Blueprint for

WORKPLACE REINVENTION



A Handbook for Leaders



Pam Ross



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with Lee Vincent



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Blueprint for Workplace Reinvention

REINVENTED WORKPLACE



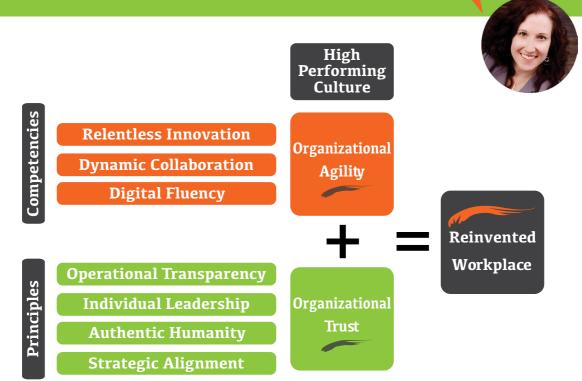
Since 2011, a small group of trailblazers have been bringing workplace champions together in person and virtually to discuss the need for change in the workplace, how to better engage teams and how high performance is achieved.

This handbook is a culmination of thousands of conversation threads that have resulted in a blueprint for workplace

reinvention, with real examples of organizations living this transformation and over 90 tactical actions that every workplace champion can choose from to spark meaningful change.

Written by business leaders for business leaders, this is the why, how and what you have been waiting for to get to better business results... with a more engaged team.

"It is an extremely exciting time in the world of workplace and culture. There are several dynamic forces at play, acting together as a catalyst for leaders to reinvent how we think of work and how we manage people and results. If everyone who uses this handbook implements just a few of the suggested tactics, we can have a great impact on engagement!" ~Pam Ross



Before we get there, though, let's talk about what got us here.

It all started back in the industrial revolution... When factories and mass production were leading the forefront of business, we developed systems for managing work. It was important that workers came to work on time and filled their place on an assembly line. We created supervisors and hourly wages to ensure people were at work when needed to keep production flowing.

Since then, times have changed. We are seeing several factors at work, causing a "perfect storm" of forces pushing for workplace reinvention. Here are a few that stand out.



Factors In The Need For Change

Knowledge work

Today, most of the work we do has shifted to knowledge work rather than physical, manual tasks. Work no longer needs to be a place you go - it is something you do, and with access to information and technology anywhere, most of us can do most of our work from anywhere.

Global markets

We are no longer competing locally, but globally, with massive strides in leadership and innovation being seen in the eastern world. We now compete across the world for customers and talent.

Economic

pressures

Over the past few years, we have experienced massive economic recessions, mass layoffs, and the increasing need to do more with less. Many of us work longer hours as we struggle to accomplish everything on our plates.

The rise of the smartphone

Not only do we seem to be "at" work more, we also spend far more time connected to work in evenings and on weekends - any time that we are not "officially" working. A recent study by the <u>Center for Creative</u> <u>Leadership¹</u>, in fact, reported that those with smartphones actually spend an average of 72 hours interacting with work per week.

Generation Y

By 2025 nearly 75% of the workforce will be made up of Gen Y^2 , a generation that has grown up in a social and digital world and expects a different set of rules for work - the ones outlined in our Blueprint.

Disappointing Engagement... again...

We are seeing <u>depressing workplace engagement</u> <u>trends - nearly 70%</u>³ of employees are either apathetic or downright disengaged with their work. Trust in leaders is on the decline, chronic workplace health issues are skyrocketing, and all of this has a very real negative impact on the bottom line.

Technology

Social, digital and mobile technology is giving us access to tools, resources and each other in ways we have never seen to date. It is changing how we communicate with friends, family, businesses and coworkers. It is changing how we work, when we work and with whom we work. The ability to use technology to some extent to get work done is now absolutely critical for almost all workers.

