

## ***Planning an Employee Meeting: Model the future you're trying to create***

- by Karen Todd

Few corporate strategic plans involve doing more of the same thing. For most organizations, the strategies and tactics that have been developed to ensure the organization remains successful, involve change. Most change can be characterized as either technical change or adaptive change. Learning a new software package is considered technical change. If the new software changes the way in which an employee does business, that's adaptive change.

For example, the traditional role of Commercial Bankers in one financial institution was to sell credit products which involved crafting a good case for the credit adjudicators in the Risk Management department so the deal would get approved. The new business strategy called for Commercial Bankers to sell a wider variety of financial products. A credit scoring system was built so Commercial Bankers could enter information into the computer and the system would adjudicate the credit. This system significantly changed how Commercial Bankers would spend their time. While learning the new system was a technical change, the system would only get the desired results if Commercial Bankers changed the way they thought about their jobs and what new interaction they would have with customers.

The reason so many business strategies fail to deliver the expected results is because the change implicit in them is managed as technical change and not as adaptive change. Employees try to work the same way but with different systems and the strategy never delivers what it was intended to. The solution is in recognizing the changed behaviour you need from your employees at all levels in the organization and actively looking for opportunities to help them see the need for the behaviour change by modeling it for them, getting them talking about it, and providing safe, fun forums for practice.

Annual employee meetings provide an incredible opportunity to support the adaptive changes required in your business – not just through the content that's delivered but through who delivers it, how it's delivered and how the meeting process itself is crafted.

Mahatma Gandhi once said, "You have to be the future you're trying to create in the world." When you behave as though the future is already here, you pull employees into that future with you – a far more effective strategy than standing behind people pushing them into the new world.

One insurance company I worked with needed to make a significant culture change throughout the organization. The culture had been one of command control – employees had questions and managers had the answers. But in this service industry delivering an exceptional customer service experience required decision rights to be closer to the customer. Front line employees needed to be able exercise good judgment to ensure they

did “the right thing” for customers using policies and procedures as guidelines rather than strict rules!

A group of cross functional employees was asked to plan the seven annual meetings that were held in various locations across the country. As the member of the senior leadership team ultimately responsible for these meetings, it was my job to support the team in their work. Here was an opportunity to model one of the changed behaviours required in culture going forward – as a leader I would ensure this group of employees understood “why” the annual meeting was important and “what” outcomes were needed. I would then give decision rights on “how” to accomplish that, to this group of employees. I would assume this group of employees had the skills to do the job and by behaving as though they did, they rose to the occasion and delivered!

The group gave me the job of telling the CEO his number laden PowerPoint slides were boring. I also had to tell him *he* was boring when he delivered his presentation and if he did it again, employees would fall asleep! He laughed at the feedback agreeing that he was getting bored with it too!

The team understood that if employees were going to be given the latitude to exercise good judgment in customer interactions, they needed to understand the business context in which they were operating. They needed to understand the key metrics and how their actions affected the business results. The group had a brainstorming session with the CEO and a great idea was born! The senior leadership team would become Star Trek characters talking about the metrics as though they were readings on the bridge’s gauges. Like most insurance companies, we needed to make the shift from being volume/market share driven to being profitability focused instead. Our starship would make the journey from the planet “Volumus” to the “Star of Prosperity”. Our CEO, a movie buff himself, bought a star over the internet and a map of the constellations was sent to us which we proudly unveiled at each meeting!

And within days after the meeting, stars and planets were hanging from the ceilings in offices across the country! Front line supervisors were running contests using the starship journey theme. Employees stopped me in the hall claiming it was the best meeting ever and that for the first time they understood what the business strategy was and what they could do in their job to help us get to “Prosperity”. And they did just that!

As you think about planning your next meeting, think about your job as being the *facilitator of the planning process* rather than as the planner. Think about the following as you determine what’s the right discussion to have and who are the right people to have it with to ensure your organization’s next meeting plays a key role in helping the business delivers on its strategy and goals?

1. What is the business strategy for the coming year? Ensure you understand it completely.

2. Clearly articulate the adaptive changes required by employees to successfully implement the strategy. Describe the changes in leadership behaviour required to implement and support the changed employee behaviours the business needs. Your Senior Human Resources Executive should be a great resource for you and will jump at the opportunity to help you think this through!
3. What can be done at the meeting to kick start both these new employee and leadership behaviours? Think about both meeting content and meeting process.
4. Given the changed behaviours required, who are the right people to involve in planning and running the meeting?

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