions. The paper goes to a fictional Investment Committee.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS
A picture of the people who can shape the decision: how much power they have and where they stand today.

WHAT IT'S FOR
So you spend your time on the few people who matter most, whether they're likely to support it or oppose it.

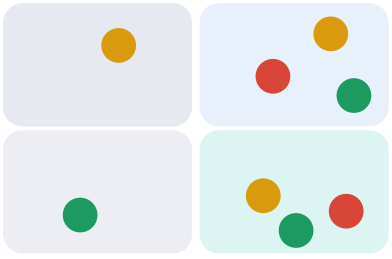
WHAT YOU GAIN
You see who could stop it, who could carry it, and who needs moving, before the meeting rather than in it.

IF YOU SKIP IT
Someone you overlooked raises an objection on the day, and others follow them.

Short of time? Skip the full grid. List the three or four people who could block it, or whom others follow. Note where each one stands, and who should speak to them.

A

Who matters?



Tool A · Power and interest grid

Place everyone by how much they can shape the decision, and how much they care.

Open the grid →

B

Who will you move, and how?



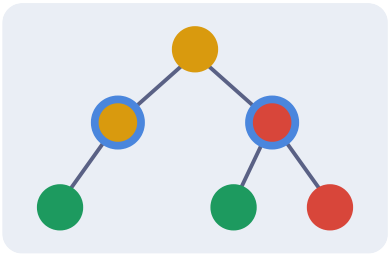
Tool B · Stakeholder engagement grid

For each key person: what they care about, where they stand, the question they'll ask.

Open the grid →

C

Who moves whom?



Tool C · Influence map

Draw who listens to whom. Find the few people who bring others with them.

Open the map →

Ask yourself first

"Who could stop this, and do I know what they need?"

- Whose support would bring others with them?
- Who haven't I thought of yet?

WHAT YOU WALK AWAY WITH

Your priority one-to-ones for step 3: Condition the key people

- Operations Director
- CFO
- Regional GM, Asia Pacific
- Quality Director

How coaching and mentoring can help

- Talk through the people who matter, confidentially, with someone outside your organisation's politics.
- Plan how to approach the person who could block you, with someone senior who knows how leaders like them think.
- Leave knowing what each key person needs, and how you'll move them.

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TOOL A · WHO MATTERS?

Power and interest grid

Not everyone needs the same effort. Place each person by their power over the decision and their interest in it. Tap a person to see their card.

WHAT IT IS
A grid that places each person by how much power they have over the decision, and how much it affects them.

WHAT IT'S FOR
To decide where to spend your effort, and who can simply be kept informed.

WHAT YOU GAIN
A short list of the people you must manage closely.

IF YOU SKIP IT
You can't see who could block your proposal, or who you need to win over beforehand. You find out in the meeting, when it's too late.



MANAGE CLOSELY

Operations Director

Runs the sites

Cares about	No disruption to supply at any site
Stands now	Against
Will ask	*"What happens if one of the eight new suppliers fails?"*
Best person to approach them	Your manager, peer to peer

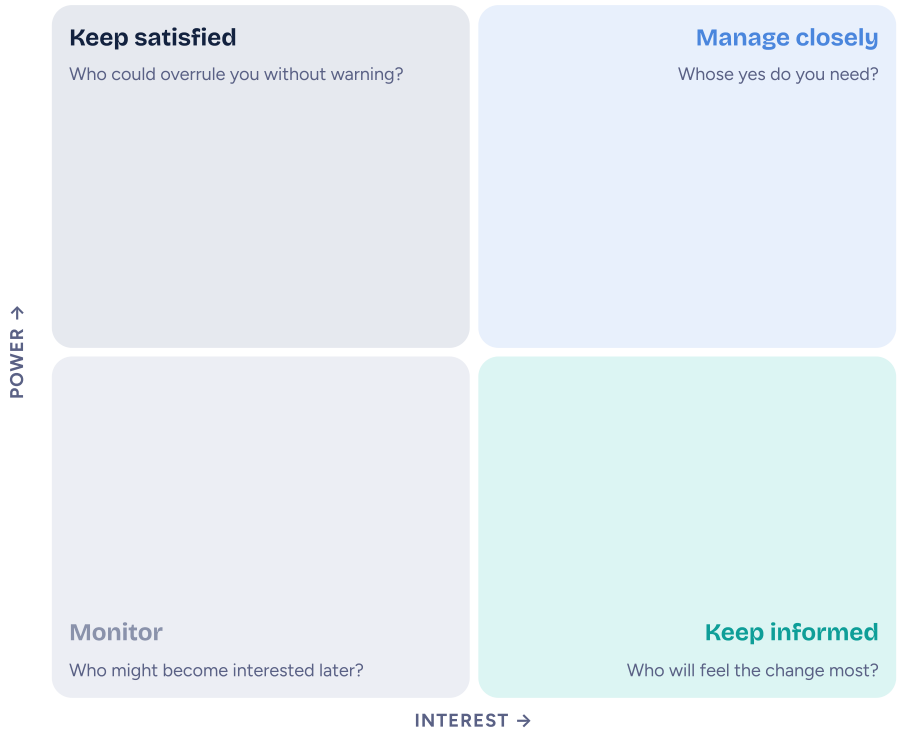
Look at the top right. The CFO and the Operations Director hold the £2.4m and the sites. One is undecided and one is against. That is where your time goes.

How to use it

1. List everyone who will decide, advise or be affected: committee members, the people who brief them, and the people who will feel the change.
2. Place each one. **Power:** can they approve, block or sway the decision? **Interest:** how much does it impact their budget, sites or team?
3. Colour each one: **For** in green, **Neutral** in yellow, or **Against** in red. If you don't know, that is your first conversation.
4. Let the quadrant decide how much effort each person gets. Anyone in **Manage closely** who isn't yet **For** goes onto your list of one-to-one conversations for step 3, **Condition the key people**.
5. Move them as you learn more. People shift as the date gets closer.

Your blank grid

Sketch it on paper, or copy the four boxes onto a whiteboard.



Based on the power and interest grid by Aubrey Mendelow (1991), widely used in stakeholder management. All people and positions here are fictional.

How coaching and mentoring can help

- Talk through the people who matter, confidentially, with someone outside your organisation's politics.
- Plan how to approach the person who could block you, with someone senior who knows how leaders like them think.
- Leave knowing what each key person needs, and how you'll move them.

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TOOL B · WHO WILL YOU MOVE, WHERE TO, AND HOW?

Stakeholder engagement grid

One row for each person in the top half of your power and interest grid. The gap between where they are and where you need them is your work. Step 3, Condition the key people, turns each row into a conversation.

WHAT IT IS
A table of where each key person stands today, where you need them, and how you'll move them.

WHAT IT'S FOR
To turn the grid into a plan of action, person by person.

WHAT YOU GAIN
A clear list of who to talk to, what to say, and who should say it.

IF YOU SKIP IT
You know who matters but not what to do about it, and the meeting decides for you.

Person	What they care about	Where they stand now → where you need them	The question they'll ask	How you'll move them	Best person to approach them
1. Operations Director Manage closely	No disruption to supply at any site	Against → Neutral	*"What happens if one of the eight new suppliers fails?"*	Share the supply continuity plan: two suppliers in each region, so if one fails the other covers. Offer a trial at one site first.	Your manager, peer to peer
2. CFO Manage closely	Cash, and being certain the savings are real	Neutral → For	*"How sure is the 8%, and when does the £2.4m pay back?"*	Agree the baseline and the 8% with Finance first. Then take the CFO through the payback before the paper goes in.	You, after Finance has checked and agreed the numbers
3. CEO Keep satisfied	Strategy, reputation, and trusting the numbers	Neutral → For	*"Does this fit where we're taking the business?"*	Link the proposal clearly to the business strategy, and let the CFO's support speak for it.	The CFO, once you've won them, plus a short note from your manager
4. Regional GM, Asia Pacific Keep informed	Local relationships and service	Against → Neutral	*"Why lose suppliers who've served us for years?"*	Meet with the regional category lead. Show how local service is kept, and agree a phased move for Asia Pacific.	You, with the regional category lead
5. Quality Director Keep informed	One standard everywhere, and fewer complaints	Neutral → For	*"How will you prove quality gets better?"*	Show how one specification cuts complaints, and ask them to say so in the meeting.	You, with the single specification plan

How to use it

1. **What they care about:** think about their targets, their worries and what they'll be judged on. Ask people who work with them.
2. **Now → need:** be honest about today. You don't need everyone for you. Sometimes "won't block it" is enough.
3. **Their question:** write it in their words. It becomes a line in your pitch, or an answer you have ready.
4. **Best person to approach them:** it isn't always you. A peer, someone more senior, your manager, Finance, or someone in their own team they rely on may be the person they listen to most.

Short of time? Decide who comes first. Start with anyone who could block it, then the people others follow, then the undecided with real power. Brief your supporters last, so they speak up for you. In the example, that puts the Operations Director first and the CFO second, which is the order of the rows above.

Spot the biggest gaps. The Operations Director and the Regional GM for Asia Pacific are both against. Each needs a different messenger and a different answer.

Find a hidden ally. The Quality Director wants one standard and fewer complaints. The proposal gives them both, so they could speak up for you.

Your blank grid

A full-page blank is at the back of this toolkit (page 56). Print it and fill it in by hand, or copy it into your own document.

The now → need idea follows the commitment chart of Richard Beckhard and Reuben Harris (1977). All people, roles and views here are fictional.