There are a new set of organizational competencies needed. Organizations must be agile and nimble enough to bring new products to market faster than their competitors. Teams need to innovate their products and services, continuously. Companies with strong, trusted leaders stand out from the rest. We need to develop compelling workplace culture that attracts and engages top talent. These factors differentiate the winners from the rest.

That's where our Blueprint comes in.



It starts with 4 principles – values and beliefs that frame how we operate. When you develop Strategic alignment, Authentic Humanity, Individual Leadership, and Operational Transparency, the outcome is Organizational Trust – a workplace where mutual trust exists. Where employees and leaders are trusted by each other and by external customers. Sincerity and integrity are simply a way of life.

Trust Is Not Enough

In today's fast paced, digital world, you also need to develop 3 core competencies – skills needed to get work done quickly and effectively. Digital Fluency, Dynamic Collaboration, and Relentless Innovation. By developing these competencies across your organization, you become more agile, nimble. This element of Organizational Agility enables you to anticipate needs and rise to meet them, to get to market faster than your competitors, with the best products and services.

The following chapters outline each component of our Blueprint, including:



- Why that Principle or Competency is important today
- How we define it
- Two real examples of organizations practicing that principle or competency with success
- Ten actionable tips for each Principle and Competency real tactics that you can apply in your organization right away
- Pages for you to establish your action plan for reinventing your workplace

As you read this handbook, discuss it with your colleagues. Select some ideas that make sense for your situation. Write them down. Track your progress.

Connect with us, ask us your questions and share your stories of challenge and success as you reinvent your workplace. Visit <u>impact99.ca</u> to learn more.

We also invite you to bring our High Performing Culture assessment to your workplace. Go to <u>Impact99.ca/Assessment</u> for details.

This is a resource written BY business leaders FOR business leaders. Think of it as a spark that might just ignite something powerful around you as you embrace the paradigm shift.

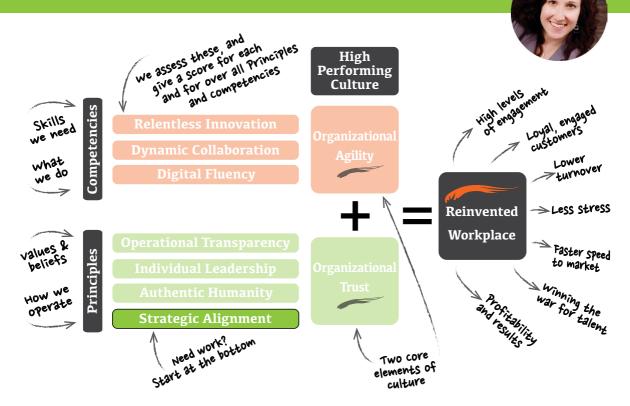
Christine McLeod	<u> </u>	
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Blueprint for Workplace Reinvention

STRATEGIC ALIGNMENT

Principle #1 Chapter 1

One of the key elements in our **Reinvented Workplace model is the** principle of Strategic Alignment, which we have developed as a foundational component to the model. Having a shared vision and We believe that teams aligned purpose for every role makes business sense - not only for reaching the perform better when all organizational objectives, but for motivating moving parts are working employees, as they realize that they are contributing to something more in harmony, aligned to meaningful.' ~Pam Ross common goals that are understood by everyone.



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Defining The Principle

Alignment starts with our leadership teams, as it is important for leaders to define the objectives that set the course for the rest of the organization. Leaders must stay connected and aligned to each

"Show me an organization where individual contributors and executives alike can articulate what organizational success looks like and can measure results daily, monthly, quarterly, annually and I will show you what sustainable high performance looks like."

~Christine McLeod

other, and hold each other accountable for "walking the talk". Social collaboration tools let employees hear directly from leaders via blogs and internal wikis, comparing messages and direction and easily spotting inconsistencies. Lack of alignment becomes instantly visible when messages are inconsistent at altogether)

(or absent altogether).

