



# Stop Giving Them Option C

As design leaders, we need to understand how our own brand and personality fits into the organization's larger personality. In order to be successful you'll need to consider how your brand is perceived by other stakeholders. Designers put a lot of energy into "craft," turns on a powerpoint deck, or an idea, but a lot of decisions are made outside of formal meetings. Think about how you can spend energy on small "campaigns" that help create "friendlies" outside of your realm.

Finding common ground and winning people over while planting the seed of big ideas before they're happening in a formal meeting can increase the likelihood of your team's success. **ESPECIALLY**, if you're in a company that doesn't have design at the core.

In order to stop giving business leaders A, B, and C you need to go upstream from the decision and work on a campaign that harnesses persuasion, justification and gravitas in order for you to only present Option A to great success.

Want to run the game we played?  
Do it with your team!

## Act 1: Persuasion: Harness your influence

To be successful you need to win people over.

Why? Because how you're perceived amongst a vast system of stakeholders affects your ability to influence decisions, protect your team, and find permission for resourcing, and command budgets.  
How: Win people over by identifying how your personality fits within your organization's dynamic.

## Act 2: Justification: Manage your pipeline

To be successful you need to strategically rank the variables.

Why? Using a scoring mechanism helps you bring quantifiable and strategic facts to any pushback you might receive, it also acts as a change management tool when communicating messaging.  
How? Build a pipeline scorecard that reflects the organization's values back to them.

## Act 3: Gravitas: Only present Option A

To be successful you need the idea to resonate deeply.

Why? You've already done steps 1 and 2 in order to gain the permission to present one idea. This is where the credibility of your idea needs to shine.  
How? Teaching your team to reflect on their own work using a storytelling flowchart minimizes the length of your redline revisions and empowers your teams to think critically about their own work.

Facilitators:  
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# Polars Activity Run Sheet

**Time:**

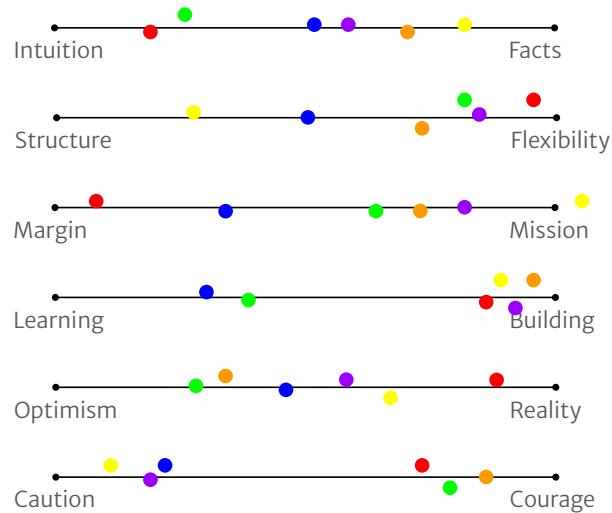
- 10–30 minutes

**Supplies:**

- Painters tape or whiteboard
- A piece of paper or none
- Sharpie Marker or whiteboard markers

## Step 1: Individual Personality

- Draw the spectrums on a whiteboard.
- Have team members write their initials along the spectrum on where they feel their work personality exists.



## Step 2: Company Personality

Have team members individually identify where they think the company personality sits. (It's good if they're different! Each person's perception is valid to their own experience navigating the company. It'll help you coach and mentor their journey.)

## Step 3: Discuss the need to navigate the divide

Help the team understand that the tension between teams and the broader organization is normal, and it's something to be considered on a regular basis. This isn't an "us vs them exercise" it's a way to find common ground, help the team navigate complex conversations with greater likelihood of success and get in front of any misunderstandings.

## Additional Discussion Prompts:

- Considering the distance (large or small) between your personality and the organization's, how does it make you feel?
- How often, if ever, are you reminded of the distance between you and the larger personality?
- What kind of actions might you take to think more like others in your company?
- How might you consider your next cross-disciplinary meeting? What might you do differently?

## Advice:

We don't recommend that you do this exercise at the same time as you facilitate it. Team members might worry that there's one type of answer or personality that is best on the team. (And you know that's never the case!) Limit the additional stress and keep your own reflection out of the exercise.



