Driving Accountability with Cross-Functional Partners

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Agenda

- Who are you?
- Influencing without authority
- Three techniques for driving accountability
  - Who, what, when
  - Estimate for an estimate
  - Compassionate escalation
- Reducing accountability friction
- Pairing accountability with feedback
- Recap

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Who are you?

Name	Clement Kao
Mission	To make product management easier for everyone
Education	Graduated UC Berkeley in 2014 ● Majors: Molecular Cell Biology & Business ● Scores: 3.9 GPA, 770 GMAT, 168 GRE Math, 169 GRE Verbal
Career trajectory	Management consulting → user research → analytics → product mgmt
Accomplishments	● Shipped 10 multi-million dollar B2B products in 5 years ● Promoted from associate PM to group PM within 1.5 years ● Founder of Product Teacher, a PM education company ● 4 books, 150+ essays, 12+ videos, 20+ speaker events, 10+ podcasts (https://tinyurl.com/clement-kao-press-publications)

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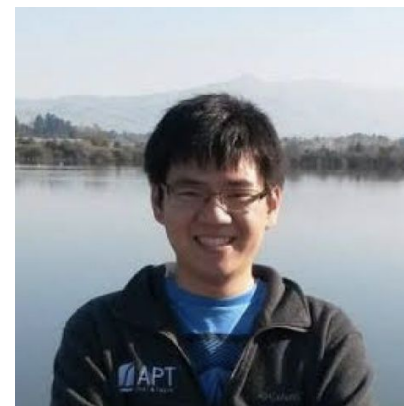
Who are you?

Clement has published multiple books on Amazon:
- **Refining Your Product Skills** at https://www.amazon.com/dp/B08SQRL61T
- **Excellent Execution as a Product Manager** at https://www.amazon.com/dp/B08BWGPR8D
- **Breaking Into Product Management** at https://www.amazon.com/dp/1670792714

If you're looking for 1:1 coaching or other career services, check out Product Teacher at https://www.productteacher.com/

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Influencing without authority

Product managers are not general managers, so we don't have the ability to hire, fire, promote, or demote others

That means that we need to influence the actions of others, even though we have no formal authority to force them to take some action

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Influencing without authority

While we can't force others to take actions, we can use their motivations to help them step up to the plate

Motivations in favor of accountability
- Accurate judgment (good and bad) from people who matter to them
- Praise for them, their reports, and their department

Motivations against accountability
- Getting blamed for things that they feel they don't control
- Lack of clarity around expectations or processes
- Missing incentives (both positive and negative)

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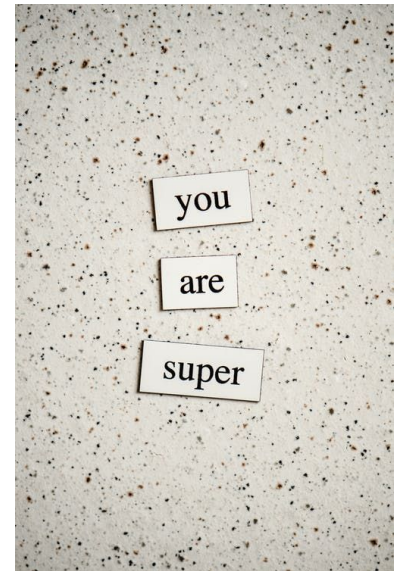
Three techniques for driving accountability

The following three techniques are valuable for driving accountability with cross-functional stakeholders
1. Who, what, when
2. Estimate for an estimate
3. Compassionate escalation

All of these techniques establish clarity and empower people to take ownership for their work

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Who, what, when

Every meeting and every message thread (Slack, email, etc.) must end with "who, what, when"
- Who is responsible...
- For what action items and deliverables...
- By when?

This technique provides clarity for all participants, enabling them to hold one another accountable even without your intervention

Use this not just for team meetings, but also for reviewing "in progress" items (e.g. eng tickets or design work)

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Who, what, when

You can use "who, what, when" irrespective of seniority or context!

Also, consider strengthening "who, what, when" by sending a recap email that repeats people's commitments

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Who, what, when

While this technique seems obvious, think about the number of times that you've personally had unresolved "who, what, when" questions

By ritualizing "who, what, when" as the standard conclusion for all discussions, you no longer need to *hope* that someone will provide clarity

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Who, what, when

When everyone sees the same "who, what, when":

- The whole group **gains confidence** that there's a tangible and complete execution plan
- Each person knows what they own and what they don't own, so there's **no confusion** about responsibilities
- Each team can **plan out their work** and account for dependencies on other teams

Over time, others will start to echo "who, what, when" because it's valuable for them too! So, don't hesitate to be a trendsetter.

