

Selling Safety to Upper Management

Introduction:

Picture this scenario, you are the Safety Manager sitting at a conference room table with several other people and the conversation goes something like this...

Operations Manager: "I'm working eight people short between day and evening shift, I need more people!"

Human Resources Director: "Turnover is 28%, we can't get enough qualified people!"

Finance Director: "We are paying too much in overtime, we are well over budget for the quarter. We need to cut back on overtime!"

And the CEO receives a text message reminding him that he is overdue on his business conduct policy training just as the door swings open and the Communications Director storms into the room announcing that a story is about to break on ET News at 6:00 "that a major competitor is about to move into our backyard." OK, that may sound a bit over the top, but I suspect that sounds familiar?

Safety can be a tough sell to leadership in any situation. If everything goes right, nothing happens immediately. No one gets hurt. Profits don't go up, costs don't go down, inventory doesn't turn over any quicker, etc. There are many reasons that upper management may not be engaged, but often they feel satisfied with the current performance and any problems will get handled on the floor. Handling usually means disciplinary action. Sack the perpetrator and the problem is easily solved.

In addition, their schedules are jam-packed and they often must make high level, high impact decisions with little time to consider alternatives. And you are just one of several streams of people, information and problems hitting the leader at one time.

In general, safety is not seen as sexy, it is something to be tolerated, endured. It's a set of procedures to be followed. If everyone would just follow procedures we wouldn't have a safety problem. So, how do you make safety important to leadership? How do you communicate and influence leadership? How do you "sell" safety to leadership? You can have the best plan, but if you can't communicate the benefits or the impact of your plan to the leaders who make decisions, if you can't sell leaders in a convincing way on safety, your plan will simply sit on a shelf.

Getting a clear concise message across becomes critical. If you nail your message, those same leaders will become strong sponsors for you increasing the likelihood that your plan, idea, SMS will be successful. You must be able to sell safety to leaders who may not be in a buying mood.

Unfortunately, the importance of selling is often overlooked among safety professionals. We can quote standards, conduct audits, investigate mishaps, etc., but selling is not often a tool in our toolbox or skill we develop. There are many models for selling, but the basics are fairly consistent and can be applied to selling anything including safety to leaders:

1. The person delivering the message must be credible.
2. The messenger needs to know the audience.
3. The message must be concise.

You don't need to be a master seller, but you do need to know some basics and you need a communication plan.

The Messenger

The messenger must be credible and it starts by believing in your own plan or message. When sales people lose their excitement and enthusiasm for what they sell, their prospects diminish equally. Mental conditioning is to selling as physical conditioning is to sports. If you are not sold on your plan, even enthusiastic about your plan, don't expect anyone else to be.

The messenger must also be seen as a leader. Unfortunately, too often we play the role of safety enforcer or compliance officer. We get tagged with lots of titles, but not often enough "leader". To be seen as a leader you must have credibility and you must act like a leader. But, if all they hear from you is "our guys are not wearing their hard hats", or "they keep taking short cuts, not following procedures"...safety, safety, safety...blah, blah, blah. Those messages get stale very quick and worse you are boxing yourself into a compliance role as a safety officer...not bad, but it doesn't put you in position as a leader and your job of selling safety to leaders just got tougher.

Don't be seen as a safety compliance man; be a leader. Technical skills and setting an example (I hope) are a given, here are some leadership attributes that successful leader's display and you can employ to build credibility:

- **Personal Vision and Belief.** Have a vision or belief such as "all injuries are preventable" or "no one gets hurt" and look for opportunities to share your vision and how it contributes to the overall success of the organization. In fact, the best leaders never miss an opportunity to share their vision.
- **Communication.** Go beyond email. Integrate your message into routine correspondence. Take advantage of every available media to share your vision. Company blogs, newsletters or other social media can be a good place to start
- **Recognition.** Recognize leaders, middle managers, operators and hourly employees when they take a strong position as it relates to safety or for significant accomplishments.
- **Measures / Scorecard.** Leaders always know the score. Make sure your leaders know the safety score. More on scorecards later
- **React with a Sense of Urgency.** Keep leaders informed on a timely basis. Ensure your leaders know when a significant event occurs and provide a course of action.

Credibility is the foundation of effective leadership and requires constant vigilance. Personal attributes of Credible People include:

- Decisiveness – Identifying and acting on key factors such as specific injury trends or significant events in a timely manner.
- Determination – Accomplishing the right goals at the right time regardless of opposition.
- Perseverance – Press ahead. Invest your energy to complete the task, pursue the goal, and have the strength to withstand the test, the stress, the pressure, and the roadblocks.
- Initiative – Recognizing what needs to be done rather than waiting for your superior to call you or for someone to ask, or worse waiting until a significant mishap or injury occurs to take action.
- Flexibility – Be willing to change or adjust goals when the situation necessitates
- Resourceful – Leverage resources especially allies. Allies help you get things done. Think about successful leaders...they can't accomplish their goals without allies
- Empathy – Deepen your understanding of the leader's outlook, what matters to them. Even better, how are they incentivized?
- Passion – Above all, be passionate. Everyone prefers to be around someone with passion and enthusiasm. Have you ever been to a safety meeting that started like this? "Well, I know this is a boring topic, but I'll try to get through it." Safety is a noble and exciting field, so show it every chance you get.

