



Mastering Big Moments

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Mastery

Think about a big moment at work: a board meeting, a pitch to investors or clients, a tricky negotiation or an important conversation with a colleague.

The stakes are high. The issues are complex. The audience is challenging.

You want to make a significant, memorable impact. Enhance your reputation.

Mastering this moment requires:

1. Clarity of purpose.
2. Diligent preparation.
3. Skilful participation.
4. Confident closing.
5. Disciplined follow-up.

This document gives you the critical questions to consider in each of these five stages, along with three scripts for you to customise.





Breaking it down

Use the canvases on the following four pages to help you prepare for your big moment. They will help you to work out what to say and how to show up. Anticipating the interests, questions and reactions of the others will improve your clarity, confidence and flexibility in the moment.

Work through each of the five sections, answering the questions in the boxes provided. Use sections one to four beforehand, and section five afterwards.

Make time to do this properly – it should take you around 30 minutes to complete, assuming that you've already done some thinking.

1 Purpose

Impact

What is a successful outcome? What do you want people to think, feel and do afterwards?

Multipliers

What do you want participants to say to their colleagues and others in the network afterwards?

Journey

What comes after this moment? How does the journey shape how you prepare for this moment?



2 Preparation

Map

Who are your sponsors, allies, detractors, experts, collaborators? Who do you need to convince and rally behind you?

Instil

What fuel do you need to help you apply a positive, constructive mindset?

Anticipate

What are their likely questions, issues or expectations for how you engage them? What will stop them from supporting you?

Craft

What messages do you want to convey?

Test

Who can you test your thinking with?

Substantiate

How will you demonstrate the rigour and logic of your messages?

Set up

What is the best physical or virtual environment for the moment?

Illustrate

How will you illustrate these messages vividly e.g. stories, visualisations, analogies or statistics?



3 Participation

Initiate

How will you make a strong first impression?

Manage yourself

How will you manage your reactions when you face a tricky question?

Opening

What will you do to grab people's attention and frame the discussion to invite constructive contributions?

Ask

Which questions will you pose to gather ideas and understand full perspectives?

Listen

How will you manage yourself to listen attentively and observe reactions fully?

Focus

What will help you maintain focus on the outcome, avoiding distractions?



4 Closure

Summarise

How can you best distil what you heard?

Thank

How will you show appreciation for the attention and contribution of the group?

Confirm

How will you set out actions and responsibilities?

5 Follow-up

Follow-up

How and when will you deliver on actions and encourage others do likewise?

Seek advice

Who will you ask for advice on how to sustain interest and momentum?

Learn

What have you learnt about yourself, the team, and the issue? What will you do differently next time?



Scripts

Speaking clearly instills confidence in the audience and enhances your credibility.

That's why many of my clients – CEOs, senior executives, entrepreneurs and professionals – use scripts to help them rehearse what to say in different scenarios. Some role-play the moments with someone else.

Scripts provide you with a foundation of material that you can customise.

One note of caution: don't fall into the trap of using a script word-for-word when the interaction requires something else. Otherwise, you'll come across as over-prepared and inflexible.

Also think carefully about how to communicate in other ways too, such as your posture, tone and volume of voice, eye contact and hand gestures.



SCRIPT 1

How to encourage people to say what they truly think

Situation

A big leadership meeting, discussing why growth in the business has stalled. Typically, people don't speak up or shy away from disagreeing with each other.

Objective

You want to create a positive, inclusive atmosphere in which people can share their best thinking, unafraid of offering a different perspective from others.

Mindset

Optimistic, curious (to find out what people truly think), hopeful.

Posture

Strong, confident, leaning in.

Voice

Positive, creating energy to get attention, softening voice when you talk about how you invite different perspectives.

Eye contact

Look around the room (physical), straight at the camera (virtual).



Growth in the business has stalled. It's not clear what's causing it, despite our best efforts.

I know this is a complex topic. And it's one that's important to our business. So, I'm especially keen to surface our best thinking. I know we have some big brains and plenty of experience around here. I believe we have the answer right here!