How coaching and mentoring can help

- Talk through the people who matter, confidentially, with someone outside your organisation's politics.
- Plan how to approach the person who could block you, with someone senior who knows how leaders like them think.
- Leave knowing what each key person needs, and how you'll move them.

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TOOL C · WHO MOVES WHOM?

Influence map

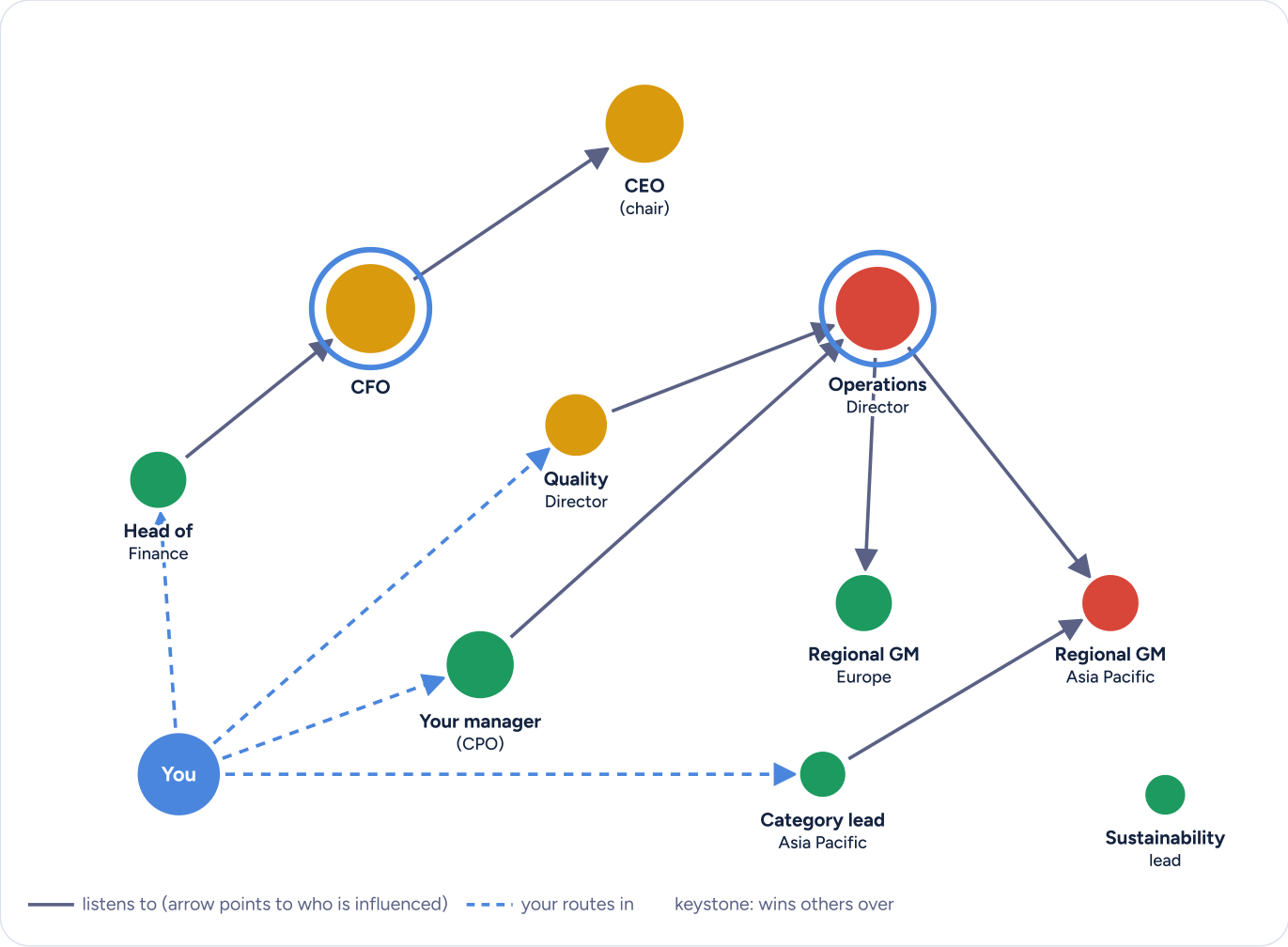
Committees rarely decide person by person. Some people follow others. Win the right two or three, and much of the room follows. Use it in the weeks before the meeting, to find who can help you move people from Neutral to For, or from Against to Neutral.

WHAT IT IS
A simple drawing of who listens to whom.

WHAT IT'S FOR
To find the few people whose support brings others with them, and your best route to each one.

WHAT YOU GAIN
Less effort: win two or three key people and much of the room follows.

IF YOU SKIP IT
You try to persuade everyone yourself, including people who would listen to someone else far more.



How to use it

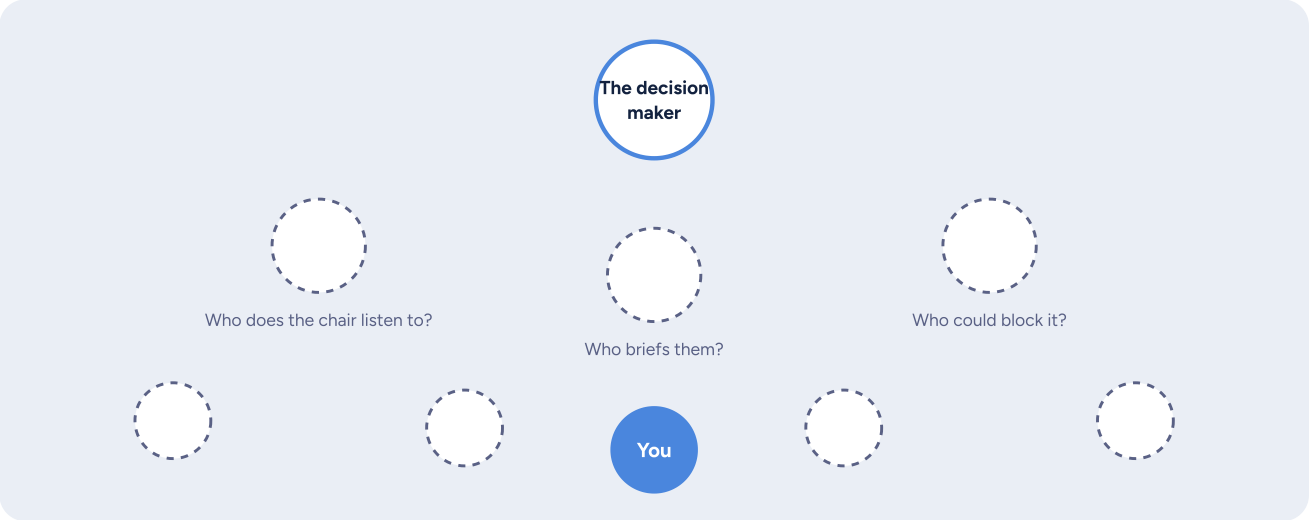
1. Put the decision maker at the top, usually the chair. Add the people from your power and interest grid.
2. Draw an arrow for each "who listens to whom". Think peers, more senior colleagues, the people in their own team they rely on, trust, history and who sits next to whom.
3. Circle the keystones: the people with the most arrows going out to people who matter.
4. Add yourself, and draw your routes in. Where you have no route, find someone who has.

Read the example. The CEO follows the CFO. Both Regional GMs follow the Operations Director. So win the CFO and the Operations Director, and most of the room follows.

Your best route. You can't easily reach the Operations Director. Your manager can, as a peer. That one conversation may matter more than your slides.

Your blank map

Draw it on one page. It takes ten minutes.



Source: influence or relationship mapping, a common stakeholder management technique with no single author. All people and relationships here are fictional.

How coaching and mentoring can help

- Talk through the people who matter, confidentially, with someone outside your organisation's politics.
- Plan how to approach the person who could block you, with someone senior who knows how leaders like them think.
- Leave knowing what each key person needs, and how you'll move them.

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BOARD PROPOSAL TOOLKIT · STEP 3 OF 6 · 6 TO 4 WEEKS OUT

Condition the key people, so there are no surprises on the day

By the time your paper reaches the table, the people who matter should already know what's coming, have had their say, and be leaning towards yes. That happens in one-to-ones, not in the meeting.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

From step 2: the Operations Director and the Regional GM for Asia Pacific are against, and the CFO is undecided.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS
A plan for short, one-to-one conversations with the key people before the meeting.

WHAT IT'S FOR
So nobody hears your proposal for the first time in the room.

WHAT YOU GAIN
You hear their concerns early, can answer them, and they arrive leaning towards yes.

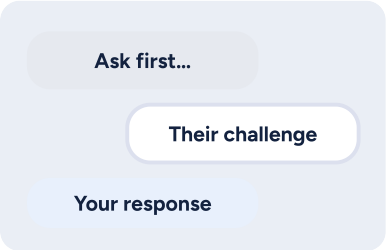
IF YOU SKIP IT
Concerns come out in the meeting, in front of everyone, when they're hardest to handle.

Short of time? Talk first to anyone who could block it, then to the people others follow. Two good conversations beat six rushed ones.

This starts long before the paper. The best proposals are built with the key people, keeping them posted at each gate: the business requirements, talking to users, the market and supply research, the options and the shortlist. In our example, this is what the team did. You still believe in the proposal, but those early conversations showed some positions that need addressing before it goes for approval. That's what this step is for.

