Framing Executive Discussions

[00:00:00] **G Mark Hardy:** Hello, and welcome to another episode of CISO Tradecraft, the podcast that provides you with the information, knowledge, and wisdom to be a more effective cybersecurity leader. My name is G Mark Hardy, and today's show, we're going to talk about how to properly frame an executive discussion that should increase the trust you earn and also help you get more of your ideas and initiatives approved.

But before we get started, let's hear a quick word from our sponsor. Risk3Sixty has created a security program maturity presentation templates for CISOs and the security program Budget Template is compiled of several comprehensive tool set lists, such as CIS, SANS, and NIST, as well as feedback from the CISO community.

You'll also obtain a PowerPoint template as a foundation for preparing a business case for executives. You can download it [00:01:00] for free today@riskthreesixty.com. Slant resources. It's Risk3Sixty.com/resources.

Now briefing an executive is not like talking to your kids or your BFF or your neighbors.

Well, why? Because executive time is a very scarce resource and the best executives are going to guard it vigorously. Think of it as a very expensive session with an overpriced attorney. Every second counts against your wallet. You wouldn't want to chit chat when you're paying $2,000 an hour. The American way is to get in and get out as quickly as possible is a matter of respect for your boss's time.

Now, I mentioned the American way because in other cultures it may be considered quite rude to just get down to business without exchanging pleasantries or talking about the family, et cetera. Obviously, you should adapt our advice for your local situation, but when in doubt. Think about that meter running when you're in the room.[00:02:00]

Now, when you initially meet or brief someone, you'll be creating a first impression. It said, you never get a second chance to make a good first impression. Now, unless you're delivering bad news, it's best to start out on a positive note. Now, there's a scene in Mel Brooks's Men In Tights, where the

Sheriff of Rottingham is asked by Prince John to deliver bad news in a good way.

It doesn't end well. If you're like many CISOs who survived the pandemic, you haven't changed jobs for at least three years and as your result, your ability to make a new first impression is long gone. What's not gone though is your ability to change the next presentation that you give to the executive leadership team.

So that's the focus of today's show. How do we frame an executive discussion so we can structure and present information in a way that effectively engages and aligns with the needs and interests of the executive audience. Now, I know that's a mouthful, so let's, let's break that down. First is power in framing a discussion.

[00:03:00] Imagine you're mentoring somebody who wants to become a CISO, and if you go to them and just say, well, Here's what your weaknesses are and I want you to fix them. And then that frame of discussion is bound to what most people feel incompetent and unloved. Now compare that to another approach which says, Hey, I was thinking about how we could take your career to the next level and this year I've really been impressed by these three things that you did well, and that being said, here's the two other things that if you're able to improve on, I think you'd be much more likely to get more professional opportunities that will help you get toward your career goals. Could we work on these together so that we can change the organization's perception of you and give you the best opportunities to succeed?

Now, as you can imagine, that second discussion is going to much more likely move toward a desirable outcome. People are not on the defensive. They feel there's a constructive outcome and it works pretty well Now, next, we need to structure and present the information in a way that engages, and you can do that by [00:04:00] becoming a good storyteller.

Now, years ago I met with T Harv Eker, who's the author of The Millionaire Mindset, and he told me this. People won't remember what you said, but they'll remember how you made them feel. Think about that. You won't remember exactly what you said, but they'll remember how you made them feel. So the experience becomes at least as important as the content, if not more so, and stories can evoke more feelings than just raw data.

I mean, think about it. Do you get more excited about watching a great movie? I. We're pouring through a huge spreadsheet. Now, if you present to the executive team your metric slide that shows patching and clicking rates, then show them another slide of the status of 10 different projects and a third slide

showing the data and how much money is spent, and most of are going to forget the details. To overcome the situation our discussion needs to be concise and engaging. You want to touch on points that you know are important to your audience. Sally Williamson [00:05:00] writes, the most common mistake we see managers make in organizing their ideas is that they quickly dive into details and what doesn't take any preparation to just start talking about everything.

But executives don't need to know the details, and frankly, they don't care. Mark Twain is credited with saying, if I'd had more time, I would've written a shorter letter. Avoid the error of making your executive briefing like a mystery novel where you build interest until the aha moment on the last page.