These connections can come via corporate communications to all employees, as well as individual and team meetings. Once the vision and goals are established and communicated, continued efforts to stay aligned to targets need to continue

through the year. Annual performance reviews are being revamped in favour of frequent performance checkpoints, where managers discuss ongoing objectives, and provide coaching support to help employees solve problems and stay on track. In addition, in fast-paced environments, frequent checkpoints allow for communication of adjusted objectives or customer messaging, which can be picked up quickly by employees in a just-in-time dynamic.

AON Hewitt, in their <u>2012 study</u>⁴ on global employee engagement trends, noted,

"...messages from leadership about business objectives, changes that are occurring, and what is required of employees need to put the employee at the center of the story . . . communications is the primary connection point between the majority of employees and executive leadership."



What exactly is Strategic Alignment?

It's when employees in your organization know exactly where the company is headed, know what outcomes and behaviours are critical to company success, and know what is needed from them in their day-to-day work.

Our Definition of Strategic Alignment

Organizational vision guides decisions at every level. All employees understand the aligned purpose of their role and how what they are doing each day contributes to the overall success of the company. There is a relentless focus on results with continuous feedback and course correction.

Why It Matters

Strategic Alignment is critical for 21st century workforces because of the pace of change organizations require today, continually evolving to meet the dynamic nature of trends, customer preferences, and economic pressures. Teams and individuals need to keep in sync with leadership direction, aligned to meet the required goals.

The pace of change in organizations today requires leadership and workforce agility – the ability to move quickly in new directions, communicate changes instantly throughout the organization, and ensure messaging from the top reaches the front line and vice versa. Customers and employees communicate through a multitude of channels, and our messages must align, no matter who is speaking to customers. The pace requires a leadership style in our organizations that sets clear direction and reconnects frequently to ensure ongoing alignment, allowing teams to move forward quickly and consistently.

It may be important, but we know many organizations are failing to provide the direction employees need.

In their 2012 survey, "<u>Build a Better</u> <u>Workplace: The Employee Engagement</u> <u>Edition</u>⁵", Ipsos Reid and Canadian Management Centre found that,

"Less than half (47%) of Canadian employees feel that their Senior Management Team communicates a clear vision."

This lack of clarity of vision, or lack of any effort to communicate goals and expectations, leaves employees on their own to interpret what's needed from them. Without setting the course for your employees, you'll never get everyone pulling in the same direction to cross the finish line.

Set direction, communicate, course correct; repeat. It sounds straight-forward and consistent with management practices that go back many decades, yet clearly this is an area where organizations continue to struggle. We are so focused on moving quickly, on getting things done, that we forget to take time at the outset to set clear objectives and ensure they are heard and understood.

The Principle in Action: Workplace Examples

We've worked with organizations to help increase alignment, and we know that it takes support from leaders at all levels to define and communicate clear targets and objectives.

Organizations that take the time to keep employees informed of strategic direction and connect corporate goals to individual goals can ensure that activities at all levels stay aligned to the vision.

Here are two examples:

Daily Team Meetings at the Ritz Carlton

The Ritz Carlton hotel chain, based in Atlanta sees the value of continued alignment. The hotel chain's Credo⁶ starts with the foundation that "The Ritz-Carlton Hotel is a place where the genuine care and comfort of our guests is our highest mission." To keep this focus always in the forefront, as featured in this Forbes article⁷, each day at 9 a.m., supervisors and managers at every hotel in the chain, as well as at head office, conduct a 15-minute standup meeting with all employees. It's a chance to hear "wow stories" from the previous day, talk about operational updates, as well as to connect for training. It keeps the entire team aligned and focused on meeting the needs of their guests. Any changes to strategy,

"The Ritz-Carlton Hotel is a place where the genuine care and comfort of our guests is our highest mission." messaging or new information that requires changes can be rolled out seamlessly and at the start of each workday, in every location around the world.





