

## ***Seven Actions for Becoming an Effective Communicator***

### ***Action 7: Fighting for Feedback, Coordination and Getting Approval***

#### **PRACTICE OBJECTIVE**

This practice covers:

- Informal feedback—how to get it, how to give it.
- Staff coordination—the players.
- Staff coordination—the process.

Fighting for feedback and getting approval for your communication are activities that are part of life in an IT organization. When you fight for feedback, you voluntarily seek out someone else's views on your speaking or writing product. Feedback can be very informal and it doesn't have to be from people with impressive job titles. When you get staff approval, you're going through a more formal process that allows individuals to review and comment on your communication product. Feedback and coordination are closely linked: if you do a good job at fighting for feedback, you'll find that the coordination process becomes much smoother.

#### **PRACTICE WORKBENCH**

All of the preceding actions have led up to this final and most important action. The workbench for feedback, coordination and approval is a three step process. The first two steps focus on building the support necessary to get approval for the idea. In most organizations, if you build the appropriate support from those individuals who have a vested interest in the success of what you are trying to accomplish, you will get approval. The workbench emphasizes that once you are comfortable with a draft of your communication you still need to get feedback and coordination. Feedback is having other people review and comment on your edited draft. There are two objectives from feedback. The first objective is to make sure that your edited draft makes sense, properly identifies and supports the objective, and indicates the action needed to implement your idea. The second, and equally important, is to gain support from individuals for your proposal by having participated in the final development of the communication that you are preparing.

The coordination step has a primary objective of building support for your proposal from all of the organizations that have a vested interest in the success or failure of your proposal. Coordinating with those

who oppose your proposal is equally important as coordinating with those you believe will support your proposal. For those who may not support your proposal you are trying to either win them over to accept your proposal, or to let you go forward with your proposal without their objections to the proposal.

#### **INPUT PRODUCTS**

The major input product to this action is the edited draft of your communication vehicle which is the output from Action 6. However, in addition to the edited draft two other inputs are needed. The first is those individuals or groups that you either need feedback from or need to coordinate with to ensure you have the best possible communication draft and that you have built the necessary support for the approval step.

The second input is identifying those whom will approve or disapprove your proposal. Depending on the magnitude of the proposal it may be a single individual or it may be multiple groups needed to sign off and/or fund the proposal.