Instead, do what we do in the military bluff, B L U F, bottom line upfront. Get right to the point and then fill in the details. State the purpose of your meeting upfront, and then describe what success looks like, whether it's a decision, funding, or just to inform. You want to explain how this issues aligns.

It differentiates your business from their peers, and then present an action plan for discussion or approval. By [00:06:00] frontloading your communications, you allow an enlightened executive whose trust you have earned to say agreed long before you finish your spiel. When I was assigned to the US Pacific Command a number of years ago, it's now called Indo Paycom.

From time to time you had to go ahead and brief the four star, and you submitted your briefing. The night before, and if your points were clear and succinct and they led to a logical conclusion, what happened? Your brief got canceled. They didn't need to listen to you. You, the admiral said, Hey. Yep, just do that.

The best. Briefers never briefed, and that's kind of a strange thought because you always want FaceTime with the boss. But in, if you can be trusted to deliver a compelling, straightforward decision paper. That looks at alternatives and presents a viable option with justification. You're going to learn to be trusted to the point where you walk in and said, what do you got Hardy? All this, this, and this. All right, good. Make it so, and that's pretty good. [00:07:00] Now, if you want to improve your ability to properly frame communications with executives, we recommend these eight essential elements.

Number one. The first element of framing is to define the objective. Before you have a discussion with any executive, you need to understand the outcome of the discussion you want to achieve. And if you don't know the end goal or objective you want to achieve, then you're wasting their time and yours. If you

ever read Alice Wonderland, Alice asks the treasure Cat, would you tell me please, which way I ought to go from here?

Well, that depends a good deal on where you want to go. Why don't much care where then it doesn't much matter which way you go. That being said, we don't want to be like Alice. We do want to know where we want to go, and so first, determine the outcome. Which you want to achieve, such as sharing the latest information with the leadership team so they can be better informed or seeking assistance from resources that may not belong to the cyber organization or [00:08:00] escalating something in the company that's currently stuck or documenting a formal decision by the leadership team.

When you're clear on the objective that you want to achieve, you can properly frame your discussion and your decision. The second element of framing is to start with the big picture. For example, let's say you wanted to talk about cybersecurity strategy. What's the big picture or 50,000 foot view? A great way to summarize a big picture is using a scoreboard.

Here's where we are. Here's where we need to be. Here's what we need to do to get there. Now, let's think about this example in terms of cybersecurity. Your organization uses the NIST cybersecurity framework as a scoreboard to say, here's where we are in terms of our cyber maturity score. We think the attackers are currently ahead of us, and we need to increase our maturity on these three important items before the end of the year.

And if we increase our maturity in patching, access control and logging, then we'll limit the attackers from getting into our environment, moving laterally, and staying unnoticed in our networks. We are taking the following [00:09:00] actions to improve our scores and will remeasure our organization in 12 months according to the NIST Cybersecurity Framework.

This will provide us with an objective score to see how much we have improved. Now the focus is to stay at the big picture level that executives will understand. You don't have to go ahead and break down into the individual categories or talk about this, this, or this item, but you're placing yourself accountable to them by saying, here's my existing score, here's my target, and I am going to get there, and I'm going to report in the future and tell you whether I get there or not, and you better get there of course.

The focus is to stay at the big picture level that executives will understand, use stories and analogies to frame the conversation in a way that resonates with people who don't speak tech or cyber on a daily basis. The third element of

framing is to identify key issues. Imagine you've had a long, exhausting day at work.

You just want to relax, and you have two employees who ask to talk to you, and the first just rambles for 30 minutes about [00:10:00] their day and everything's going on and on. And the second employee comes in and says, Hey boss, I really need your help. Here are two things I'm struggling with. I could really use your advice well, who used your time more efficiently?

More effectively, clearly a second individual because they came in there with a key issue already identified. They got right to the point. So be sure you identify the critical issues or challenges that need attention. Focus on the most significant topics that need to be addressed, be concise and avoid overwhelming executives with unnecessary details.