Annual Plan Rollout at Algonquin

Algonquin Power and Utilities⁸, a Canadian power generation and utilities company, has over 1,000 employees working in dozens of locations across Canada and the U.S. At the start of each calendar year, the senior leadership team spends several weeks conducting employee meetings in every location to roll out their annual company plan. Employees have an opportunity to talk about their successes from the previous year, and discuss with the senior leadership team any challenges they face that could impact their ability to meet current year goals.

All employees have their individual goals aligned with corporate goals, and an annual scorecard is tracked and reported quarterly to all employees,

ALGONQUIN Power & Utilities Corp.

"Goals are defined in tangible ways so that every employee understands exactly how their

contributions matter,

and are rewarded at

year-end for targets

achieved."

allowing everyone to know exactly what is required, and determine how close they are to reaching their targets. Goals are defined in tangible ways so that employees understand exactly how their contributions matter, and are rewarded at year-end for targets achieved. Annual goals are also tied to company values, and meeting goals further reinforces desired values and behaviours. This program has been in place for several years, and continues to work extremely well, as Algonquin is seeing significant growth in their value and share price year-after-year.

These examples worked well for these organizations because they fit their culture, meet the alignment goals defined, and resonate with employees at all levels. Let's take a look at other ideas for implementing alignment in your organization.

How To Move It Forward In Your Organization - 10 Tactics



Define your goals and publish them.

Take time to define your annual and quarterly goals, and publish them for all employees. Work with your leaders to ensure that they are setting goals for their teams that align with corporate objectives, and are meeting together regularly. Make sure employees have the ability to keep annual goals in their sightlines, and know how their personal goals connect to helping the organization meet their overall objectives.

Introduce daily stand up meetings.

We have seen this work particularly well for customerfacing teams, but stand-up meetings can work in any function. Daily checkpoints provide an opportunity for your teams to connect and stay on track. Whether informal sales huddles, or meeting each morning virtually via a collaboration tool, spending a few minutes to sync up as a team helps keep everyone on the same page.





Have frequent performance conversations, not just annual ones.

Millennials want frequent feedback on how they are doing, and employees of all generations can benefit from regular input on their progress and performance. Quarterly or even monthly checkpoints help keep corporate, team and individual goals aligned. These don't have to be long discussions – we've worked with teams who have implemented 30-minute monthly checkpoints – but they can be effective for reinforcing positive progress, and reinvigorating enthusiasm for reaching set goals.



As a leader, hold regular one-on-one meetings with your team.

It is critical that you spend regular one-on-one time with your direct reports, to hear how they are progressing against defined objectives, as well as provide coaching for any issues or development needs that arise. These aren't for "telling" your employees what to do; you should encourage employees to set the agenda. Teaching your leaders how to conduct effective one-on-one meetings can help ensure that the time is used to reinforce alignment.

Develop two-way communications throughout the organization via multiple channels. Spend more time listening and coaching than telling.

There are lots of corporate communication approaches for distributing messages throughout the organization, but ensuring that employees have opportunities to provide their input and have their questions answered is needed as well.





Get out in the field.

You can't connect to employees with your message and vision if you can't relate first-hand to their dayto-day realities. Sit in with customer service reps. Visit plant sites. Get out from behind your desk on a regular basis, and listen to the ideas and issues from your staff. Find out what is standing in their way from working towards the organization's vision, and remove roadblocks where possible.

Celebrate success.

Take time to celebrate successes, small ones as well as significant ones. Continue to remind your employees how successful outcomes connect to corporate goals, and what efforts are needed to reach those goals. Encourage leaders in your organization to recognize individual and team accomplishments.





Talk about failure and how to recover.

Acknowledging situations where you were not successful, and how you and the organization recovered from these failures is also part of alignment. Employees need to see that failure is part of setting stretch goals and ultimately help us reach bigger success than we might have thought possible. Knowing how to recover quickly and realign efforts to targets is a critical part of staying on track and ultimately reaching your goals.

Define values, competencies, career paths; what does success look like here?