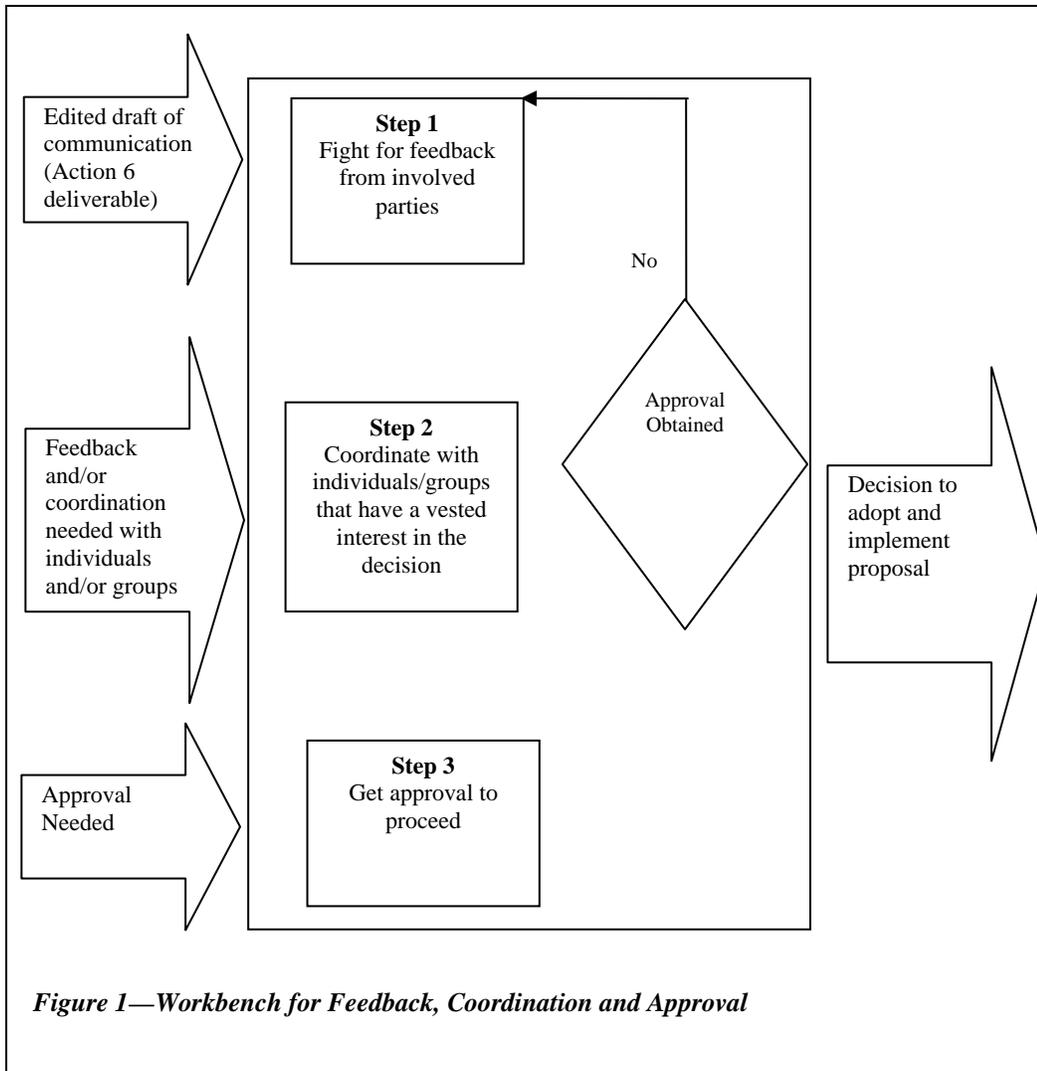
#### **IMPLEMENTATION PROCEDURES**

The implementation of this practice involves the following three steps:

##### **Step 1—Fight for Feedback from Involved Parties**

So, why should you fight for feedback? Perhaps the biggest benefit is getting a second set of eyes to review your work. Even the best writers and speakers can become so close to their projects that they can't see where they can be made stronger. They may omit vital information, fail to see a weakness in their argument or just overlook the need for a transition between two main points. Their closeness to the material and pride of authorship can distort or obscure their viewpoint. Smart communicators realize this tendency and seek objective feedback from a fresh set of eyes. If you seek out and listen to feedback, you are much more likely to produce accurate, understandable communication that resonates with your audience.

Another reason to fight for feedback is that it often saves time during the coordination process. Whether it's the staff package you've been working hard on for 3 weeks or the briefing you have to present Friday,



content from three different “trusted agents” who are strong in those particular areas. You may even want to use a trusted agent who’s totally outside your organization to see if your message makes sense to someone with no clue about the material.

***What Kind of Feedback Should I Ask For?***

Once you’ve picked out your feedback sources, you should let them know what kind of feedback you’re looking for. (We’re not suggesting you say, “Tell me how wonderful this is—I’ve worked so hard on it!”) Unless you give them clear guidance, reviewers may focus on details like spelling, grammar and margins. Though these are important, make it clear that you want feedback on the big picture, too. Here are some examples of

getting feedback from someone else’s point of view will help smooth things out later as the package makes its way up the chain of command. In some cases having someone review and provide feedback can also be a smart political move—if individuals “buy in” early in the process, they may be a source of support later if it becomes necessary to defend the material.

***Where Can I Get Feedback?***

Meaningful feedback can come from many different sources. Coworkers or fellow staffers may be a good choice because of their familiarity with the issue and its jargon. They may have also had to brief or write for the same people on similar issues; if so, they can give you some tips or lessons learned. You may also choose to go to different people for different aspects of your work. For example, you may find it helpful to solicit suggestions for improving grammar, organization and

items you should ask them to address:

*Is my purpose clear and am I properly targeting my audience?* For starters, you want to give your reviewers a sense of your audience and your purpose. Will the audience positively receive the message you intend to convey? Ask them to tell you the bottom line they walked away with after reviewing your material. Was it what you intended?