President Woodrow Wilson said it best. Be brief, be brilliant, be gone. If you can do that. You've clearly identified the key issues and have left a good impression. The fourth element of framing is to highlight impacts and benefits. For example, cybersecurity is associated with protection of sensitive information, preventing cyber crime, preserving data privacy, safeguarding [00:11:00] critical infrastructure, promoting trust and confidence, mitigating financial losses.

Preserving business continuity and fostering innovation and technological advancement disease as a way to highlight how cyber enables revenue protection. Now, here's a simple example of the benefits of reporting phishing attacks. What employee is authorized to incur a 10 million loss to the company?

None that I'm aware of yet. IBM's the cost of a dreaded breach report stated the average cyber breach last year in the United States cost 9.44 million, and most of these attacks started when employee clicked on a phishing email. It tastes less than 10 seconds to forward a suspicious email to the security operation center for review. Last year we had over a thousand phishing reports, which we used to stop over 300 confirmed phishing attacks. That's why we need executive support for our anti phishing campaign that rolls out next month. If we call it 10 seconds or 10 million. [00:12:00] Now, I could rework that by moving the call to action upfront.

We need executive support or make that support even more specific. Please set an example for your staff and attend the Monday anti fishing training in person. So like Mark Twain said, with more time, I can make this a whole lot better. The fifth element of framing is to use visually compelling data and metrics.

Most executives appreciate evidence-based insights that enable them to make informed risk-based decisions. This means if you support your presentations with relevant data, metrics, or trends, then you can make a more compelling case. Find ways to present data visually through simple charts and graphs.

Now, here's a tip. If you can't explain your slides over the phone to someone, Then it's too complex to share in a presentation. We've all been in the death by PowerPoint presentation. When someone pulls out a confusing slide with little tiny font and way too much detail, please don't be that presenter.

Stick to visually appealing slides. Use large enough [00:13:00] fonts and understandable pictures that people can see without putting on their reading glasses. The sixth element of framing is being able to anticipate questions and concerns. Remember our first tip, know the outcome you want to achieve. If the outcome is that you want additional budget approval of $300,000 to buy new software, then you should understand the common questions and concerns they're likely to rise.

For example, if sales are down from last year, There's no source of additional funding. The executive team would need to identify projects that they can retire to recycle money for the organization so you can do what you want to do. And additionally, if you're asking for new money, you should anticipate that.

Your ask will be compared against other projects across the company. Different organizations have different requirements, a hurdle rate, a ROI, whatever it happens to be. But essentially the question comes down to why should the chief financial officer fund another project in cyber over a new marketing request?

because we [00:14:00] understand marketing and that's how we go ahead and bring those customers in. And if you can't defend your position, Then you can expect the dollars to go over the marketing team instead. Now, one of the best ways to address this is to have a slide that discusses your audience concerns. Early on, your executives might be thinking, why does a cybersecurity budget need to grow an additional 10% next year?

Address that upfront. Point out that we booked new clients and that's going to increase our revenue by at least 5% next year. And additionally, this new data privacy law passed forces us to perform functions which we haven't done before. And therefore, to meet regulatory requirements, to stay compliant, avoid fines, and to accommodate their business growth, we need to add two additional headcount to the organization.

Now also be prepared to discuss what can happen if your request is not funded. Now, anticipating questions and concerns promotes trust and confidence. You let the executives know that [00:15:00] you're thinking like them, and as a result, that should increase their trust in you. The seventh element of framing is to provide actionable recommendations.

If you're seen as doctor, no, people will avoid you. Don't be the type of person that says, this can't be done. Be Dr. Know How that says, here's what we can do at an acceptable level of risk to accomplish this goal. Always offer specific actionable recommendations that executives can implement. Explain your rationale in a concise manner and focus on the organizational impact.

For example, let's say there's an internal audit and identifies a finding that the access controlling your SharePoint site has issues. People who change jobs in the company retain old access to PII or financial data in SharePoint sites, which they don't need in their new roles. So you can give three options to the business to consider and spell out the consequences.

The first option is to do nothing. Let's just stick with the status quo. Well, before you do that, do a little bit of homework. How much harm has happened to our company over the last two years from [00:16:00] a situation? Perhaps none. Do we expect it to be any different in the future? If the answer is it's going to be really painful, then you can help others arrive at the conclusion that this recommendation isn't a good option.