What does success look like in your organization? What skills are needed, what competencies are central to every role, what behaviours are valued, and how can employees progress? Taking time to define successful behaviours is part of keeping everyone focused on what's critical for achieving outcomes. Successful alignment comes not just from goal setting, but from ensuring that all definitions of success are clearly defined, communicated, and reinforced.





Teach leaders how to stay connected to corporate strategy, and how to lead and manage change successfully.

Far too many organizations neglect leader training, and expect leaders, particularly newly-promoted ones, to figure it out on their own. Investing in training to build change leadership, coaching, and communication skills, is critical if leaders are going to be effective in moving the organization forward.

Strategic Alignment is like

Putting It Together - How This Connects With The Model

the foundation of a house We've included Strategic Alignment as one of with respect to having a the foundational principles in our Reinvented highly effective culture and organization. Everything Workplace model because we've seen how that happens every day, with every employee and every organizations benefit when goals are clearly customer, is rooted in Strategic defined and widely shared. It's a key component Alignment. That's why it is so critical to focus on it as the to building Organizational Trust because starting point in any Workplace Re-invention efforts.' your employees can see the full vision and ~Lee Vincent direction, and feel confident that there is no hidden agenda. When your employees are aligned and working towards the same vision, they can be trusted and empowered more, creating a stronger loop of mutual trust throughout the organization. Looking beyond Organizational Trust, we see strong connections to Organizational Agility as well, as you'll find your teams are able to shift direction more quickly when they understand how it ties to the overall objectives.

What parts of this chapter are most relevant to our industry and business model?	
What business issues are we facing that could be addressed by development in this area?	
Who is the first person I want to talk to about this?	
Why are they going to be excited about it?	

Top 3 tactics I	
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What do I	
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Blueprint for Workplace Reinvention

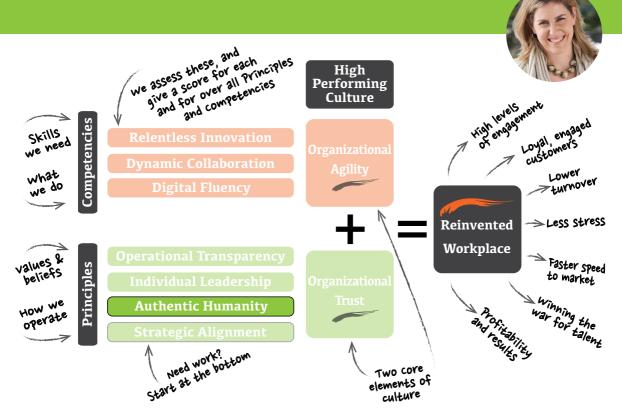
AUTHENTIC HUMANITY

Principle #2 #2 Chapter 2

The second principle in our Reinvented Workplace model is the principle of Authentic Humanity. We believe organizations today need to create an environment where employees are recognized as people first, and not just as assets

in work production. Employees are demanding a person-focused connection, and to be a part of something greater than just their day-to-day tasks. The personal, powerful connections established between employees translates into similar connections being made with their customers as well.

"Corporations and individuals alike have the "outside facing persona" with the "real persona" behind the scenes. Authentic Humanity is about letting go of having "two versions of you", and bringing the real you into everything you do." ~Christine McLeod



Our Definition of Authentic Humanity

Employees have a connection with, and understanding of, the brand's values and personality. They bring their best selves to work and connect authentically with colleagues, customers and community. **Employees relate** deeply to a greater purpose than the "work" itself.



Why It Matters

When we use the word "humanity", we are talking about people as living and breathing human beings. The dictionary includes kindness and benevolence in its definition of humanity, and it reflects the purest elements of what make us human. Yet, many organizations insist on employees leaving their human-ness at the door each day. Managers are told to follow policies, even when unusual circumstances emerge. Employees are expected to put their work ahead of their lives.

