

The Evolution of the Elevator Speech

by Steven Hale

I came to my job with an understanding of the importance of detailed documents. My orientation had been to accept lengthy technical and management documents as an appropriate way to communicate ideas, standard ways of operating, and common goals. Because I read and used them, I had also come to appreciate the importance of good organization. I took each request to review a document seriously and set aside time when I was the weekend duty supervisor to do the reading. I'd get my bag of popcorn, put my feet up, and read with a pencil in hand. Trying to help, I would check the references, read each section in detail, and write comments about how to better organize the content to improve the documents' use and readers' understanding of the topic. Come Monday morning, I'd put the documents with comments in the interoffice mail to be returned to their authors. On Tuesday morning, my phone would ring and the callers would open the conversation with, "Who are you, and why did you do this?" I learned the authors had rarely received feedback much less evidence that others had read their work, so I became skeptical of the documents I had learned to respect.

When I changed from managing military programs to site maintenance, I realized I didn't know much about the equipment I

was now responsible for, and that I now needed brief detailed information that could tell a whole story on a vast inventory of equipment in a manner that was both quick and flexible. I also knew that the guy who maintained the boilers had a degree in English literature and read all day, but would get up periodically to check on the boilers and do what was necessary to keep them running. I asked him to prepare a one-page document that described the boilers he maintained (see Figure 1). I wanted to know how many boilers we had, where they were located, what their capacity was, and any other information this guy thought would be helpful. I asked him to rate the boilers on a 5 to 1 scale, with 5 being great and 1 meaning sucks, and he could add any other comments he wanted.

He came back in three hours and handed me a very neat hand-written document. I learned we had six boilers, what the strengths and weaknesses were of each, and that three had potential safety issues. I had the information typed up and took it to mechanical engineering to confirm its accuracy. They confirmed the issues in writing and then turned the problem back over to me. I was then able to take the one-page document to the boss. It would cost \$20,000 to fix each boiler. He put the money in the budget, the boilers were fixed,

ITEM	DESCRIPTORS						RATING					COMMENTS
							q	c	e	s	d	

POSSIBLE DESCRIPTORS:

- Location
- Manufacturer
- Model
- Year manufactured
- Size or capacity

RATINGS:
 On a scale from 5 (best/most positive) to 1 (worst/least positive) for each factor:
 q = Quality
 c = Cost
 e = Ease of use
 s = Safety
 d = Delivery (reliability)

Figure 1. Sample One-Page Chart.

and my crew was amazed that something happened. What was exciting was the next step, documenting the autoclaves. Two plumbers maintained our autoclaves. Two of the autoclaves cost about \$30 million each and are used to cure composite parts by heat and pressure. I asked the plumbers to document the same type of information the boiler maintenance guy had. I wanted to know how many we had, where they were, what their tolerances were, what worked and didn't, and so on. Again, they were to rate the autoclaves on a scale of 5 to 1 and could add any comments they wanted. I learned that some of the older models outperformed the newer ones, but more importantly I learned that simple one-page charts were powerful communication tools. The factory manager of manufacturing invited me to a meeting with engineering to discuss autoclaves. About 15 people showed up, most from engineering. As I listened to the discussion, it seemed that everyone had a different perspective on the subject. I raised my hand and offered to show them what I had learned about autoclaves to help orient the discussion. I put a transparency of the chart on the overhead projector and the room fell silent. Finally after what seemed like five minutes, the head of manufacturing said, "That's how many we have!" Again, it became clear that individuals in the same group did not have the same understanding of our equipment and issues related to them. The document brought everyone up to the same base knowledge.

A third scenario involved building chillers I was assigned to maintain. Chillers provide building air conditioning and are an extremely valued asset. They can cost up to \$1 million

each. Again, I met with a person who worked on all chillers and asked for the same type of information, one-page charts that were not complex but communicated the important information. By now I had figured out that I could shrink the charts to 74% of their size so they would fit in my calendar.

Having the charts with me was what eventually gave birth to the elevator speech. A manager at another site was having difficulties with his chillers. He was anticipating some ugly lawsuits with the manufacturer due to failures. He asked to meet with me to find out who else had chillers with these problems. I asked him what kind his were then flipped open my calendar and checked mine. Thirteen of my chillers were of the problem type. Next,

I asked about size. Seven of the 13 were of the problem size. What year they were manufactured? Two of my seven were manufactured the year of those with failures. The serial numbers? Oh, good, I didn't have any of those. He asked what I was looking at. We realized I was walking around with a vast amount of information that we could use to better manage our equipment.

To my knowledge, no one else was documenting our equipment and its performance in a form that could be shared with engineering and management, in a way that facilitated conversations about roles, responsibilities, and expectations. This information helped those of us in maintenance and engineering plan for the future. It showed where we had weaknesses and where our requirements were outside the capability of the equipment. We gained a much better understanding of how good and bad things were using this tool.

About this time the company that handled our water treatment was handing me a series of 40-page documents showing how things were going. The firm had reason to be proud, but no one, especially my boss, was going to read a 40-page document.

I got together with Todd Harriett, who worked with the water treatment firm, to work out a way to better communicate what his firm was doing and what had been accomplished. In preparation for our meeting, Todd created a three-page document detailing his firm's goals and benefits. That's when the expression "elevator speech" surfaced.

Masters Statement

What advice would you give someone on the path to becoming a master in his or her field?

Remember who the audience is. Don't communicate to meet your needs, but the needs of that audience. Many people want to prove they "know" their stuff. What they should focus on is getting the information out that will help others make better decisions. Don't assume that people have the same base of knowledge. They may know a lot, but what they know is unique to them. Understanding happens when we share the same base.

I told him I wanted one page that would fit in my calendar or on one transparency that I could explain between floors in an elevator ride. This last requirement was a bit steep, since I was never on an elevator that went up more than five floors. We went to a conference room, got a flip chart, and drew charts. I asked what he wanted to communicate about the company. What went up, like return on investment? Went down, like safety incidents? With those questions, Todd grabbed the pen and created one picture.

The breakthrough happened when we focused on the four things my company cared about: cost, delivery, safety, and quality. Todd put his company's story under each area. He had created a prototype that he could use with other customers and in sales calls to potential customers. For me, the chart meant I could go to my management with something that spoke of success using measures they cared about.

From there we continued pushing the parameters on how to communicate successes and problems. This format allows people to be creative. It helps them organize information so they can spot problems. When I started, I didn't know much about facilities or equipment so I needed the information to evaluate and support my crews' efforts. It has helped me get management's support and enabled me to respond to comments and questions. 🏔️

NOTE: Steven Hale is a Masters Series speaker at ISPI's 2002 International Performance Improvement Conference & Expo, along with Todd Harriett, Vice President of Marketing for Odeco Nalco. This article describes how Steve and Todd came to the realization that information packaged in brief format can influence decisions and shape relationships. It is told from Steve's perspective.



Steven Hale has been a manager of facilities and maintenance for a large manufacturer for more than 20 years. During that time he has supported and been responsible for facilities in Europe, Asia, and the United States. His work requires him to understand the requirements of tenants and management and to coordinate the efforts of numerous craftspeople. Steve is a graduate of Ohio State University.



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