I'll make sure that everyone has an opportunity to have their say. When you have the floor be kind to the listener by being succinct. No lectures please. I also ask you to listen attentively and avoid interrupting.

Disagree if you have a different perspective. Remember that disagreeing doesn't mean that you must fall out.

Try to focus on what we can do to move things forward. Make suggestions.

Let me start by posing this question...



Tips

- Actively make sure that everyone speaks.
- Interrupt anyone who dominates the session, explaining what you are doing.
- Ask questions like:
 - What's not been said here?
 - What would we discuss if we now agreed to discuss the undiscussables?
 - If you were feeling very brave, what would you love to say?
 - What mistakes are we making?
- Show appreciation at the end for the courage people showed as much as their perspectives.



SCRIPT 2

How to handle an aggressive person

Situation

You're giving a pitch, and you find one person is aggressive, dismissing what you are trying to say.

Objective

Maintain your composure so you can think clearly, express yourself with conviction, and come out strong. Explore new options.

Mindset

Calmness, curiosity for what she/he thinks, confidence in your abilities.

Posture

Relaxed, avoid slouching. Both feet to the floor.

Voice

Calm, confident, use pauses. Take care not to over-talk or speak too softly.

Eye contact

Direct when you want to make the point, away when you are thinking and listening, if that helps.



Thank you. May I stop you there? I can see you feel strongly about this and I'm keen to address your concerns as best I can.

I'd like to fully understand what you're saying. Can you tell me more about your perspective?

Am I right when I say that we agree on these points [...]?

From what you say, I think we have different opinions about [...]?

What changes could I make to address your concerns?

If you were in my shoes, what would you do?

Let's consider this topic from a different perspective, say as a customer or investor.

What would they say if they were listening to this conversation?



Tips

- Take some deep breaths, without making it too obvious to the other person(s).
- Adjust your posture so that you're sitting up straight, with your feet to the floor. Both help you think more clearly.
- Do your best to hold off on making assumptions about why they're acting this way. There's plenty of time after the meeting to reflect on what's led them to intervene in this way and to judge whether it's personal.



How to say no firmly and gracefully

Situation

You've been asked to give something – e.g. approval for investment or your time – which you don't feel you can because it's not a priority for you.

Objective

Be clear that they recognise that you are saying no and that they understand the reasons for the decision.

Mindset

Clarity, directness, positivity.

Posture

Typical upright pose, without coming across as too rigid (and hence defensive).

Voice

Flatter tone than in other situations, keep it brief.

Eye contact

Direct when you make the point, so they know you mean it.

“

I appreciate you asking me to join your meeting. On this occasion, I can't. I have other priorities that require more of my time and attention, and I don't think I can add that much to the discussion based on the topic and the people you have brought together. I know you'll do a great job. Is there anything I can do right now to help you prepare?

”

“

I understand that [person x] would like a conversation with me. I'm afraid my schedule won't allow that. I trust you to have a good conversation with them, to understand their perspective and explore what you can address. You've worked closely with them so they should open up to you. If after you've exhausted all of the options and you feel you can't go any further, by all means come back to me to say what you want me to do.

”

“

I can see that the effort you have put into this proposal. I'm grateful for doing this. At this stage, I can't support it. I don't yet see the benefits clearly enough and I'm not convinced that the plan will deliver what's required. If you think the proposal is sufficiently strong enough, rework it and bring it back. You'll know that there's a lot of competition for investment in the business so do your best possible work!”

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Tips

- Say what you think.
- Be constructive.
- Keep it brief.
- Don't look for affirmations, especially if they look disappointed.

And finally

If you're looking for further help to master big moments do get in touch: david@davidlancefield.com

You can read what senior executives and professionals said about **my impact and style**, and find out more about **my services and background**.

For more resources, go to davidlancefield.com where you can:

- Listen to, and watch, the *Lancefield on the Line* podcast.
- Take the **Extraordinary Essentials** test to identify your strengths and development points.
- Read my articles in *HBR* and *Strategy+Business*.



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