A

What will you say?



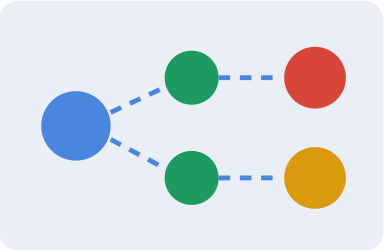
Tool A · Conversation plan

For each key person: the outcome you want, how you open, what they'll push back on, and your answer.

Open the plan →

B

Who should say it?



Tool B · Messenger plan

The right person to open each door: you, your manager, Finance or a trusted peer.

Open the plan →

C

Anyone still surprised?

Tool C · No-surprises tracker

Who has been seen, what changed, and who you still need to reach before the paper goes in.

Open the tracker →

The coaching approach: ask first, then share your view

"What would you need to see to feel comfortable supporting this?"

Open each one-to-one with a question, not a pitch. When people work out their concern out loud, you learn what really matters to them, and they feel heard. Then share your view, shaped around what they've told you. Telling them first can't do that.

- **What would they need to hear from me to walk in leaning towards yes?**
- **What am I avoiding saying to them?**

WHAT YOU WALK AWAY WITH

Key people leaning towards yes, and their concerns built into your paper (step 4)

- CFO: agrees the savings
- Operations Director: won't block it
- GM Asia Pacific: understands the plan

How coaching and mentoring can help

- Rehearse a difficult conversation with someone senior, before you have it with the person who matters.
- Honest feedback on how you come across, from someone with no stake in the outcome.
- Leave with your opening question, and a plan for each conversation.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL A · WHAT WILL YOU SAY?

Conversation plan

Prepare each one-to-one the way you'd prepare a negotiation: know the outcome you want, how you'll open, what they'll push back on, and how you'll respond. You're not negotiating with them, but the thinking is the same.

WHAT IT IS
A one-page plan for each conversation: the outcome you want, the question you'll open with, the challenge you expect, how you'll respond, and the next step you'll ask for.

WHAT IT'S FOR
To prepare for each one-to-one, so you listen first and then make your case.

WHAT YOU GAIN
You hear their concerns while there's still time to act on them, and get your first chance to move them towards your chosen outcome.

IF YOU SKIP IT
You go in unprepared, talk too much, and miss what's really worrying them.

1. Operations Director

● Against → Neutral

OUTCOME YOU WANT

Won't block it, and agrees the transition safeguards

OPEN BY ASKING

"What worries you most about changing suppliers at your sites?"

LIKELY CHALLENGE

"What happens if one of the eight new suppliers fails? I can't have a line stop."

YOUR RESPONSE

Two qualified suppliers in every region, so there's always a second source. The move goes site by site, with six weeks of overlapping stock.

THE NEXT STEP YOU'LL ASK FOR

"Could one of your site managers help us plan the first switch?"

2. CFO

● Neutral → For

OUTCOME YOU WANT

Agrees the savings figure, and lets Finance say so in the paper

OPEN BY ASKING

"Before I finalise this, what would you need to see to be confident in the savings?"

LIKELY CHALLENGE

"How sure is the 8%? Savings like this have slipped before."

YOUR RESPONSE

The prices come from binding tender bids, not estimates. Finance has validated them. The only variable is fibre cost, and it's shared through an index in the contracts.

THE NEXT STEP YOU'LL ASK FOR

"Would you be happy for the paper to say Finance has validated the savings?"

3. Regional GM, Asia Pacific

● Against → Neutral

OUTCOME YOU WANT

Understands why, and doesn't speak against it

OPEN BY ASKING

"What matters most to you in how your region is supplied?"

LIKELY CHALLENGE

"Why lose suppliers who've served us well for years?"

YOUR RESPONSE

Asia Pacific keeps two regional suppliers, and one of them is a current partner. Service levels will be written into the contracts.

THE NEXT STEP YOU'LL ASK FOR

"Would you join the supplier review for your region?"

How to use it

1. Start with the people from step 2 whose "now" and "need" don't match. Book them first: they need the most time.
2. **Outcome:** be specific and realistic. "Won't block it" is often enough.
3. **Open by asking:** one open question about their concern, not your proposal. Then listen, and let them talk it through.
4. **Challenge and response:** write their likely push-back in their words, and a short, honest answer. If you don't have one, you've found a gap to fix before the paper.
5. **The next step you'll ask for:** where it fits, end with one small, clear request. Then write down what you learned, and change the paper if you need to.

Why ask for a next step? The aim is to move them, and not every conversation needs a request. But a small step they agree to, like lending a site manager or joining a review, shows they really have moved, not just been polite. It also helps the shift stick: people tend to stand by what they've agreed to do (Robert Cialdini calls this commitment and consistency), and it turns a possible blocker into someone with a stake in success.

Who first? Follow the order from step 2: anyone who could block it, then the people others follow. Here that's the Operations Director, then the CFO. If time runs short, those two conversations matter most.

Listen for what's not said. If the Operations Director keeps returning to one site, that's the real worry. Address that, and the rest often follows.

Change the paper, visibly. "After talking to Operations, we've added six weeks of overlapping stock." People support what they helped shape.

Your blank conversation plan

A full-page blank is at the back of this toolkit (page 57). Print it and fill it in by hand, or copy it into your own document.

Source: adapted from negotiation planning (opening, likely objections, responses), a common practice with no single author. "Ask first, then share" reflects the core of most coaching approaches. Why a small next step helps it stick: the commitment and consistency principle described by Robert Cialdini in Influence (1984). The classic evidence is the "foot in the door" study by Jonathan Freedman and Scott Fraser (1966). All people and views here are fictional.

How coaching and mentoring can help

- Rehearse a difficult conversation with someone senior, before you have it with the person who matters.
- Honest feedback on how you come across, from someone with no stake in the outcome.
- Leave with your opening question, and a plan for each conversation.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

TOOL B · WHO SHOULD SAY IT?

Messenger plan

The right messenger can matter more than the message. Use your network to open the doors you can't open yourself, at the level you can't reach.

WHAT IT IS
A plan for who carries each message to each key person.

WHAT IT'S FOR
To use the people they already listen to, rather than relying on yourself.

WHAT YOU GAIN
Your message carries more weight, and reaches people you can't easily reach yourself.

IF YOU SKIP IT
Some people hear about it from the wrong person, or not at all, and dig in.

You with Finance's validation	**CFO** Hears the numbers first-hand, already checked by their own team
Your manager (CPO) peer to peer	**Operations Director** A colleague at the same level, not a request from below
Category lead, Asia Pacific with you	**Regional GM, Asia Pacific** Someone they already work with and trust
CFO once won	**CEO (chair)** The CEO follows the CFO on the numbers

How to use it

1. Take your influence map from step 2. For each key person, ask: who do they already listen to?
2. Choose the messenger, and brief them: the one message, the likely question and your answer. Keep it to one page.
3. Ask your manager to condition the level above you. It's part of their role, and most are glad to be asked.
4. Agree when each conversation will happen, and ask the messenger to tell you how it went.

Order matters. See the CFO before the CEO, and the Operations Director before the regional GMs. People check with the person they listen to and trust before they make up their minds.

Your blank messenger plan

A full-page blank is at the back of this toolkit (page 58). Print it and fill it in by hand, or copy it into your own document.

Source: using trusted messengers and your network is common stakeholder management practice, with no single author. All people here are fictional.

How coaching and mentoring can help

- Rehearse a difficult conversation with someone senior, before you have it with the person who matters.
- Honest feedback on how you come across, from someone with no stake in the outcome.
- Leave with your opening question, and a plan for each conversation.

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL C · ANYONE STILL SURPRISED?

No-surprises tracker

Before the paper goes in, every key person should have heard about it from you or your messenger. Track it, so no one hears it for the first time in the meeting.

WHAT IT IS
A simple tracker of who you've spoken to, what they said and what's still open.

WHAT IT'S FOR
To check that nobody important will hear it for the first time in the meeting.

WHAT YOU GAIN
No surprises on the day, and concerns dealt with before you walk in.

IF YOU SKIP IT
Someone you meant to speak to raises an objection in the room, and others follow.

Person	Status	What they said	What you changed	Told them?
CFO	✓ Agreed	Wants Finance named as validating the savings	Added "validated by Finance" to page 1	✓ Sent them the wording
Operations Director	✓ Seen	Worried about the switch at the two largest sites	Added six weeks of overlapping stock, and those two sites go last	✓ Showed them the revised plan
Regional GM, Asia Pacific	◦ Booked	Meeting next Tuesday, with the category lead	–	–
Quality Director	✓ Supportive	Likes the single specification	Will speak up for it if asked	–
CEO (chair)	× Not yet	–	CFO to mention it at their weekly catch-up	–

How to use it

1. List everyone from the top half of your power and interest grid.
2. After each conversation, note what they said in their words, and what you'll change because of it.
3. Close the loop. Go back and show them how their point is now in the paper: "You raised the risk at the two big sites, so they now go last." People support what they can see they helped to shape.
4. Review it a week before the paper deadline. Anyone still marked "not yet" is a risk: find a route to them now.

The golden rule: no surprises on the day. A senior manager who is surprised in front of their peers will often say "not yet", even if they would have agreed in private.

Your blank tracker

A full-page blank is at the back of this toolkit (page 59). Print it and fill it in by hand, or copy it into your own document.

