TOP 9 TIPS

For Acing Your First Meeting with a Federal Agency CIO

(or Other Senior Executive)

Are you about to meet for the first time with a federal agency CIO, CDO, CISO or CTO? Are you ready?

Here are some tips from Pete Tseronis, the former Chief Technology Officer at the U.S. Department of Energy and the U.S. Department of Education and now the Founder and CEO of Dots and Bridges LLC, on how to prepare for and succeed when meeting with a federal executive for the first time.

1. Do your homework.

This may sound obvious, but one can always spend more time prepping for a meeting, e.g. researching the agency mission in addition to the agency official's pedigree. Among the questions you could be asking yourself are: Who do I want to meet with and WHY? Is the program that interests me a funded program? Do I understand the expansive and/or disparate mission(s) within the agency? Can I align our solution to the agency's needs? Have I reviewed the agency's strategic plan? Does the agency maintain a separate IT roadmap?

On a related note: Don't assume too much from one's title. Titles do not correlate to entitlement. You should research any speeches, video broadcasts, articles, etc. to garner your agency target's perspectives. Moreover, it is important to determine if the individual you plan to meet is an influencer, a decision maker, an advocate. Additionally, have you researched congressional testimony the individual may have delivered?

2. Use multiple channels to reach out.

Email communication is smart but could find its way to a spam filter. And while phone calls are a great follow-up, a voice mail may not reach your intended target. So, you may consider including social media in your communication strategy. Better yet, send a direct message that addresses a topic that the individual may have posted on social media. Be purposeful in your message so the executive knows you have something meaningful that relates to his or her specific issues or concerns.

3. Engage with a purpose.

A first-time connection with an agency stakeholder, whether by phone, email, or even a quick, in-person introduction during an event — do it with purpose and try to leave an impression. "Connecting" with a person and establishing a rapport is crucial. If/when you are granted quality time with the stakeholder, focus on active listening and learning versus delivering a Powerpoint deck. You want to be received as an informative colleague, not simply peddling a product or service.

4. Get to the point quickly.

Get the person at "hello." Make clear from the start that you understand that agency's requirements — for example, a need for advanced analytics to better leverage the myriad of datasets in support of agency mission. This is powerful. And then discuss how your product or service aligns specific mission requirements in a unique and differentiated manner. To refine your understanding of an agency's IT needs, attend an agency Industry Day, review agency Requests for

Information (RFIs) and Requests for Proposal (RFPs), and track social media channels.

Also, make it less about compliance and scorecards — IT officials should know where the agency stands. It is never a bad idea to seek clarification into the challenges that an agency is experiencing so you can better associate your offerings with that agency's specific needs.

5. Personal connections matter.

There's a good chance you have something in common with your agency target, e.g. your college/university, where you were born, your favorite sports team. Don't make it solely about work. Federal executives are people too, just like you. You may meet one who is more of an introvert while another may be more gregarious. One might keep his or her thoughts close to the vest while another might tell you more than you want to know. Treat them like the people they are and think of that first meeting as an opportunity to cultivate a relationship, not to win or lose a sale.

6. Educate the federal executive you are meeting with about his or her own back yard.

Share your engagements across the public and private sector. It is always of interest to the agency official in terms of knowing how you are addressing another agency's requirements and challenges. Commercial use cases are great exemplars to build-into your dialogue.

7. Explain how you can help an executive mitigate the risks he/she confronts, when possible.

One of the top responsibilities of any agency C-Level official, for example, is to ensure mission-supporting systems are operating reliably, securely, and efficiently. If you can articulate how your product(s) mitigate risk and improved resilience, for example, then you will leave a lasting impression.

8. Make your online presence current and informative. Brand recognition is paramount.

The executive you are meeting will almost certainly visit your personal LinkedIn website and/or your company's website to better understand who you are and what you offer. Make sure these sites present well and, ideally, that there is a federal or public sector page that can be easily found on your company's website.

9. Aim for a follow-on conversation.

During the course of your initial engagement, be sure to ask for a follow-on meeting. This is your opportunity to establish trust and, hopefully, a sustainable relationship going forward. Humility and authenticity go a long way!

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A trusted thought leader with corporate savvy and substantive technical proficiency, Pete maintains several Advisory Board roles in which Companies leverage Pete's sophisticated aptitude to facilitate digital transformation, mitigate supply-chain risk, and enable global growth.

As the Department of Energy's (DoE) first-ever appointed Chief Technology Officer (CTO). Pete served as an innovation advocator for the technology transfer of intellectual property, was an effective and credible collaborator across the international research and development community, and leveraged intellect within the national laboratory enterprise to catalyze economic competitiveness. A self-proclaimed "Connective Tissue Officer," Pete founded Dots and Bridges LLC to satisfy his appetite for connecting dots, building bridges, and nurturing relationships.