Blogs
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Public Chatter

How to Ensure Those on Your Engagement Team Will Stay the Course

You'll soon see our blog about how to give a "non-answer" answer in the appropriate circumstances; this one is more about ensuring everyone on your engagement team - when meeting with investor stewardship teams - is providing consistent answers and is staying the path with the proper demeanor for your engagement. Here's a few suggestions about how to perhaps achieve this: **1. Limit who is on your engagement team -** You want as small an engagement team as you can. This helps to make engagement more intimate. Which helps to build relationships. You should be doing this two ways. One is to keep a critical eye open during a prep session with those not accustomed to the way engagement works – and if it seems like they're not really going to get the hang of it, you should politely remove them from the engagement team. Hurting their feelings a little is more preferable than a blown engagement. The other way is to simply gain the valuable input from subject matter experts on your team, but don't ask them to be on the engagement team. For example, you may ask your environmental team for input on climate-related issues, but not include them in the engagement process directly.

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2. Stay on message with ready answers - You want to script your answers. Then script it again. But then ditch the script. What do I mean by that? I mean you want to create a message that you - and everyone on the engagement team - can stick with, regardless of how the topic at issue is raised. But you want to sound fluid when that topic is discussed. You do not want to sound like you're reading a script. That absolutely is a killer when it comes to being persuasive. Having a prep session if the engagement is important is crucial. Having a prep session if you have someone not accustomed to being involved with an engagement is also important. In the prep session, if someone is not on message, you need to take that seriously. Really make sure they understand that they can't go rogue during the real thing. You may need to have someone above their management level drive that point home if you don't think they're taking you seriously. Not an easy situation.

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3. Understand who answers which questions – You need to be organized. You should already have hashed out the agenda for the engagement in advance. So for your engagement team's own purposes, have it in writing about who leads on which agenda item. Make sure everyone on the team gets the memo.

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4. Understand who handles the curveball questions – You'll soon see a blog from Karen Lisko about how to handle an unexpected question. There's a formula that you can use to handle these types of queries. This is valuable advice that you can use for any aspect of your life.

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5. Agree on the overall demeanor of your approach – I'm sure you've heard that the bulk of communication among humans is non-verbal. That's true even if your meetings are on Zoom or another video platform. What you're doing with your hands, your facial expressions, matter. Make that topic part of your prep. In most cases, I imagine you want the meeting to be collegial and collaborative. If so, your team should be all smiles. And guess what - smiling is the *number one* sign of nonverbal confidence. It may sound crazy but it's something that should be practiced. Many think they're smiling, but that's only happening on the inside. It's not apparent to others. Call people out to get them thinking about that…

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