Source: "no surprises" is a widely used principle in board and stakeholder work, with no single author. All people here are fictional.

How coaching and mentoring can help

- Rehearse a difficult conversation with someone senior, before you have it with the person who matters.
- Honest feedback on how you come across, from someone with no stake in the outcome.
- Leave with your opening question, and a plan for each conversation.

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BOARD PROPOSAL TOOLKIT · STEP 4 OF 6 · 3 WEEKS OUT

Write the paper and prepare your pitch

Start from the analysis you already have. Think bottom up, tell it top down. If your 20 minutes became 5, what would you keep? That's your answer, and it goes first in both your paper and your pitch. Then your case stands, even when someone reads page 1 without you.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

Two suppliers in each of four regions. What the people in step 3 told you is now built into the paper.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS
A way to write the paper and prepare your pitch with the answer first, in a few versions of different lengths.

WHAT IT'S FOR
So busy committee members get your point, and what you're asking for, in the first minute.

WHAT YOU GAIN
A paper that's easy to read and a pitch that still works if your time slot is cut short.

IF YOU SKIP IT
Your key message gets lost in the detail, and the committee asks you to come back.

Short of time? Get page 1 right: the decision you want, and why, in a few lines. Then practise your 30-second version.

A

What goes on page 1?



Tool A · Board paper format

Outcome expected, Situation, Target, Proposal. Page 1 says what decision you want.

Open the format →

B

How long have you got?



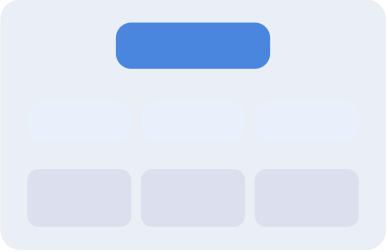
Tool B · Your slides: one structure, any length

The same proposal at 2, 5 and 20 minutes. Same order every time; only the depth changes.

See all three →

C

How will you say it?



Tool C · Your pitch: start and finish with the decision you want

What you'll say with your slides: your opening and close word for word, at 20 minutes, 5 minutes, 2 minutes and 30 seconds.

Open →

Ask yourself first

"If they read only my first paragraph, would they know what I'm asking for, and why?"

Better still, ask a colleague to read it cold and tell you what they think you want. If their answer isn't yours, rewrite the top.

- **If I had only 30 seconds, what would I keep?**
- **Which of my three reasons matters most to them, rather than to me?**

WHAT YOU WALK AWAY WITH

A paper whose first page says what decision you want, and a pitch that fits any time slot

Page 1 ready · Detail in the appendix, for step 5 · Opening and close, plus 5-min, 2-min, 30-sec versions

How coaching and mentoring can help

- An independent, experienced review of your paper and pitch, with questions rather than rewrites.
- Leave with the one sentence your committee most needs to hear first.
- Practise your full pitch, at any length, with an experienced listener who asks the questions your committee is likely to ask.

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TOOL A · WHAT GOES ON PAGE 1?

Board paper format

Four short blocks, in this order. Put them in your committee's own template if it has one. Everything else goes in the appendix.

WHAT IT IS
A one-page format for the front of your paper: the decision you want, the situation, the target and your proposal.

WHAT IT'S FOR
To give busy committee members your answer, and the decision you want, in the first minute.

WHAT YOU GAIN
A paper that's easy to read, and easy to say yes to.

IF YOU SKIP IT
The decision you want gets lost on page 9, and the committee asks for more work.

Investment Committee · For decision — Paper packaging supply base · Page 1 of 4

OUTCOME EXPECTED	**The committee is asked to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m.** Recommended by the Category Board. Figures validated by Finance. The plan reflects points raised by the CFO, Operations and the regional teams.
SITUATION	We spend £120m a year on paper packaging with 38 suppliers, mostly bought site by site. Quality varies between sites: packaging faults stopped our lines 40 times last year, and customer complaints about damaged packs rose by a quarter. Two suppliers are under financial strain, and the supply base is too fragmented to bring us new ideas.
TARGET	Lower cost, consistent quality and new ideas from suppliers, with secure supply in every region, while meeting our 2030 sustainability commitments.
PROPOSAL	Eight suppliers, two in each of four regions, chosen through a full tender. Savings of about 8% a year (£9.6m), validated by Finance. The move runs site by site over 12 months, with six weeks of overlapping stock. We assessed four options, and this one came out best on savings, quality and innovation.

How to use it

1. **Outcome expected** goes first: one sentence that says exactly what you want them to decide. If your approval route has an earlier forum (step 1), say that it has recommended the proposal.
2. **Situation:** where we are now and what has changed, in two or three sentences.
3. **Target:** what good looks like, in their terms: cost, risk, quality, growth.
4. **Proposal:** what you'll do, what it delivers and what it costs, plus one line on the options considered.
5. Build in what you heard in step 3 ("validated by Finance", "six weeks of overlapping stock"), so people see their concerns answered.

The page-1 test. Papers are often read the night before, or forwarded to someone who wasn't there. Page 1 has to win the argument on its own.

Short at the top, solid underneath. All the supporting detail goes in the appendix: for example, the options scoring, market analysis and risk register. That's not hiding them: anyone who digs in reaches the same answer as you.

Your blank page 1

A full-page blank is at the back of this toolkit (page 60). Print it and fill it in by hand, or copy it into your own document.

Source: Situation, Target, Proposal is a widely used briefing structure. Putting the outcome first follows Barbara Minto's advice to lead with the answer (*The Pyramid Principle*). Naming who validated the figures, such as Finance, draws on authority, another of Cialdini's principles. All figures here are fictional.

How coaching and mentoring can help

- An independent, experienced review of your paper and pitch, with questions rather than rewrites.
- Leave with the one sentence your committee most needs to hear first.
- Practise your full pitch, at any length, with an experienced listener who asks the questions your committee is likely to ask.

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TOOL B · YOUR SLIDES: HOW LONG HAVE YOU GOT?

One structure, any length

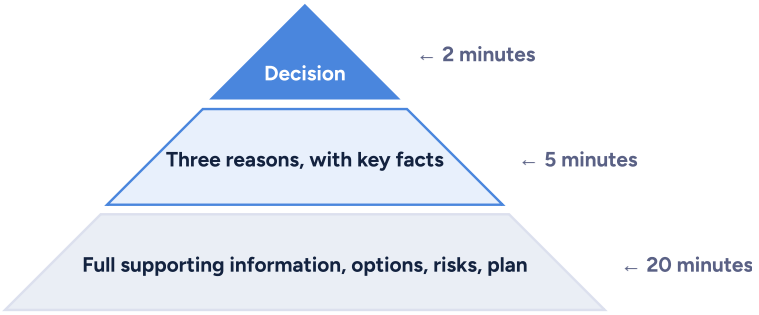
Think bottom up, tell it top down. The order never changes: the decision you want, then three reasons, then the supporting information. What changes with the time you have is how far down the pyramid you go.

WHAT IT IS
Your slide pack, built top down, so the same slides work at 2 minutes, 5 minutes or 20 minutes.

WHAT IT'S FOR
So you're ready whatever time you're given, and a cut time slot doesn't throw you.

WHAT YOU GAIN
One paper you can shorten or expand on the day without starting again.

IF YOU SKIP IT
Your time is cut, and you have to decide on the spot what to leave out.



Tell it top down: always start at the top. More time, go further down.

2 minutes

The decision you want: "I'm asking you to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m."

Three reasons: it saves about 8% a year, it means fewer line stoppages and half the complaints, and each supplier has committed to 10% lighter packs within two years, then ongoing design and efficiency improvements.

The close: "Can I have your decision?"

5 minutes

The decision you want, as in the 2-minute version.

1. Savings: £9.6m a year (about 8%), based on binding tender prices and validated by Finance.

2. Quality: one specification worldwide, with two suppliers per region we can manage closely. We expect line stoppages from packaging faults, and customer complaints, both to halve.

3. Innovation: each supplier committed in the tender to cut pack weight by 10% within two years.

The close: "Approve today, and we start the first region in the next quarter. Can I have your decision?"

20 minutes

The decision you want, as before.

1. Savings: the key fact, then the tender results and how Finance checked them.

2. Quality: the key fact, then the line stoppage and complaint figures.

3. Innovation: the key fact, then, if challenged, the lighter-pack and ongoing improvement commitments suppliers made in the tender.

Then: the four options compared, the risks and how you'll manage them, and the plan.

The close, then questions.

More time means more supporting information under each reason, never a different order.

How to use it with your own draft

1. **Write your 2-minute version first:** the decision you want, three reasons, the close. That's the top of your pyramid.
2. **For 5 minutes,** add the one fact that proves each reason.
3. **For 20 minutes,** add the rest of your supporting information under the reason it supports. Anything that doesn't support a reason goes in the appendix.

If your draft tells it bottom up, building to the answer at the end

It feels logical, because that's the order you did the work. But the committee can't tell which facts matter until they know what you're asking for. And if your time slot is cut short, they may never hear your answer. Move it to the front.

Source: leading with the answer and grouping the support beneath it follows Barbara Minto, *The Pyramid Principle*. The case and numbers are fictional.

How coaching and mentoring can help

- An independent, experienced review of your paper and pitch, with questions rather than rewrites.
- Leave with the one sentence your committee most needs to hear first.
- Practise your full pitch, at any length, with an experienced listener who asks the questions your committee is likely to ask.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL C · HOW WILL YOU SAY IT?