The second option is to take a more aggressive stance and require access to be based on roles that are reviewed once a year. In addition, if there's a job change, we can implement an ad hoc review. And this option clearly solves the issue, but what's the cost of creating roles for every single person in the company?

And how long would this take to implement? And you might find it's a lot of resources spent and maybe three years of effort for something that might not be worth the cost. Seems like we're building a million dollar fence to protect a hundred dollar asset. That's not the right solution either. kind of like Goldilocks and the Three Bears, maybe something right in the middle works out best.

The third option is that the organization looks at IT solutions that expire access to SharePoint sites when someone hasn't logged in in 90 days. Now, that might be easier to deploy and it doesn't require a lot of effort for [00:17:00] the business. You talk about what it would take to implement this type of solution.

And the new IT costs to license this type of software, and then you've got a potential winner. Now, these three recommendations allow the organization to make thoughtful decisions because they understand the actions that need to occur and their consequences. Now that insight gain comes from your actionable recommendations.

Now, be careful. Just don't stack the deck with your favorite recommendation, along with two out outrageously ridiculous alternatives. Executives will see right through that very quickly, and you'll lose a lot of credibility. The eighth and final element of framing is to seek alignment with existing perspectives of the organization.

There's an old saying in business and in life, that pioneers perish while settlers prosper. If you're the first to explore new territories or pursue unproven ideas and strategies, then you're creating risk and uncertainty. If you're out by yourself as a pioneer, then you lose the value of being able to rely on important infrastructure, support systems, and lessons learned.

[00:18:00] You also miss opportunities to seek alignment. An important input from others. Don't lose out on crucial consensus building opportunities you should routinely seek to align cyber capabilities with business priorities. Now, we were warned about that. There's a quote in The Prince by Niccolo Machiavelli that comes to mind.

It oughta be remembered that there's nothing more difficult to take in hand. More perilous to conduct are more uncertain in its success, that it take the lead in the introduction of a new order of things because the innovator has for enemies, all those who have done well under the old conditions and lukewarm defenders and those who may do well under the new.

This coolness arises partly from fear of the opponents who have the laws on their side, and partly from the incredulity of men who do not readily believe in new things until they've had a long experience of them. Wisdom from the centuries, but there's some stuff still applicable today. For example, let's say the [00:19:00] organization is marketing a new piece of software to customers, and if you went to them and gave them all the cyber requirements to make this thing totally secure, they might just see it as a roadblock preventing them from hitting their sales goals and their delivery dates.

However, If you can have a business conversation with the VP and say, Hey, it looks like this new piece of software is going to be really good for the customers. Let me ask you, is there anything you're worried about from an

operational perspective, from a business perspective on this item, which I can help. That business unit might say.

Well, they're worried about the impact on timely customer delivery when you hear these words from the business and understand their perspective. Then you can create alignment on strategic goals. You can offer specific things that would directly improve the timeliness, such as optimization, scalable cloud deployment, a DevSecOps approach to updates and so on.

Give the business a few options that they can consider and provide recommendations and timelines. And if you create a shared alignment, you get business units, executives recommending security instead of it being forced upon them. This training will do wonders to improve your influence ability. [00:20:00] Now I hope you've enjoyed learning about how to properly frame executive discussions.

Always frame an executive discussion so that you structure and present information in a way that effectively engages and aligns with the needs and interests of your executive audience.

And we talked about eight elements of framing to accomplish this. Number one, clearly define the objective. Number two, start with the big picture. Number three, identify key issues. Number four, highlight impacts and benefits. Number five, use visually compelling data and metrics. Number six, be able to anticipate questions and concerns. Number seven, provide actionable recommendations. And number eight, seek alignment with existing perspectives of the organization.

Well, as you can tell, This shows a lot shorter than normal. Why? Because we're trying to demonstrate the point, get to it, get it done, and get out. So hopefully you found this valuable to you. If you have not subscribed yet, please click the subscribe button if you're [00:21:00] watching us on YouTube or follow us on your favorite channel for the podcast.

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