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Boardroom connection: How aspiring directors can establish the initial contact

Here are some tested and proven tips for board aspirants



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If you are seeking to enter a board as an independent director, one of the advices you would have got from the external consultants was to reach out to those companies or boards in your wish list.

This has been the standard advice we also have been giving too most aspiring directors. Indeed, you must plan to initiate a query to those boards of target companies or non-profits.

The initial contact could be the board chair or the head of the nominating or governance committees. A good advice, yes, but how should you make that crucial first contact? What should you say (or, not say) in your initial reach out for a board position query?

Here are some tested and proven tips for board aspirants:

- As with other aspects of a good “board wannabe” effort, knowledge is definitely the key. That initial contact is well down on your list of board-targeting activities. Start by profiling companies that interest you and match your skills and expertise. What are their revenues, competitive status, recent history and challenges? Who are their leaders,

both in management and the boardroom, and how much can you learn about their background? You will need to show that you have done some research when you connect with them. Since a smart onboarding campaign is carefully targeted rather than scattershot, your background collection approach demands a similar focus.

· A board contact from your own personal or business network, of course, is the gold standard, but life doesn't often work that well. Yet networking can still offer real value in making a connection with those board gatekeepers if you work out a degree of separation or two. Look over your own networks for someone who shares a school, interest, career or board connection, and request that person on an introduction. We advise networking your way into an introduction rather than on a blind date. Social networking sites such as LinkedIn are valuable for this. Use imagination here – the more you dig on those board leaders, the more likely you are able to find a “who knows who” link and also uncover a hidden connection you would have never known otherwise. You are both passionate about the same cause or you are alumnae of the same executive education programme of the prestigious university?

· Here's a smart tip for making your initial board essay. Approaching directly a company secretary or legal counsel is a good tactic. These people are employed full time at the company, and are responsible for good governance.

They can pass on your information to the board. This makes good sense – the nominating/governance committee chair, as with most outside directors, will always be distracted, and going through the company secretary for a referral actually makes two impressions instead of just one.

· Now let's look at the outreach itself. If you have to do it cold, it's best to have some level of context. In researching the board members, you would have uncovered background on their activities. Perhaps an article they wrote in an op-ed, a tweet, a LinkedIn post, or just a comment they made on a business topic would be a good starting point for a conversation. Say “Hey, your thoughts on this issue are refreshing” or mention a book or an article that may be relevant to the topic in question. Board members, especially at public companies, are high-profile figures, and will leave plenty of traffic that warrant a thumbs up from aspiring board members.

· The content of the initial message will depend on the factors outlined above, but a few rules apply. Shorter is better than longer notes – 75 words are about right but 50 are better. Lead off with whatever connection you have uncovered – “Our mutual acquaintance so-and-so suggested I contact you...” or “I really liked your perspective in that article...” or “I see we both worked for General Electric...” etc.


Next, write how you are impressed with the strategy at Company X, and would like to know more about their corporate governance plans. Now, deliver your quick, one-sentence skills summary (skills, not job title), and mention your interest in board opportunities. Ask for a potential further discussion.

· That covers the “who” for your board wannabe hat tip, and the message. How about the medium you use? There are some LinkedIn specifics that we will outline in a separate column. Email remains the most common business medium, and that includes board queries. However, at the professional level you are targeting, personal email addresses can be hard to chase down, and these folks typically have staff as email gatekeepers. A telephone cold call is less common today, but might bust through communications clutter. Chances are you will likely go to the director's voice mail, so practise a punchy, 30-second message script in advance. And, don't forget the wonderfully retro approach of mailing a written letter. There is nothing that replaces hand-written note.


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