Your pitch: start and finish with the decision you want

Write down, then rehearse, exactly what you'll say in support of the slide pack you've created. The slides stay the same. What you say flexes to the time you're given, and starts and finishes with the decision you want.

WHAT IT IS
Your script for the meeting: what you'll say with each slide, and your opening and close word for word.

WHAT IT'S FOR
So you can give it in 20 minutes, 5 minutes, 2 minutes or 30 seconds, using the same slides.

WHAT YOU GAIN
You know exactly what you'll say, whether you get your full time or it's cut short.

IF YOU SKIP IT
Unscripted, you can't test it with anyone first. On the day you risk not making the case well enough to get approval.

Your slides, and what you say with each one

1 · The decision you want	"I'm asking the committee to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m."
2 · Savings	"It saves about £9.6m a year. Those are binding tender prices, and Finance has validated them."
3 · Quality	"We expect line stoppages from packaging faults, and customer complaints, both to halve."
4 · Innovation	"Each supplier committed in the tender to 10% lighter packs within two years, then ongoing design and efficiency improvements."

Talk to each slide; don't read it out. The slide shows the point; your words carry it.

Your opening and your close

FIRST 20 SECONDS
"I'm asking the committee to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m. It saves about £9.6m a year, validated by Finance."

THE MIDDLE
Three reasons: savings, quality, innovation. One sentence on each, with the fact that backs it up. More supporting information only if asked.

THE CLOSE
"So I'm asking you to approve the move today, so that we can start the first region next quarter. Are you happy to approve it?"

Worked example: the same proposal at four lengths

Your slide pack doesn't change. With less time, you show fewer slides and say less, but you always start and finish with the decision you want.

20 minutes
Your full time

5 minutes
Cut short

2 minutes
A short slot

30 seconds
In the corridor

How coaching and mentoring can help ↓

1 2 3 4 5 6 7

"I'm asking the committee to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m. Finance has validated the figures."

Savings: "£9.6m a year, about 8%, paying back in about three months." Then the tender results, and how Finance checked them.

Quality: "One specification worldwide. We expect line stoppages and complaints both to halve." Then the stoppage and complaint figures by site.

Innovation: "Each supplier committed in the tender to cut pack weight by 10% within two years, and then to ongoing design and efficiency improvements. That means less material and less waste, on top of the £9.6m." If challenged: the commitments suppliers made in the tender.

Slides 5 to 7: the options compared, the risks and how you'll manage them, and the plan.

"So I'm asking you to approve the move today, so we can start the first region next quarter. Are you happy to approve it?" Then questions.

1 2 3 4

"I'm asking the committee to approve a move to two suppliers in each region for paper packaging, with a one-off cost of £2.4m."

Savings: "£9.6m a year, validated by Finance."

Quality: "Fewer line stoppages; complaints halved."

Innovation: "10% lighter packs within two years, then ongoing design and efficiency improvements."

"Approve today, and we start next quarter. Are you happy to approve it?"

1

"I'm asking you to approve two suppliers per region, for £2.4m once."

"It saves £9.6m a year, cuts line stoppages and complaints, and brings lighter packs with ongoing design improvements."

"Can I have your decision?"

No slides

"£2.4m once, to save £9.6m a year. Can I have your decision?"

Same order at every length: the decision you want, the reasons, the close. With less time you say less, and slides 5 to 7 stay in your pack, ready if someone asks. The words shown are a guide, not exact timings.

If you have 20 minutes, where to spend them

Don't fill the time with talking. Present for about 12 minutes, and leave the rest for their questions: that's where the decision gets made.

1	7 · Your three reasons	3 · Options and risks	1	8 · Their questions

1 min The decision you want

7 min Three reasons. Spend longest on the one the key people care most about (step 2), or the one most likely to be challenged (step 5).

3 min The options you looked at, the risks and how you'll manage them

1 min The plan and the close

8 min Questions and discussion. If there are none, ask for the decision.

Source: common practice; no single author. The split is a guide, not a rule.

How to use it

1. Take the slide pack from Tool B. For each slide, write the one or two sentences you'll say with it.
2. Link each reason to what your audience cares about (from step 2). Bring out the supporting information only if asked.
3. Write your opening and close word for word. Script the middle too, then rehearse it until you can say it naturally, without reading it out.
4. End with a question that asks for the decision. Then stop talking, and let the chair answer.
5. Practise the 30-second version out loud. If that works, the longer ones will too.

More than three reasons? Pick the three that matter most to your committee. Here, lower internal cost of managing 38 suppliers is a fourth benefit. It stays in the appendix, ready if asked.

Only claim what's on the table now. Savings are in the tender prices, and the lighter-pack and ongoing improvement commitments are in the tender terms. Further benefits innovation might bring are not confirmed yet, so say only what's in place (each supplier committed to 10% lighter packs within two years, then ongoing design and efficiency improvements) and keep supporting information ready if challenged: the commitments suppliers made in the tender.

Why three? We can hold only about four things in mind at once (Cowan, 2001), so three reasons stick and ten don't.

Start at the top, finish at the top. People remember best what they hear first and last, so say what you're asking for in both places.

Silence is fine. After you ask, the pause can feel long. Don't fill it with more detail: that reopens the debate.

Sources: Barbara Minto, *The Pyramid Principle*; Nelson Cowan (2001) on working memory; the serial position effect (first and last remembered best). The one-page template is from the "Impress Your Board" workshop. All figures are fictional.

How coaching and mentoring can help

- An independent, experienced review of your paper and pitch, with questions rather than rewrites.
- Leave with the one sentence your committee most needs to hear first.
- Practise your full pitch, at any length, with an experienced listener who asks the questions your committee is likely to ask.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

← Back to the map

How coaching and mentoring can help ↓

1 Map your approval route
2 Know who matters
3 Condition the key people
4 Write the paper and prepare your pitch
5 Check your supporting information and test it
6 Get the decision and follow it through

BOARD PROPOSAL TOOLKIT · STEP 5 OF 6 · 2 WEEKS OUT

Check your supporting information and test it

Short at the top, solid underneath. You will already have gathered the detailed information that led you to your conclusions and your proposal. Now check that every claim in your paper is supported by it, ready if you're challenged in the meeting or to send afterwards. Then test your full draft out loud with someone who will ask the hard questions.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

Paper deadline: two weeks before the Investment Committee. A dry run is booked with a colleague the week before.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS

A check of your supporting information, a list of the hard questions, and a dry run with honest feedback.

WHAT IT'S FOR

So your numbers stand up and you've practised your answers to the questions they're likely to ask, including the ones you hope they won't.

WHAT YOU GAIN

You walk in confident, with answers ready, and know how you come across.

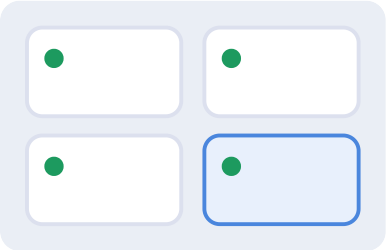
IF YOU SKIP IT

One weak number or unexpected question can undermine the whole proposal. And you don't know how you'll come across, because you haven't done it yet.

Short of time? Have Finance check your key numbers, and practise your answers to the three hardest questions out loud.

A

Can they pull it apart?



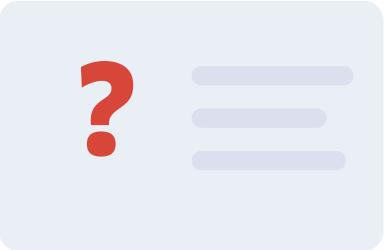
Tool A · Supporting information checklist

Grouped by the questions a committee asks, starting with your baseline.

Open the checklist →

B

What will they ask?



Tool B · Hard questions

The questions they're likely to ask, including the ones you hope they won't, person by person, with your answer ready.

Open the questions →

C

How did it come across?

Tool C · Dry run with a colleague

The words, the music and the dance, and coaching-style feedback.

Open the dry run →

Ask yourself first

"What's the one question I'm hoping they won't ask?"

That's the one to prepare first. Then ask your colleague the same question about you after the dry run: what did they notice that you didn't?

- **What would a sceptical CFO look for first?**
- **What did I notice about myself in the dry run?**

WHAT YOU WALK AWAY WITH

An appendix that holds up, answers ready, and a pitch you've said out loud

- Supporting information complete
- Hard questions answered
- One thing to change after the dry run

How coaching and mentoring can help

- A dry run with someone senior and independent, who asks the questions your committee is likely to ask, and the ones colleagues might not.
- Questions that help you find the gaps in your case for yourself, before the committee does.
- Honest, confidential feedback on the words, the music and the dance, and one thing to change.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL A · CAN THEY PULL IT APART?

Supporting information checklist

You won't present most of this. Use it to check that there is something to support every claim in your draft paper. It sits in the appendix, or ready to send, so that anyone who digs in reaches the same answer as you. Tick what you already have from the project; the gaps are your work for this week. Ticks show the fictional example.

WHAT IT IS
A checklist of the supporting information the committee will look for, starting with the baseline.

WHAT IT'S FOR
To make sure your numbers stand up, and that Finance has checked them.

WHAT YOU GAIN
Confidence that nobody can pull your case apart on the day.

IF YOU SKIP IT
One weak number undermines the whole proposal, and the decision is put off.