*Did I address the issue at the right level of detail?* Too many details can obscure your message while too few details can lead to confusion, questions and delays. Ask your reviewers if you’ve addressed the issue(s) without going off target. You could also have them ask you questions on the material. Have you anticipated possible questions? If you don’t feel comfortable answering their questions, you may need to go back and do more research. Along the same lines, reviewers

may help you pinpoint inconsistencies or unclear material that your final audience might find as well.

*Are there other viewpoints I need to consider?* Finally, your reviewer may offer differing viewpoints on the material. If that's the case, ask for clarification on their viewpoint if necessary, but don't argue with them. Instead, ask yourself if their ideas may come up again later. If so, you probably need to address them in your material.

The bottom line to getting feedback is having an open mind and being able to accept criticism. Don't take comments personally, even though they are attacking your work. Accept feedback willingly and use it constructively—it's part of the process of developing a quality product.

### ***How to Give Feedback***

There are certain things to keep in mind when giving feedback. First, effective feedback is consistent, objective and sensitive to the stated purpose. If someone asks you to review a package, make sure you understand what the person wants from your review and stick to it. Second, distinguish between necessary, desirable, and unnecessary changes. A page full of red marks is hard to interpret. Instead, give the author a sense of what really needs to be changed versus generic kinds of suggestions such as change "happy" to "glad." Next, helpful suggestions pinpoint specific problems, such as awkward sentences, grammar, etc. A general statement like "you need to work on your sentence structure" isn't as helpful as underlining specific sentences that need help. Finally, you should concentrate on improving the message's content, not the style or personal preferences of the author (unless the author has asked you specifically to comment on writing style).

### ***Feedback Philosophy***

*Feedback should describe rather than judge.* Authors are more likely to listen and incorporate feedback if it's phrased constructively. Avoid judgmental language—it places people on the defensive. Remember, feedback should be directed at a person's work, not at the person.

*Feedback is both positive and negative.* A balanced description of other people's work takes both strong

and weak points into account. Both types of feedback give useful information to those people who want to change and improve their work.

*Feedback should be specific rather than general.* General statements about other people's work do not indicate the performance elements they may need to change and the elements that may serve as models. Highlight or underline specific items you want to bring to the author's attention, and make annotations or comments in the margins.

*Feedback should consider the needs of both the receiver and the giver of the feedback.* Feedback often reflects the state of mind of the reviewer, not just the quality of the work. If you're seeking feedback from someone else, try to pick an appropriate time to make the request and be realistic about the time required for the review. Similarly, reviewers should make sure they are in the right frame of mind before analyzing the material and offering feedback.

*Feedback should be analyzed to ensure clear communication.* Discuss or clarify any feedback you're not sure of to clear up any misinterpretations. The sender's intended message is not always what the receiver hears.

*Feedback should be solicited rather than imposed (except for the supervisor-subordinate situation).* Feedback is most useful when the receiver asks for it. The receiver is more likely to be receptive to your inputs in that case, as opposed to an attitude of "Who asked you?"

### ***A Word on Supervisor-Subordinate Feedback***

As a supervisor, you need to be tactful and patient, especially when approving and disapproving the communications of subordinates. As a supervisor, you are obligated to help your people improve their work. This obligation may mean helping them to revise or rewrite their communication, especially if they are inexperienced. Whatever your role, tact and patience come more easily to people once they really understand feedback in its broadest context.

## **Step 2—Coordinate with Individuals/Groups That Have a Vested Interest in the Decision**

A formal coordination process gives interested individuals an opportunity to contribute to, and comment on, a communication product. Though most staff coordination involves written products (i.e., “the staff package”), the important briefings can also be subjected to a formal review process. Formal coordination gives affected individuals a chance to comment, and helps ensure the best course of action is presented to the decision maker. Coordination also lets the decision maker know who supported or disagreed with the position stated in the paper and who agreed to take subsequent actions within their areas of responsibility.