"It doesn't matter how you feel, it's how you look. And you look marvelous!" The silent messages we send can speak louder than our words. A study discusses forms of nonverbal communication used to establish like-dislike, potency or status, and responsiveness. Here is what he found regarding the specific communication elements and their impact on your message.

Communication Elements

- Verbal – only 7% of the time are your words used to determine whether or not you and your message are liked or not.
- Vocal – 38% of the time how you sound determines whether or not you and your message are liked or not. Vary your pitch and your delivery speed to hold attention. Uses pauses for emphasis and drama. Pauses allow your audience to absorb your message. Refrain from using non-words and fillers.
- Visual – 55% of the time your body language is the determining factor. Relax your knees. Keep your feet hip-width apart. Loosen up. Chin up. Maintain good posture and move with purpose. Make an emotional connection with your receiver by holding eye contact for five seconds.

The visual element can also apply to props. Use props to help your receiver visualize and remember your message. Visuals dramatically improve message retention.

While the exact numbers can be debated, body language and voice tone (the silent messages) have a large impact on how successfully we communicate our message and thus our plan. To get a point across all elements need to support each other. Practice your message if necessary to ensure that all elements are aligned.

It's not always what you say, but how you say it and how you look when you say it. If your words are not congruent with your sound and look, people will believe your tone and nonverbal behavior.

The Receiver

Who you communicate with should be part of your overall communication strategy and if it's limited to the one leader then you might be short changing yourself and missing an opportunity to build key allies. Allies or supporters help you get things done, including communicating your message. If you can get someone (preferably someone with influence) communicate your plan or idea all the better.

Identify your stakeholders including the mid-level operations managers who are incentivized for safety performance or maybe someone who has the ear of the leader. Stakeholders can come from all areas of the company, not just operations where safety professionals tend to focus. Human Resources often have a role in safety and can be a good ally. Identify your technical support, engineers for example. These types of relationships are not built overnight. They take time; you must be persistent and consistent in scheduling time with these allies once they have been identified.

Be prepared to turn any functional leader into an ally by defining safety in their terms or showing how your plan will have a positive impact in their area of responsibility. Speak their language by using the Safety Drivers. Be prepared to show how safety impacts each area.

Safety Drivers

- Moral – Ensuring a safe work environment is simply the right thing to do and something that everyone gets. This driver applies to all areas, but can be over used and should not be the only driver you use. If you have a leader who only typically sees the “numbers”, then make safety personal to that leader and show the people behind the numbers. For example, how many more people have gone home safe as a result of safety programs and processes or tell the story of an employee who was injured.
- Financial – Show the finance director how the reduction in workers compensation and medical costs can reduce overall expenses. Consistent improvement over time can also reduce insurance premiums, so be prepared with the dollar figure.
- Legal – Show the lawyers how compliance with safety policy and procedures will result in compliance with central regulations and reduced exposure to safety inspectors and other safety authorities.
- Human Resources – There are numerous tools in the safety tool box that when properly implemented engage employees including safety committees, and reward and recognition programs. Show how these programs improve employee engagement and retention.
- Work Process – Tie safety to efficiency. An efficient operation is typically a safe operation.

- Customer Service – How does your plan or idea impact or improve customer service.

Defining safety in operational terms and defining your plan based on your audience will reflect your business acumen and build your credibility as a leader.

Build a solid business case around the drivers using facts related to each driver. Use the facts to build your message and your case. Does your leader know the score? Build a balanced scorecard using upstream and downstream measures. Everyone plays different when they know the score. If it takes more than 30 seconds to read and understand the scorecard, don't expect a leader to take the time to read it. Exhibit 1 is an example of a scorecard that incorporates the Safety Drivers.

Some additional key metrics include:

- Historic trends, are we getting better?
- Performance to goal, are we winning?
- Data Analysis, showing the relationship between upstream measures and downstream measures
- Program Assessment, metrics that identify top and bottom performers

Knowing the leader's communication style can help you tailor your approach improving your ability to get your message across. Generally, everyone tends towards a communication style that falls into one or sometimes more of these characteristics.