If we fail to connect authentically and to make a personal connection, there can be significant consequences for the quality of our work experiences, in the passion and commitment we give to outcomes, and in the quality of interactions with our customers. When our customers say "treat me like a person, not a number", their experience is reflecting the thoughts and emotions of your employees. As organizations pursue deeper connections with their customers through social media, they need to ensure that they are fully connected to their employees as well. As we care more about who our employees are rather than the job title they have or what they do, we will become more caring and nurture authenticity.

...a recent survey by PGI shows that 71% of Millennials want their co-workers to be a second family.

As we look to the very near future, Generation Y, or Millennials, will make up 40% of the workforce by 2014 and 75% of the workforce by 2025. This generation of worker has high expectations about their connections to their workplace. They put less separation between work and life and want to be connected to their coworkers more strongly than past generations. In fact, a recent <u>survey by PGI</u>⁹ shows that 71% of Millennials want their co-workers to be a second family. It is only by encouraging authentic connections that this need can be met.

Why It Matters Cont'd

In 2011, the Ken Blanchard group of companies completed a significant <u>study called "Employee Work</u>

"Nowadays, we spend more time working or connected to work through various mobile devices than ever before. The meaning and purpose people used to be able to find outside of work, through clubs, hobbies, and volunteering, is more difficult to achieve, so the ability to be authentic, and to feel connected to a greater purpose and meaning inside work is even more important."

~Pam Ross

<u>Passion</u>¹⁰", where they found connections between passion for work and overall employee engagement. In their analysis, they determined that doing meaningful work, which they define as connecting to the organization's purpose and working towards significant positive outcomes, is a key element in creating engagement. As we noted earlier in our

definition, it's this connection to a deeper, greater purpose that matters.



The keynote speaker at our 2012 Toronto Impact99 event was Jamie Notter, coauthor of Humanize¹¹. In their book, Notter and Maddie Grant suggest the failings of our workplaces today can be addressed by moving to connect with each other on a more human level. Their model to

help organizations be more human is broad, and shows how more human behaviour in workplaces can have significant business impact.

Companies say "we value our employees" and then fail to recognize their accomplishments...

Authenticity comes into play here because so many organizations fail to walk the talk. Companies say "we value our employees" and then fail to recognize their accomplishments, give them a hard time if they stay home with a sick child or parent, or reprimand them in front of their peers. The "human assets" of your organization are people, and they are worthy of your respect. Customers, too, are looking for the personal side of the organizations they support; they want personal connections to real people who are passionate about their work, and they want to see organizations supporting causes that matter as well.



...doing meaningful work, which the Ken **Blanchard Group defines** as connecting to the organization's purpose and working towards significant positive outcomes, is a key element in creating engagement.

The Principle in Action: Workplace Examples

There are a number of meaningful examples of organizations finding great ways to connect to purpose a work, whether in the work itself or with the communities around them.

Here are two examples:

Project Winter Survival: an Engage for Change Initiative



The Bargains Group¹² is a Canadian wholesaler of discounted family products that has expanded an employee initiative into a significant community program. Over 14 years ago, an employee mentioned the challenges they faced as a previously homeless

person and in particular how difficult it was to get the supplies they needed. A small initiative to distribute goods to the homeless has now expanded into <u>Project Winter Survival</u>¹³.

In 2013, they collected 96,000 items worth over \$500,000 and created 3,000 survival kits which were distributed to 172 homeless shelters. This Project is supported by all employees at the Bargains Group, volunteering their time during work hours including their very passionate CEO, Jody Steinhauer.

For more information visit <u>www.engageandchange.org</u>

Caring is

Caring is Everything at Nurse Next Door In Canada, <u>Nurse Next Door¹⁴</u> provides home-based caregiving services to help seniors live in their homes longer. One of their taglines, "Caring is our talent[™]" connects their business to their employees and the services they provide, and they include "passionate to make a difference" as one of their core values. In ten years, they have established a strong healthcare brand for the compassionate care they provide. Their passion for caring is delivered in all aspects of the services they provide to their customers.

