EXECUTIVE COMMUNICATION TOOL

The Executive WIP Brief

Complete every section before the meeting. Hand it to the executive. Lead with numbers, not feelings. This is a business case, not a complaint.

WHEN TO USE:	Use when you need executive support to: reduce team allocation across projects · dedicate a Product Owner · protect a team from re-absorption · restructure how knowledge workers are assigned to teams. Frame everything as a business investment decision, not a staffing complaint.

SECTION 1 — THE CURRENT SITUATION

Team / Project Name:

Name the specific team or initiative this brief addresses.

Date of this brief:

The date you are bringing this to leadership.

What is the strategic importance of this team's work?

Frame in business terms: customer impact, revenue risk, or competitive position. What are we losing every day this team cannot perform at full capacity?

What structural condition is preventing performance?

Be specific: 'Knowledge workers are split across 4 projects.' 'PO attends 1 of 3 Sprint events.' 'SM is juggling 3 teams.' Name the design flaw — not the symptom.

SECTION 2 — THE CONTEXT-SWITCHING TAX CALCULATOR

Fill in the 'Your number' column for your team. The sample column (6 people, $150K average) shows exactly the format expected. This calculation makes the invisible cost of fragmentation visible to your executive.

What you're calculating	Your number	Sample (6 people, $150K avg)	Unit / notes
Number of knowledge workers on this team	___	6	people on the team
Average fully-loaded annual cost per person	$___	$150,000	/ year
Total annual team cost (people × cost per person)	$___	$900,000	people × cost per person
Number of projects each person is split across	___	3	projects per person
Context-switching tax at this split level (use the reference table below)	____%	40%	of capacity lost to switching
Annual cost of wasted capacity (team cost × switching tax %)	$___	$360,000	/ year — invisible and ongoing

Context-Switching Tax Reference

Split across	Time per project	Switching tax	Net productive output
1 project — fully dedicated	100%	0%	≈ 100% ✓
2 projects	50%	≈ 20%	≈ 80%
3 projects	33%	≈ 40%	≈ 60%
4 projects	25%	≈ 50%	≈ 50%
5+ projects	**≤ 20%**	**60%+**	**≤ 40% ✗**

Source: APA (Meyer, Evans & Rubinstein) · McKinsey Global Institute · Weinberg Quality Software Management

SECTION 3 — THE STRUCTURAL ASK

You cannot suggest a new meeting or mindset training. You must ask for a structural change — an org chart line moved or an allocation percentage changed.

Ask #1 — Allocation change:

Example: ‘Reduce allocation from 4 projects to 1. Current tax: 40%. Projected net gain: +40% productive output immediately.’

Ask #2 — Role dedication:

Example: ‘Free the PO from day job for 6 Sprints — formal role change: 100% PO, 0% day job.’

Cost of inaction — what we lose if nothing changes:

Quantify it: decaying velocity × burn rate × projected time to completion. Example: ‘At current velocity this project costs $_____ more per month than it should and is forecast to finish in ___ years.’

Expected leading indicators within 2 Sprints of the structural fix:

Name specific, measurable signals the executive can verify. Example: ‘Attendance at team events improves. Backlog refinement quality increases. Team members report reduced context switching in retrospectives.’

SECTION 4 — THE EXECUTIVE SCRIPT: FOUR QUESTIONS THAT CHANGE EVERYTHING

At Capital One, the executive team asked four questions that turned a ‘never’ forecast into a launch 6 months ahead of schedule. Use these to guide your conversation — or hand this page to your executive and ask them to ask you.

	The question	How to frame your answer
Q 1	**What is the strategic value of this team’s work?**	*Your answer: ____ Frame in customer impact, revenue, or risk — not feature output.*
Q 2	**What will this project cost us in total?**	*Your answer: ____ Have the burn rate ready. Vagueness loses executive confidence.*
Q 3	**What would it take to do this right?**	*Your answer: ____ Name the structural changes from Section 3. State them clearly. Don’t hedge.*
Q 4	**What do you need from us to make that happen?**	*Your answer: ____ Ask for everything: dedicated team, exclusive focus, executive shield, a specific date.*

“With respect, you already can’t afford the 60% tax you’re paying. The question is whether you want to keep paying it invisibly, or invest it in a focused team.”

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