Getting a staff package fully coordinated takes a lot of time, diligence, and hard work. The coordination process has to be closely monitored by the communication originator to make sure the package gets seen by everyone who needs to see it and doesn’t get forgotten in someone’s in-box. Here are several considerations that may reduce headaches as you work the package up to the decision maker.

### ***The “Who” of Coordination***

One of the first things you need to decide as you get ready to put the package through the approval process is who needs to see the package.

*Check your organization’s policies on coordination.* In many organizations, policies exist on coordination requirements for routine packages: find out if your product falls in this category. Your boss may have a list of people who need to see the package.

*Check with key contacts in the organization.* Contacts throughout the organization can be very helpful during the staffing process. Fellow staffers, executive officers and secretaries can provide advice on who needs to coordinate on the package, including individuals or agencies that you hadn’t thought of. Also, they can give you perspectives on what the bosses will and won’t accept. As you build and get to know this “underground of expertise,” use it to your advantage.

*Realize that the coordination list may grow with time.* Don’t be surprised if other offices are added as the coordination process occurs. Depending on the

material and which level of staff you’re dealing with you may be unaware of all the offices that need to see the package.

*Is there a person on your coordination list who carries a lot of clout?* When planning your coordination strategy, you should probably determine who the “Heavy” is. Who is the one person that can make or break the package during coordination? Who is the one person who could kill your project with a nonconcur? These people often have strong feelings about how and when they are approached. Some of them may hate a “surprise package” and always want to be the first one to be consulted on an issue. In this case you may want to get early buy-in—which can help ensure that others fall into line. Others may want to see what others have to say about the issue before it ever reaches their desk. Use your contacts to find out who these influential people are, what their preferences are and how they like to be approached.

### ***The “How” of Coordination***

Aside from deciding who needs to coordinate on the package, you have other things to consider prior to releasing the package for coordination.

*Do you want to send out a preview copy?* You may want to send a draft package out early to potential coordinators, especially for issues that are complex or for offices whose inputs are crucial to the package’s success. Doing so allows them time to study the issue and also saves time later during formal coordination. Also, you may want to coordinate by telephone for small packages or for people who are extremely familiar with the issue.

*How are you going to route your copy/copies to the various coordinating offices?* You need to consider how you’re going to send the package around. Will you have only one copy that is routed to all affected offices? This may work for high-level packages that don’t have a lot of offices to go through, but the more offices you add to the coordination list, the longer this process will take. Instead, you may want to “shotgun” out a number of copies of the package so a number of offices can coordinate on the package at the same time. This will speed up the process, but you will have more copies of the package to keep track of and the various offices won’t get to see what each other are saying about the material. You will have to figure out

which way will work better for your particular case. Also, don't forget to determine when the "Heavy" will coordinate on the package.

*Consider the boss and the schedule.* You're not done yet. There are some more things you want to do while preparing to go for coordination. For one, get your boss's blessing before going out-of-office. You want to make sure the boss agrees with what you are saying. You probably want to establish a tentative schedule, based on any deadlines you are up against. If you have a deadline for completion, build a schedule backwards from that point to allow for reviews, changes and recoordination. As part of your schedule planning, check to see if any key personnel coordinating on the package are going to be on leave for extended periods.

*If you're using e-mail to send the package around, consider the following.* Specify who is coordinating, who is getting an informational copy, and who will be approving the package. Consider using "COORD," "INFO," "APPROVE," or other keywords in the subject line. Use clear instructions (i.e., how do you want comments documented and what do you want the offices to do with the package when they're finished with it?) and finally, attach all attachments.

*WAIT! One final check.* Before you hit the SEND button or before you go to make all of those copies to send out, get someone else to review the package to make sure you haven't forgotten something obvious. Do one last check for spelling and grammar errors—don't make others proofread your work.