Where are we now, and what's the trend? (the baseline)

- ☑ Supplier performance: quality, on-time delivery, line stoppages from packaging faults, and complaints
- ☑ Price trends over 3 years
- ☑ Current level of supplier innovation
- ☑ Internal cost of managing 38 suppliers (people, orders, invoices, audits)
- ☑ Requirements and specification review: what the business really needs, and why 38 specifications
- ☑ Demand and volume forecast by region

Is it worth it?

- ☑ Spend analysis
- ☐ Should-cost model: fibre, energy and conversion costs
- ☑ Business case: payback and NPV
- ☑ Savings validated by Finance
- ☐ Cash flow forecast and budget phasing
- ☑ Total cost of ownership
- ☐ Sensitivity analysis (e.g. fibre prices up 20%)

Why this option?

- ☑ Category positioning (Kraljic matrix): is packaging leverage or strategic?
- ☑ Options appraisal and weighted scoring
- ☑ Do-nothing case
- ☑ Tender results and bid evaluation
- ☑ Lighter-pack commitments suppliers made in the tender
- ☐ External benchmarks

Can the market deliver?

- ☑ Supply market analysis (e.g. Porter's Five Forces)
- ☑ Supplier financial health checks
- ☑ Site visits and audits

Are we protected?

- ☑ Risk register
- ☑ Transition and continuity plan
- ☑ Key contract terms agreed in the tender: exit costs, index clauses
- ☐ Legal review

Will it actually happen?

- ☑ Implementation plan and milestones
- ☐ Benefits delivery, by quarter
- ☐ KPIs after approval
- ☐ Change and communications plan

Does the business support it?

- ☑ Stakeholder interviews
- ☐ Sign-offs: Quality, Manufacturing, Finance, Legal

Is it responsible?

- ☑ Certified fibre sources
- ☐ Carbon impact
- ☑ Supplier code of conduct and modern slavery checks

Can we get the best deal?

- ☑ Negotiation plan, with a walk-away position
- ☐ Supplier preferencing

How to use it

1. Start with the baseline. It proves what has changed, and shows the proposal will be at least as good as what you have now, for example on quality and delivery, not just cheaper.
2. Under each question, tick what you already have. You won't need every item for every proposal. Pick what your committee will expect.
3. For each gap, decide: gather it now, or say when you'll have it. Gather it now if it could change the decision, such as cash flow or a sensitivity analysis. If it's about delivery after approval, such as KPIs or a communications plan, be ready to say when it will follow.
4. Link each of your three reasons from step 4 to the information that supports it.
5. Fill the gaps this week. Finance sign-off usually takes longest.

Your procurement tools are the foundations. Spend analysis, market analysis, risk registers and negotiation plans are the reasons nobody can pull the argument apart.

Source: a checklist of standard procurement and business case analyses, grouped by the questions committees typically ask. No single author. Category positioning: Peter Kraljic, "Purchasing must become supply management" (1983). Supply market analysis: Michael Porter's Five Forces (1979). The ticks show the fictional example.

How coaching and mentoring can help

- A dry run with someone senior and independent, who asks the questions your committee is likely to ask, and the ones colleagues might not.
- Questions that help you find the gaps in your case for yourself, before the committee does.
- Honest, confidential feedback on the words, the music and the dance, and one thing to change.

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL B · WHAT WILL THEY ASK?

Hard questions

Read your draft paper as the committee will. Take the questions it raises, add the "question they'll ask" column from step 2 and the ones you hope nobody asks, and the ones you'd welcome. Prepare a short answer for each, with what supports it. Answer in terms of what they care about.

WHAT IT IS
A list of the hardest questions you could be asked, with your answers.

WHAT IT'S FOR
To practise your answers to every question they're likely to ask: the ones you'd welcome, and the ones you hope they won't.

WHAT YOU GAIN
Calm, short answers ready, including when the honest answer is "I don't know yet".

IF YOU SKIP IT
A question you hadn't thought of throws you, and the room loses confidence in you.

CFO	*"How sure are the savings?"*	"They're based on binding tender prices, not estimates, and Finance has validated them. The only variable is fibre cost, and the contracts include an index to share that risk fairly."
Operations Director	*"What if the switch disrupts production?"*	"We move site by site, with six weeks of overlapping stock, and your two largest sites go last."
CEO	*"What other options did you consider?"*	"We looked at three alternatives: staying as we are, one global supplier, and changing Europe only. Against what matters most to you, which is savings, quality and innovation, this option came out best on all three. I'm happy to take you through the scoring."
Regional GM, Asia Pacific	*"Why not one global supplier? Surely that's cheaper."*	"We tested it. Packaging is bulky and costly to ship far, so the market is regional. No supplier is strong in every region, and one supplier would concentrate our risk."
Anyone	*"I don't know" moments*	"I don't have that figure with me. I'll send it to you by Friday." Then do. It builds more trust than a guess.

How to find your own

1. **By person:** the CFO asks about payback, cash and certainty. The CEO asks about strategy and reputation. Operations asks about continuity. Legal and risk ask about contracts and compliance.
2. **By situation:** a new supplier, a bigger spend than last year, a past failure, or awkward timing in the budget cycle all bring their own questions.
3. Write the question in their words, and keep the answer to two sentences, with the supporting information ready.
4. Script every answer. For the two or three questions most likely to come up, also have a back-up slide ready in your appendix, such as the options scoring. Show it only if asked.

Leave some detail out on purpose. If you know "What other options did you consider?" is coming, let them ask it. A confident, prepared answer works better than a slide they skim past.

Your hard questions

A full-page blank is at the back of this toolkit (page 61). Print it and fill it in by hand, or copy it into your own document.

Source: preparing answers to likely objections is common practice in presenting and negotiation, with no single author. All people and answers here are fictional.

How coaching and mentoring can help

- A dry run with someone senior and independent, who asks the questions your committee is likely to ask, and the ones colleagues might not.
- Questions that help you find the gaps in your case for yourself, before the committee does.
- Honest, confidential feedback on the words, the music and the dance, and one thing to change.

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TOOL C · HOW DID IT COME ACROSS?

Dry run with a colleague

Test your full draft with a colleague, then refine it. Ask them to play the chair, or the person you most need to convince. Give the 5-minute version, then the 2-minute one. Your colleague notices three things, then gives feedback the coaching way.

WHAT IT IS
A practice run of your pitch with a colleague, with structured, honest feedback.

WHAT IT'S FOR
To find out how you come across: the words, the music and the dance.

WHAT YOU GAIN
You fix what isn't working before it matters, and walk in confident.

IF YOU SKIP IT
You find out how it comes across in the real meeting, when it's too late to change it.

The words
What they hear. Is the answer first? Are the reasons clear? Is it clear what decision they want? Is anything missing, or being avoided?

The music
How it sounds. Pace, energy, pauses, conviction.

The dance
What they see. Posture, eye contact, gestures.

And how it all fits together
Do the words, the music and the dance match? If something feels out of step, your intuition will often pick it up first, and that can be the most useful thing to share.

Feedback, the coaching way

1. The colleague shares: **"I think it would be even better if..."**
2. Then: **"What worked really well was..."**
3. Then asks, rather than tells: **"What one thing will you do differently next time?"**

The presenter decides the one thing. People commit to what they work out for themselves far more than to what they're told.

Why a colleague sees more. We all have blind spots: things others notice about us that we don't. A dry run is a safe place to find them before the committee does.

Run it at your full length, then at 5 minutes. If the 5-minute version still makes clear what you're asking for, with the three reasons, you're ready if your slot is cut on the day.

Sources: the blind spot comes from the Johari window (Joseph Luft and Harrington Ingham, 1955). "The words, the music and the dance" is a common way of describing verbal, vocal and visual communication. The feedback sequence is the one used in the "Impress Your Board" workshop.

How coaching and mentoring can help

- A dry run with someone senior and independent, who asks the questions your committee is likely to ask, and the ones colleagues might not.
- Questions that help you find the gaps in your case for yourself, before the committee does.
- Honest, confidential feedback on the words, the music and the dance, and one thing to change.

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BOARD PROPOSAL TOOLKIT · STEP 6 OF 6 · THE DAY, AND AFTER

Get the decision and follow it through

Know in advance what you'll say whichever way the meeting goes, and have your supporting information ready if you're challenged. Then make the decision stick: get it on the record, send what you promised, and thank the people who helped.

FICTIONAL WORKED EXAMPLE

Paper packaging: 38 suppliers down to 8

Investment Committee, 15 minutes on the agenda, running late. Approved, on condition that the two largest sites move last.

£120m	£2.4m	~8%
annual spend	one-off investment	saving a year

WHAT IT IS
A plan for the meeting itself, and a short set of follow-ups in the days after it.

WHAT IT'S FOR
So you leave with a clear decision, and it sticks.

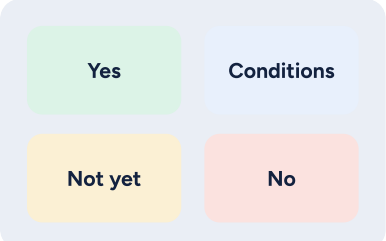
WHAT YOU GAIN
You stay calm whatever they say, the decision is on the record, and people are glad to support you next time.

IF YOU SKIP IT
The meeting ends warmly but without a decision, or the decision is quietly reopened later.

Short of time? Decide what you'll say if they say "not yet". Afterwards, send a confirmation email within 24 hours, with anything you promised.

A

What if they don't say yes?



Tool A · Plan for yes, not yet or no

A prepared response for each outcome, and the supporting information you'll go to if challenged.