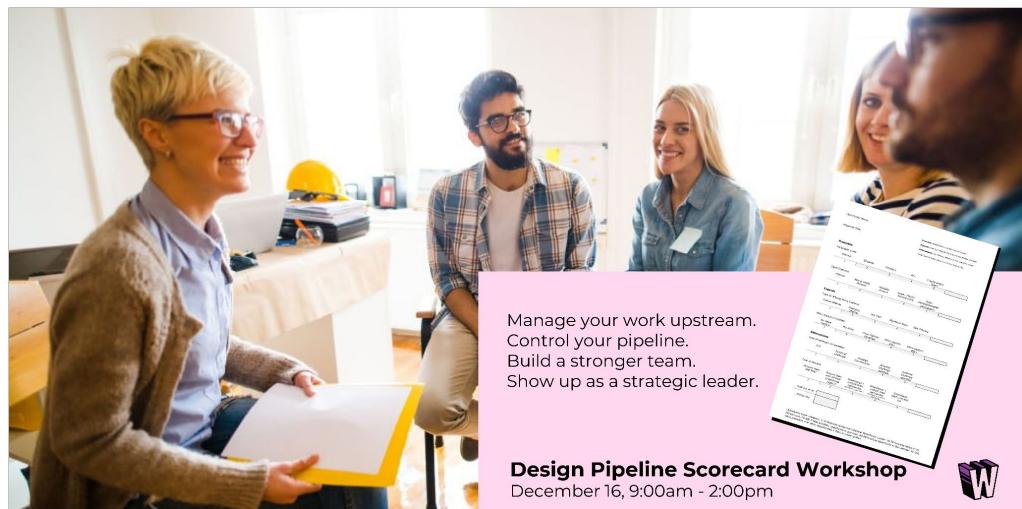
# Build your Scorecard

Thank you for exploring more about what it takes to be a great design leader. As you continue to level up in your organization, leadership takes on a new meaning.

Campaign with persuasion, justification and gravitas and you'll go far.

As a gift, please find the following coupon code available for you for our next [Scorecard Workshop](#).

Discount Code:  
DesignX



From co-op to firm CEO in 10 years.  
Build the one asset that you'll need to transform your day-to-day as a design leader.

Being a design leader is tough. No one is ever happy with you.

- You have to manage various stakeholder requests.
- Navigate an organization that doesn't understand design and resourcing.
- Help your team find breathing room in an unrelenting request pipeline.
- Advocate for your decisions when they get escalated past you.

I've been there. And the one asset that continues to help me manage dynamic, complex and high-pressure environments is making a pipeline scorecard that helps me prioritize the right tasks for myself and my team. I've built this workshop to help design leaders identify their mandate and build out a way to quantify the importance of various requests. This will help you manage up and across your organization and help you be strategic with every decision. You'll leave with a scorecard in-hand and ready to apply it that afternoon.

This is a \$25k engagement when it's B2B. I'm bringing it to you in a workshop setting in order to decrease the cost while maintaining the value.

Let's build you a scorecard.



# Pitching Option A checklist

This is inspired by consulting and design strategy work flows.

Many leaders find themselves coaching green teams and are missing a middle level of mentorship. Use this flow chart as a way to help lesser experienced team members critique their work before sending it for review.

Ask yourself	No	Yes	I'm not sure...
Is the main message clear?	Then step away from it and draft your message on paper in order to confirm what you're trying to say outside of the format of the deliverable.	Walk through it again to double check and then send it for further review.	If you're not sure then the message isn't clear enough and you should work on refining it before looping in someone.
Does each part stand alone or does it need voice over?	Tread lightly. A document that needs voice over in order to be understood will have a hard time winning over audiences once it's out of your hands.	Great, the means your messaging is clean, clear and simple. Send it for review.	Test it by sending it to a colleague and have them play back to you what they think the main message is.
Is the information organized in a logical sequence?	Then break the deliverable apart and see if the flow of information should change.	Great, keep building out the deliverable.	If you're not sure because it's for an executive audience, then bring someone in from the SLT to review in order to check.
Do the visuals reinforce the story?	Perhaps there's a metaphor that's missing, or a key theme that you need to decide on before trying to add more visuals.	Great, make sure they're not stock imagery.	Draft visuals are ok if you're still refining messaging. Spending too much time in the wrong direction will have you waste time making perfect visuals at this point.
Do you know why you've made certain decisions?	That's a problem. You'll be proud of your work when it's done well, thoughtfully, and helps your audience have real impact. If you've lost site of certain decisions then step back and check in with your leader.	Great, keep going.	You'll know. And you'll need to be able to articulate them when you send it for review. All reviews need context for the reviewer and it's your job to have that ready.
Are you excited for the audience to receive the deliverable?	That's tricky, you're going to have a complicated meeting if that's how you feel.	Even better! All the work we do is to help others be successful.	Then check-in with your project lead and perhaps loop in SLT. There might be internal politics that are making you nervous and it's not your work making you feel that way.