### ***Following the Package***

Know where the package is at all times. Use secretaries, contacts or automated tracking systems to track the package(s) and follow up, follow up, follow up. Keep the package moving according to your schedule. You want to avoid being a nuisance to higher offices, but at the same time you want to let them know what the situation is so they can help push the package along. As you get the packages back, keep all correspondence and comments and make sure you retrieve all coordination copies before going for signature. Make sure you've incorporated any appropriate suggestions into the final product. You may want to summarize the comments and inputs for the approving authority.

### ***Nonconcurrences***

How do you handle a nonconcur? Generally, you only want to send up packages that have received concurrence from all offices. So, do you change the package or do you just include the nonconcurrency in the final package? That may depend on where the nonconcur is coming from. You probably would concede the point to someone with a lot of clout; otherwise the package is as good as dead. Short of that, what can you do? You may be able to persuade the other party to see your point of view. If that doesn't work, do you give in by making small concessions or make a stand? Before you decide to make a stand, you probably want to think about a couple of things. For one, is the issue THAT important, or can you make a concession? Remember also that with the give and take of staff work, a compromise now may help you later. Choose your battles carefully; however, there comes a time to stand firm when you know you're right. Finally, do you have the full support of your boss? Any unresolved disputes at your level may need to be highlighted for resolution at a higher level.

### ***Starting Over***

Too many substantial changes may require you to start the coordination process all over. You'll have to decide if you've crossed this threshold once you see what kind of inputs you're getting on the package. If you decide to start over, recirculate both the original and changed packages to illustrate the changes you've made and why you've made them.

### ***Finishing Up***

Don't give up. You'll eventually work your way up the chain until you reach the final audience. Remember what we said at the beginning: getting that package fully coordinated takes a lot of time, diligence and hard work. Don't get frustrated. Along the way, you will receive lots of suggested improvements to the package, but remember why you are coordinating this material in the first place—to present the boss with the best course of action and to tell him or her who agreed with it and had inputs to it. So don't be surprised by inputs that keep your message consistent with previous decisions by the boss and other supervisors in your chain of command.

### **Step 3—Get Approval to Proceed**

The process of getting approval can be greatly simplified through spending the time necessary in the feedback and coordination steps. It is extremely helpful in making the approval presentation that you can identify those individuals or groups you have coordinated with that want the proposal approved. This alone may enable you to get approval for your proposal.

The approval step can end in one of three decisions. The first and most desirable decision is approval to proceed and implement your proposal. The second and least desirable is outright rejection for your proposal; and the third decision is a qualified acceptance requiring you to take additional action before final approval is given. For example, you may receive approval if you can get a specific individual to be project leader of your proposal.

An outright rejection of your proposal may or may not be helpful. It is not helpful if the decision maker has firmly decided that your proposal will not be adopted. The rejection can be helpful if the decision maker identifies the reason for rejection. For example, your project may be rejected because there are inadequate funds available to implement the proposal. What this tells you is that if you can obtain funding the project will be approved. For example, the decision maker may not have the money in his/her budget to fund the project, but another part of your organization may be willing to fund the project.

### **CHECK PROCEDURES**

The three steps in this action could, in fact, be three distinct actions. Generally, feedback should be complete before the coordination step commences. The coordination step must be completed before the approval step is initiated. Therefore, the quality control checklist for this action is in three parts—Part 1: Feedback, Part 2: Coordination, and Part 3: Approval.

You should complete the appropriate part of the quality control checklist at the conclusion of each step in this action. The quality control checklist for feedback, coordination and approval of your proposal is listed in Workpaper #1. When completing this workpaper a yes response indicates that this procedure was performed correctly, and a no response indicates

that additional action may be warranted. Each no response should be investigated and resolved before preparing the deliverable.

### **DELIVERABLES**

There are both interim and final deliverables from this action. The interim deliverables include the recommendations for changes by the individuals/groups that are providing you feedback. The interim deliverables also include the recommendations and changes proposed by the groups that you are coordinating your communication with.

The final deliverable from this is an approval, a conditional approval, or a disapproval of your proposal. Depending on which of those three decision actions are made, you may need to do some rework and resubmit your project for approval.