Open the plan →

B

Is it on the record?

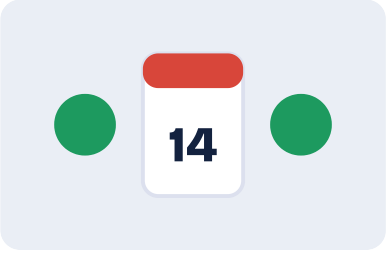
Tool B · Get it minuted and confirmed in writing

The minute you'd like recorded, then a short confirmation email within 24 hours.

Open →

C

What happens next?



Tool C · Follow through

Send what you promised, turn "not yet" into a date, and thank the people who helped.

Open →

Ask yourself first

“If they say "not yet", what's my fallback, and what would I need to bring back?”

Decide it before you walk in, so you're never caught without a response.

- **Which piece of supporting information will I go to if I'm challenged?**
- **What would make this decision easy to reopen, and how do I close that gap?**
- **Who should hear the result from me first?**



WHAT YOU WALK AWAY WITH

A clear decision, on the record, and supporters ready for next time

- Decision minuted and confirmed
- Promises kept, supporters thanked
- Owner and date for what's next

How coaching and mentoring can help

- Rehearse your answer to "not yet" and "no" with someone senior and independent, until it feels natural.
- Develop a plan for each outcome together, and draft your follow-up responses.
- A debrief afterwards: what worked well, and what you could do differently next time.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL A · WHAT IF THEY DON'T SAY YES?

Plan for yes, not yet or no

Plan your response to the different ways the meeting could go, so you're ready whatever they decide.

WHAT IT IS
A plan for each outcome: yes, yes with conditions, not yet, and no.

WHAT IT'S FOR
To decide your response before you walk in, so you're ready whatever they decide.

WHAT YOU GAIN
You stay calm whatever they say, and leave with a clear next step.

IF YOU SKIP IT
A "not yet" catches you off guard, and you leave without knowing what to bring back.

How to fill it in

What you'll say: the words you use in the room, straight after the decision.

Your fallback: a smaller yes you'd accept if they won't agree to everything. For example, one region first, a pilot, or spending in stages. Decide your minimum before you walk in.

Your next step: what you do straight after the meeting, who does it, and by when.

WORKED EXAMPLE

Yes

WHAT YOU'LL SAY

"Thank you. We'll start with Europe in the first quarter, and report back to this committee in six months."

YOUR NEXT STEP

Send the confirmation email within 24 hours (Tool B). Start the Europe plan with Operations this week.

Yes, with conditions

WHAT YOU'LL SAY

"So that's approved, provided the two largest sites move last."

YOUR NEXT STEP

Agree with the Operations Director how you'll show the condition is met. Share the site-by-site plan by the end of the month.

Not yet

WHAT YOU'LL SAY

"What would you need to see to say yes, and when can I bring it back?"

YOUR FALLBACK

"Would it help if we started in Europe only, and came back with results in six months?"

YOUR NEXT STEP

Agree the date you'll return (Tool C).

No

WHAT YOU'LL SAY

"Thank you. So I understand: is it the investment, the timing or the risk?"

YOUR NEXT STEP

Meet the CFO one to one within two weeks to understand the concern. Then decide whether to revise and return, or stop.

If you're challenged, go to your supporting information. The checks you did in step 5 are your back-up. Answer in two sentences, point to the supporting information, and offer to send the detail afterwards: "I'll send you the scoring by Friday." Then do it (Tool C).

Your scenario plan

A full-page blank is at the back of this toolkit (page 62). Print it and fill it in by hand, or copy it into your own document.

Source: scenario planning for meeting outcomes is common practice in negotiation and stakeholder management, with no single author. All examples are fictional.

How coaching and mentoring can help

- Rehearse your answer to 'not yet' and 'no' with someone senior and independent, until it feels natural.
- Test your plan for each outcome: what you'll say, what you'll offer, and what you won't give away.
- Describe the reaction you're most concerned about, and practise staying calm and clear when it comes.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL B · IS IT ON THE RECORD?

Get it minuted and confirmed in writing

A decision that isn't recorded clearly can be reopened. Offer the secretary the exact wording before the meeting, check the minutes afterwards, and send a short confirmation email within 24 hours.

WHAT IT IS
The minute you'd like recorded, and a short email confirming the decision, conditions and next steps.

WHAT IT'S FOR
To make sure the decision is on the record, exactly as it was made.

WHAT YOU GAIN
A decision nobody can misremember or reopen by mistake.

IF YOU SKIP IT
People remember the meeting differently, and the decision is questioned later.

EXAMPLE: A YES WITH ONE CONDITION

> **Suggested minute:** "The committee approved the move to two suppliers per region for paper packaging, with a one-off cost of £2.4m and annual savings of about £9.6m, as validated by Finance. The transition will run site by site over 12 months, starting with Europe, provided the two largest sites move last. Progress to be reported to the committee in six months. Owner: Head of Category, Packaging."

How to use it

1. Draft the minute you want, in one paragraph: the decision, the money, any conditions, the owner and the report-back date.
2. Send it to the secretary with your paper: "In case it's helpful for the minutes."
3. After the meeting, check the draft minutes match what was agreed. Raise any difference straight away.

Conditions count. If the yes came with conditions, make sure they're minuted exactly, so nobody can add new ones later.

Then, within 24 hours: the confirmation email

To: everyone who attended: the chair (CEO) and all committee members · **Copy:** the committee secretary, your manager (CPO)
Subject: Paper packaging: confirming today's decision

Thank you for your time at today's Investment Committee. To confirm what was agreed:

- **Decision:** approved the move to two suppliers per region, with a one-off cost of £2.4m.
- **Condition:** the two largest sites move last.
- **Next steps:** Europe starts in the first quarter. I'll share the site-by-site plan with Operations by 31 January. As agreed, Operations will name a lead for each site by 15 January.
- **Report back:** progress to the committee in six months.

Please let me know if I've missed anything.

How to use the email

1. Send it the same day if you can, and within 24 hours at the latest, to everyone who attended. They decided together, so they all get the same message. Copy the secretary and your manager.
2. Use the same words as the minute, so the two match.
3. For every next step, say who will do it and by when, including anything others agreed to do. For example: "I'll share the site-by-site plan with Operations by 31 January" and "As agreed, Operations will name a lead for each site by 15 January." Then put the date you report back to the committee in your diary.

If it wasn't a straight yes

Still get it minuted and confirmed. These are the outcomes most often misremembered, so they matter most.

> **Yes, with conditions**
>
> Record each condition exactly, and how and when you'll show it's been met. Nobody can add new conditions later.

> **Not yet**
>
> Record exactly what they asked for, who will provide it, and the date it comes back. Without that, "not yet" can quietly become "no". Then follow it through (Tool C).
>
> *"The committee asked for the site-by-site scoring and will reconsider on 14 March."*

> **No**
>
> Record the decision and the reason given, in their words. Thank them, and ask one to one what, if anything, would change their view. Don't argue the case again in the email.
>
> *"The committee did not approve the proposal at this time, because of the timing of the investment."*

Source: common committee and business practice, with no single author. The wording and people are fictional.

How coaching and mentoring can help

- Check your minute and email with someone independent before you send them, so nothing is left open.
- Find the right tone for a 'not yet' or 'no': factual, positive, and never defensive.
- Plan what to say if the minute doesn't match what was agreed.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

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Fictional example. The company, committee, people and numbers are made up to show how the tools work. No real suppliers are named.

TOOL C · WHAT HAPPENS NEXT?

Follow through

The meeting isn't the end. Send what you promised, turn a "not yet" into a date, and thank the people who helped. They're the people you'll need next time.

WHAT IT IS	WHAT IT'S FOR	WHAT YOU GAIN	IF YOU SKIP IT
Three follow-ups in the days after the meeting.	To keep your word, keep momentum, and keep your supporters on side.	Trust that carries into delivery, and into your next proposal.	A promise slips, "not yet" quietly becomes "no", and supporters feel taken for granted.

1. Send what you promised

- If they asked for something, such as the options scoring, send it within 2 working days.
- Keep it short: the answer first, with the detail attached.

Suggested email

"As promised at Tuesday's committee, here is the options scoring. In short, two suppliers per region scored highest on savings, quality and innovation. The full scoring is attached. I'm happy to talk it through."

2. If it was "not yet", turn it into a date

1. FIND OUT EXACTLY WHAT'S NEEDED
"What would you need to see to be comfortable saying yes?"

2. OFFER TO TAKE THEM THROUGH THE DETAIL
"Would it help if I took the CFO through the scoring this week, and we bring it back on 14 March?"

3. CONFIRM THE DATE IN WRITING
"As agreed, I'll meet the CFO on Thursday, and the paper returns to the committee on 14 March."

"Not yet" isn't "no". Within 24 hours, write down exactly what was asked for, and by whom. Meet the person who held it back one to one, as you did before the meeting (step 3 of this toolkit: Condition the key people). Then find the date of the next committee and plan back from it (step 1: Map your approval route). If the detail reaches the same conclusion, the person who looks into it often becomes your strongest supporter.

3. Thank the people who helped

How to fill it in

Who: everyone who helped you reach the decision: people who opened doors, checked your figures, spoke up for it in the room, or gave you advice. Include people more junior than you, not only senior ones.

What they did: one specific line. "Validated the savings in time for the deadline" means more than "helped".

How you'll thank them: suit it to the person. In person or a short note for most people. For someone more junior, also tell their manager what difference they made.