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Estimate to an estimate

Many times, you may not be able to get to a tangible "when" because there are too many unknowns

But, you can still help people prioritize their work by holding them accountable for progress

Ask them to give you an estimated time for "when they'll know enough to make a good estimate"

- Valuable for high complexity projects e.g. sales/marketing strategy, engineering discovery, legal/compliance research
- Helpful when people have unclear staffing to your initiative

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Estimate to an estimate

For any "estimate to an estimate", capture this info:

- **What info** is blocking them from having an estimate right now?
- **How** will they get that information?
- **By when** will they get that information?

Then, you both will have a clear plan for resolving uncertainty

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Compassionate escalation

Escalation doesn't have to be a bad thing!

Many times, people are juggling a lot of conflicting priorities and they can't resolve it without their manager's buy-in

Don't threaten to escalate - use this framing instead:
- You're on their side and want them to succeed
- But you have to keep the initiative moving forward
- It's okay if they need their manager to intervene
- And it's okay if they'd like your help to talk to their manager

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Compassionate escalation

Set these rules of engagement upfront for all of your teammates:

1. The first time a ball gets dropped, you'll provide direct feedback and ask them for a plan to improve the process

2. The second time, you'll give direct feedback and ask whether they'd like compassionate escalation

3. The third time, compassionate escalation isn't optional; you'll loop in their manager for the three of you to solve together

If you feel uncomfortable, privately ask your manager for support

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Compassionate escalation

To problem solve with managers, run the meeting this way:

1. **Pave the way**: share the agenda below with the impacted person before the meeting so they know how you'll run it
2. **Set the stage**: discuss why your initiative is important, what the person's role was, and why their gap impacts the business
3. **Identify constraints**: determine which factors can't be changed *(e.g. deadlines, priorities, staffing, deliverables, scope)*
4. **Craft solutions**: select a viable alternative *(e.g. reassign to someone else, change this person's priority, add more people)*

Goal is to set **clear next steps** (who, what, when) to improve processes

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Compassionate escalation

The framework of compassionate escalation works whether you're working with an intern or the head of a department

By applying it **consistently** to everyone on the team, irrespective of seniority, you drive accountability and fairness

With explicit, visible, upfront expectations:
- People feel in control of their own performance
- People are clear about the process and won't feel surprised or ambushed when you take action

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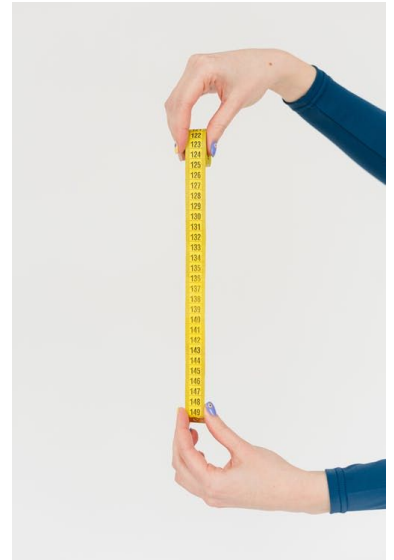
Three techniques for driving accountability

As you implement these techniques, remember to model the behavior you want others to have

Be strict about your own behavior too!

- **Who, what, when**: make sure your own meetings and messages end this way

- **Estimate to an estimate**: any time you're not sure when you'll finish something, proactively provide estimate to an estimate

- **Compassionate escalation**: let others know when you're looping in your manager for help in reallocating priorities, so that they feel comfortable doing the same thing

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Reducing accountability friction

Accountability isn't a negative word! By reducing friction, you move away from pain towards health

Ways to make accountability easier for everyone:
- Set up recurring reminders for people to share quick status updates in Slack or email
- Send regular public status reports for everyone to see each other's progress and what they've committed to
- Celebrate people's accomplishments
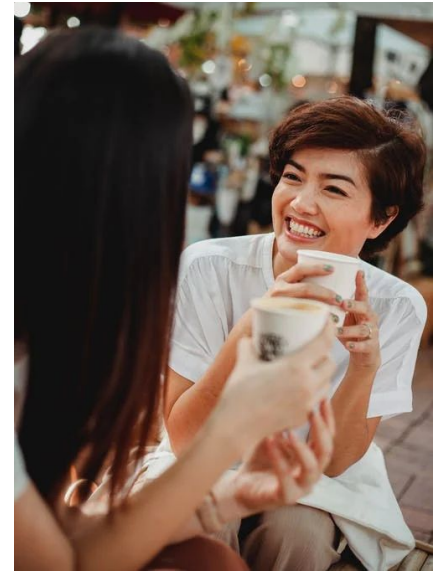
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Pairing accountability with feedback

You don't have to wait for "the final moment" to hold someone accountable

By providing ongoing feedback, you prevent needing to escalate, and you accelerate people's improvement

See our lecture on how to give feedback to cross-functional partners

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Lecture summary

As product managers, we don't have the formal authority to change the way that others work, but we're responsible for their performance

By using thoughtful techniques to drive accountability, we enable others to step up to the plate as leaders

As we institutionalize these practices, accountability becomes less painful and feels like a way to celebrate progress!

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