### **USAGE TIPS**

When asked to coordinate on someone else's package, don't put it off. Review it, make your inputs to it and keep it moving. It helps keep your desk clear and the other person may remember your efficiency when he or she gets the package. If you need more time to review the material, ask for an extension. But don't wait until the due date to ask for an extension—be proactive. Finally, ask if there are any nonconcurrences on the package so you can take that into consideration.

As a staffer, you have to remember the big picture. Your job is to get the corporate stamp on the package. You do this by first getting feedback from a few key individuals to make sure your message is loud and clear. Then, you get other offices to approve what you are proposing through the coordination process. Only after the package is fully coordinated can you provide the boss with the best course of action and tell him who is supporting that action.

Proper coordination is the oil that lubricates complex organizations and enables efficient operations. How you view the process and your critical role is crucial. Is coordination just a bureaucratic hassle that you have to endure, or will you meet the challenge head-on by doing a professional, proper job? Your attitude is key to success.

**Workpaper #1 – Quality Control Checklist for the Communication Actions of Feedback, Coordination and Approval**

	<b><u>ITEM</u></b>	<b>RESPONSE (Circle One)</b>		<b>COMMENTS</b>
<b><i>Step 1—Fight for Feedback</i></b>				
1.	Have you developed a list of the individuals/groups from which you want feedback?	Yes	No	
2.	If so, for each individual/group have you identified the specific type of feedback you want?	Yes	No	
3.	Have you notified those from whom you want feedback that you want feedback, and the type of feedback that you want?	Yes	No	
4.	Are you asking for feedback that is appropriate to the decision you want?	Yes	No	
5.	Have you asked for both positive and negative feedback?	Yes	No	
6.	If so, have you asked for both feedback on the documentation prepared and feedback on the proposal you are making?	Yes	No	
7.	Have you asked the individual to provide you specific feedback rather than general feedback?	Yes	No	
8.	If so, have you asked for feedback based on how the individual providing feedback perceives the document will be received by the coordinating groups and decision makers?	Yes	No	
9.	If so, have you asked that feedback be directed at both behaviors of individuals who will be receiving the document as well as the facts in the document?	Yes	No	
10.	If so, have you asked for feedback on how they perceive the communication will be received?	Yes	No	
11.	Do you ask for feedback from the position of wanting help as opposed to directing individuals to provide feedback?	Yes	No	
12.	Have you identified the key individuals from whom you need feedback from?	Yes	No	
<b><i>Step 2: Coordinate with Individuals/Groups That Have a Vested Interest in the Decision</i></b>				
13.	Have you identified the individuals/group that you need to coordinate approval of the project with?	Yes	No	
14.	Have you identified which of the coordination groups carry the most clout in getting the proposal approved?	Yes	No	
15.	If so, do you allocate your coordination time primarily to those key individuals/groups?	Yes	No	
16.	Have you inquired to the decision makers as to which individual/groups they would like your proposal coordinated with?	Yes	No	
17.	Do you plan to send the feedback group copies of your full documentation or extracts?	Yes	No	
18.	Have you asked for feedback to be received at a time which is consistent with the date that your proposal should be	Yes	No	

	implemented?			
19.	Do you carefully consider all feedback and then make the changes necessary to improve the acceptability of your communication?	Yes	No	
	<i>Step 3—Get Approval to Proceed.</i>			
19.	Have you identified all of the individuals/group that need to approve your proposal?	Yes	No	
20.	If so, have you identified the sequence of approvals that you should obtain?	Yes	No	
21.	Have you adequately addressed all of the objections from your feedback group?	Yes	No	
22.	Have you adequately addressed all of the objections from the groups you coordinated the project with?	Yes	No	
23.	Have you made the wording changes that you believe are reasonable from the feedback group?	Yes	No	
24.	Have you made the wording changes proposed by the coordination individuals/groups?	Yes	No	
25.	If you get approval for the project, are you ready to implement the project?	Yes	No	
26.	If you get conditional approval for the project, are you prepared to take those actions to meet the conditions?	Yes	No	
27.	If your proposal is rejected by the decision maker, have you identified the reason for the objection?	Yes	No	
28.	If so, can you overcome that objection and resubmit for approval?	Yes	No	