Communication Styles

- Blue – Small talk is important to connect with this group. Make an emotional connection first by starting on a personal note.
- Green – Give them time to reflect, they may be quiet, but wheels are turning. You can bypass the emotional bonding unlike the Blues. They get excited about discussing theories and new ideas. Don't be insulted if they are not fascinated by your interests.
- Gold – They like chronological order. To them there is a right and wrong way to do things. Use words like "always, never, must, should." They refer to rules and make TO DO lists. Be sure to state your reasoning for communicating up front and be clear on actions to be taken. Golds don't like wasting a lot of time chatting or brainstorming, preferring to things done.
- Orange – They feel good about a conversation when it is entertaining, fun and interactive. They are notorious for moving around in a conversation if they are not amused or captivated by the person speaking. They want to "get the show on the road," so skip the chit-chat unless they find it entertaining.

A good salesperson knows the communication style of potential customers and uses this knowledge to tailor their approach and message. Further, good leaders will appreciate that you are adapting to their style increasing your credibility. What approach should you take?

The Message

Now that you have built credibility as a leader and identified your allies, it's time to craft your message. Consider your next verbal conversation as an opportunity to sell your idea to the leader or ally, to frame the problem and define what they need to do. Follow this 6-step approach to help structure the conversation and influence behavior of the receiver.

Strategic Conversation Worksheet

1. The Issue – Name the issue or problem. Make it short, concise and to the point. If you feel emotional, use emotion.
2. Instances – Give 2 or 3 instances or examples that support the issue. Give a couple of examples that support the issue. Don't pile on and never begin the conversation with instances.
3. The Impact – State the potential impact of your plan or idea. State the consequences of the issue if corrective action is not taken.
4. I (as in I should have) – What could I have done differently? Often we are reacting to a significant event or a recent sharp increase in mishaps, so take responsibility for your part if appropriate to the situation. Even if it's "I should have said something sooner." Another option is to describe the solution and desired results or goal that must be achieved.
5. Invite Dialogue – Invite discussion and seek collaboration. Ask the leader's opinion. Listen, listen, listen and ask clarifying questions. Restate for clarity.
6. Action Items – Present your plan or idea and action items. Clearly state what you will do and what you want the leader to do.

As the messenger, it's important to understand that leaders often have limited time and you may only have a few minutes to sell your idea. Preparing your conversation ahead of time helps to ensure that you take advantage of every minute. See Exhibit 2 Strategic Conversation Worksheet to help you structure your conversation.

Conclusion

People often buy products based on how they feel about the salespeople. When leaders feel good about their safety leaders, they are more likely to "buy" their plan. Selling skills are as important as technical skills for the safety professional. Building credibility, understanding your organization's leaders and honing your message will improve your ability to sell your plan or idea to your organization's leaders. Understand you may not always win or get everything you want, and it takes time to build credibility, to build allies, and to build relationships that will help provide access to the leaders. When you build credibility, leaders become more receptive to your ideas and opinions opening the door for you to sell safety to upper management.

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| Moral |  10% |
| The injury rate has decreased 5 consecutive months resulting in 23 more people returning home safe. Hazard identification training and bi-weekly president's message was implemented in Q2. | |
| Finance |  12% , \$28,000 |
| Workers Compensation incurred cost were down in Q2 attributable to the implementation of a new return to work program. Improvement in turnover resulted in an 18% reduction in hiring costs year over year. | |
| Legal |  100% |
| Forklift training was completed for all operator. Lockout/Tagout training was completed for all authorized and affected employees | |
| Human Resources |  8% |
| Turnover was down Year over Year. Employee engagement scores are improving which is attributable to an enhanced employee recognition program that includes specific safety behaviors. | |
| Work Process |  |
| 5S implemented at 10 new locations resulted in a more organized, efficient and safe work environment. | |
| Customer Service |  |
| Fewer returns and complaints were received in Q2 attributable to quality improvements driven by the 5S program. | |

Exhibit 1. SAFETY SCORECARD (Hypothetical) based on the Safety Drivers

Consider your next verbal conversation as an opportunity to sell safety, to frame the problem and what you need the leader to do. Follow this guideline to help structure the conversation and influence behavior of the receiver.

Name the Issue or problem. Make it short, concise and to the point. If you feel emotional, use emotion.

Give 2 or 3 Instances. Give a couple of examples that support the issue. Don't pile on and never begin the conversation with instances.

State the Impact. State the consequences of the issue if corrective action is not taken.

What could I have done differently? Take responsibility for your part if appropriate. Describe the solution and desired results.

Invite dialogue and seek collaboration. Ask the leaders opinion. Listen, listen, listen and ask clarifying questions. Restate.

Action Items. Clearly state what you will do and what you want the leader to do.

Exhibit 2. Strategic Conversation Worksheet.

Readers may please note that D. L. Shah Trust brings out two e-journals on a fortnightly basis. These are mailed to those persons or institutions who are desirous of receiving them:

These two e-journals are:

- 1. Safety Info**
- 2. Quality Info**

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