When: as quickly as you can, and no longer than a week after the decision.

People who are thanked are about twice as likely to help again (Grant and Gino, 2010). A thank-you given close to the moment carries more weight.

Example note: *"Thank you for checking the savings figures so quickly. It meant the committee could decide on the day, and that made a real difference."*

WORKED EXAMPLE

Who	What they did	How you'll thank them
Your manager (CPO)	Conditioned the Operations Director, peer to peer	In person, and tell their manager what difference it made
Head of Finance	Validated the savings in time for the deadline	A short email, copying the CFO
Category lead, Asia Pacific	Opened the door to the Regional GM	Credit them in the team update
Quality Director	Spoke up for the single specification	A quick note, and keep them updated
Committee secretary	Told you the real deadline and the template	A thank-you, and share the final minute

Your thank-you list

A full-page blank is at the back of this toolkit (page 63). Print it and fill it in by hand, or copy it into your own document.

Source: common practice in stakeholder management, with no single author. All people, dates and details here are fictional. Being thanked: Adam Grant and Francesca Gino, "A little thanks goes a long way" (2010).

How coaching and mentoring can help

- After a 'not yet' or 'no', talk through what was really behind it, and what to do next.
- Prepare for the one-to-one with the person who held it back, so it builds support.
- A debrief afterwards: what worked well, and what you could do differently next time.

Independent, confidential and experienced. Consider whether talking it through would help. Simon Barnes Coaching · simonbarnescoaching.com

Step 1 · Tool A · Your route map

List every level that has to say yes, from the bottom up. Mark each one's role: **endorses**, **decides** or **for noting**.

Level	Group or committee	Role	Meeting date	Paper due	Done
1					
2					
3					
4					
5					
6					
7					
8					

Is there a step that isn't written down, such as a pre-meeting with the CFO?
_____

Step 1 · Tool B · Your governance checklist

For each level on your route, fill in what it needs from you.

Check	Level 1	Level 2	Level 3
Role			
Meeting date			
Paper deadline			
Decision, discussion or noting?			
Who chairs			
Who really decides			
Who could overrule or delay			
Required format			
Sign-offs needed first			
Time you'll get			

Step 1 · Tool C · Your backwards countdown

Put the deciding meeting at week 0 and work back. Timings are typical; adjust them to your own approval cycle.

When	What happens	Your date
Week −8	Map the route; talk to the secretary	
Week −7	Map the people	
Weeks −6 to −4	One-to-ones; earlier levels	
Week −3	Draft the paper; sign-offs start	
Week −2	Paper deadline; dry run	
Week 0	The deciding meeting	
Within 24 hours	Confirm in writing	

Step 2 · Tool B · Your stakeholder engagement grid

One row for each key person. Where they stand: for, neutral or against.

Person	What they care about	Where they stand now	Where you need them	The question they'll ask	How you'll move them	Best person to approach them

Step 3 · Tool A · Your conversation plan

Plan each one-to-one. Open with a question, then share your view.

Person	Outcome you want	Open by asking	Likely challenge	Your response	The next step you'll ask for

Step 3 · Tool B · Your messenger plan

For each key person, who is best placed to carry your message?

Key person	Who they listen to and trust	Your messenger	The one message	When

Step 3 · Tool C · Your no-surprises tracker

Keep track of what each person said, what you changed, and whether you told them.

Person	Status	What they said	What you changed	Told them?

Step 4 · Tool A · Your page 1

Your committee · For decision. Lead with the decision you want, then the situation, the target and your proposal.

OUTCOME EXPECTED

SITUATION

TARGET

PROPOSAL

Step 5 · Tool B · Your hard questions

Write each question in the words the person would use. Answer it in two sentences.

Who asks	The question, in their words	Your answer (two sentences)	What supports it

Step 6 · Tool A · Your scenario plan

Plan what you will say for each outcome, before the meeting.

Outcome	What you'll say	Your fallback or next step
Yes		
Yes, with conditions		
Not yet		
No		

Step 6 · Tool C · Your thank-you list

Thank the people who helped, within a week.

Who	What they did	How you'll thank them

Impress your Board

Telling your story so the C-suite says yes

CXO Level Storytelling and Communication Workshop · Your one-page pitch. Fill it in from the top. Say it from the top.

Free toolkit

YOUR BRIEF TO YOUR PARTNER: WHO THEY PLAY, AND WHO ELSE IS THERE

Who decides

Name and role

Who else is in the room

And what they care about

1 Outcome expected: your answer

"I'm asking you to approve / agree ..."

2 Situation: what's changed and why it matters now

One or two sentences

3 Three reasons they should say yes

"We looked at __ options. This one is best because..." Put the reason that matters most to them first.

Reason	Why it beats the alternatives (one fact or number)
1.	
2.	
3.	

4 The decision you need today

"Can I have your approval to ... ?"

If not a yes today: *what would they need to see, and by when?*

Supporting information beneath, only if asked

Proof it's at least as good as today on everything else (quality, delivery, risk), and better where it counts. Analysis, options, plan: in the appendix, ready.

The question you hope they won't ask

And your answer

If your time is cut on the day: 5 minutes: your answer plus three reasons · 2 minutes: your answer plus the decision you need · 30 seconds: the answer alone. **Start at the top. Finish at the top.**

Card A: for the listener

Impress your Board · CXO Level Storytelling and Communication Workshop

Why it's different: often we tell: "That sounded good. What I thought was…" Here we ask first, giving someone the opportunity to work it out for themselves. Then we offer our own view, to add what they may not have noticed in themselves.

Stay in role. Notice **the words** (what you hear), **the music** (how it sounds) and **the dance** (what you see), and what your intuition tells you. Then pick three questions, ideally one from each. For each: ask, listen, then share how it came across to you.

The words *(what you hear)*

1 **THE ANSWER** "What do you think I'll remember from that?"
Then: "What I remember is…"

2 **THE OPTIONS** "Why do you think this option beats the others?"
Then: "What I'd still want to know is…"

The music *(how it sounds)*

3 **VOICE AND PACE** "How did your voice sound to you: pace, energy, pauses?"
Then: "What I heard was…"

4 **CONVICTION** "Where did you sound most confident, and where least?"
Then: "Where you sounded most convincing to me was…"

The dance *(what you see)*

5 **PRESENCE** "How do you think you looked from my seat?"
Then: "What I saw was…"

6 **EYE CONTACT** "How comfortable were you holding eye contact?"
Then: "From where I sat…"

Then share, from your seat: "I think it would be even better if…" and "What worked really well was…"
To finish, ask: "What one thing will you do differently next time?" Let them commit to it.

Ask first, then share. Let them find the sharper version.

Card B: for the listener

Impress your Board · CXO Level Storytelling and Communication Workshop

Why it's different: often we tell: "That sounded good. What I thought was…" Here we ask first, giving someone the opportunity to work it out for themselves. Then we offer our own view, to add what they may not have noticed in themselves.

Stay in role. Notice **the words** (what you hear), **the music** (how it sounds) and **the dance** (what you see), and what your intuition tells you. Then pick three questions, ideally one from each. For each: ask, listen, then share how it came across to you.

The words *(what you hear)*

1 **THE ANSWER** "If I summed up your proposal in one sentence, what would you hope I'd say?"
Then: "My sentence would be…"

2 **CLARITY OF THE CASE** "How easy do you think your reasons were to follow?"
Then: "What I followed easily, and where I lost the thread, was…"

The music *(how it sounds)*

3 **CONFIDENCE** "How confident did you feel?"
Then: "How confident you sounded to me was…"

4 **ENERGY** "Which moment do you think had the most energy?"
Then: "The moment that stood out for me was…"

The dance *(what you see)*

5 **BODY LANGUAGE** "What do you think your body language said about your belief in your proposal?"
Then: "What it said to me was…"

6 **ASKING FOR THE DECISION** "What were you doing with your hands and eyes when you asked for the decision?"
Then: "What I noticed was…"

Then share, from your seat: "I think it would be even better if…" and "What worked really well was…"
To finish, ask: "What one thing will you do differently next time?" Let them commit to it.

Ask first, then share. Let them find the sharper version.

Card C: for the observer

Why it's different: often we tell: "That sounded good. What I thought was…" Here we ask first, giving someone the opportunity to work it out for themselves. Then we offer our own view, to add what they may not have noticed in themselves.

Watch both pitches. Note what you hear, what you see, and what your intuition tells you.

The words *(what you hear)*

Was the answer first? Were the reasons clear and easy to follow? Was it clear what they were asking for? Was anything missing, or avoided?

The music *(how it sounds)*

Pace, energy, pauses, confidence in the voice.

The dance *(what you see)*

Posture, eye contact, gestures.

After the listener has finished, share: **"I think it would be even better if…"** and **"What worked really well was…"**

Ask first, then share. Let them find the sharper version.

Sources

Each tool credits its source on its own page. In full:

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- 'The words, the music and the dance': a metaphor for verbal, vocal and visual communication. Common practice (no known author). Step 5, Tool C and the question cards.
- The serial position effect (first and last items remembered best). Step 4.
- Common practice with no single author: delegated authority and committee practice, backward planning, stakeholder and influence mapping, negotiation planning, trusted messengers, "no surprises", scenario planning, minutes and written confirmation, and "what worked well" and "even better if" feedback. Recognition works best close to the action; "within a week" is this toolkit's own guidance.

All worked examples are fictional.