We heard a beautiful story from Nurse Next Door about a Caregiver, who found out that her client had always wanted to travel to Egypt but never had the opportunity, and now was unable to travel. She decided to make her client's dream come true, and surprised her by bringing Egypt to her, with books, movies, and recipes so she could cook Egyptian food for her. It was an incredible way to connect on a deeply human level with a client.

How To Move It Forward In Your Organization - 10 Tactics



Talk openly about the organization's purpose and its interest in helping employees reach their life goals.

Organizations that clearly define their purpose can use it to ignite passion in their employees. Talk openly about your corporate mission – to customers, partners and employees – and use it to rally your team.

Review every policy with an employee-centric filter, and ensure employees are treated with dignity and respect.

In every workplace policy and program, even in disciplinary or other difficult situations, it is critical that employees are treated fairly and with dignity. Examine your workplace programs and policies to ensure that this is the case. Are managers also coached on how to ensure workplace safety, dignity and respect?





Define your corporate values, and work to ensure they are lived every day in your organization.

Increasingly, organizations are taking time to define the qualities and behaviours that matter most, and to ensure their culture reflects these values. Clear values statements can become a roadmap for program and policy development, and a litmus test to ensure everyone is held to the same standards.



Teach managers to meet regularly with their employees to talk about their aspirations and connect on a personal level, beyond the day-to-day activities.

Learn about employees' dreams and passions, and talk about how to incorporate these elements into their work, whether now or as future goals. Regular one-on-one meetings with employees provide managers with an opportunity to connect on a personal level as well. Ask about future goals, whether they have ideas for new initiatives that spark their creativity or passions, or how their work fuels their enthusiasm for a dream or future goal.

Start lunchroom conversations, especially if you are the CEO.

Find new ways to create face-to-face connections with employees, whether between peers or between different levels in the organization. Face-to-face can include in-person conversations or via collaboration technology. If you're the CEO or senior leader, start conversations to learn more about your colleagues beyond their latest project.





Test authenticity regularly via employee surveys and other workplace communication mechanisms.

Including questions on your employee survey about whether leaders do what they say they will do is one gauge of authenticity, and also helps to highlight any integrity and trust issues that may exist.



Use assessments to develop selfawareness.

There are many assessments on the market, and we have seen them have great impact on developing authentic teams and leaders. Using a work-based personality assessment can help people to understand and share their communication styles and strengths. Have all members of your team complete the same assessment and review them together, discussing individual learning styles, challenges, and leadership styles. Sharing your profiles as a team helps people to realize the strengths of conflicting styles and allows for greater authenticity within the team.

Create an environment that integrates work and life.

Work/life integration isn't easy, but without acknowledgement of employees' real-life realities, it will be difficult for them to have enthusiasm for any "higher purpose" elements you introduce. Share in the joys and sorrows in the personal lives of employees. Establish workplace rituals that connect people and become part of your culture.





Join together to help others in need.

Powerful bonds can be created when a group of people works together to help others in need. Whether participating in community events or finding a cause tied to your corporate purpose, connecting to help others is a powerful reminder of our own humanity. Some organizations have integrated community projects into end-of-year celebrations, spending money to help others in need at that time of year, such as food banks, homeless shelters or inner city schools.

Create a storytelling culture.

This is valuable in many aspects. Storytelling helps define corporate culture and reinforce values, but more importantly, to personalize past successes and clarify accomplishments. "What are the qualities needed to be successful here?" Encourage employees to be the storytellers of your organization, with video contests and video feeds to various locations and at town hall events.



Putting It Together - How This Connects With The Model

We've included Authentic Humanity as one of the foundational principles in our Reinvented Workplace model because it is a key element of building Organizational Trust. By acknowledging the "humanness" of each and every employee, and connecting to a common purpose and passion, we are creating compelling workplace environments. These passionfilled organizations become compelling to their customers as well.

"It's when we can bring our true selves to work each day that we shine. Stop wasting energy on pretense, and start connecting with colleagues as real people with real lives who want, more than anything, to have purpose and meaning in their work." ~Alyssa Burkus



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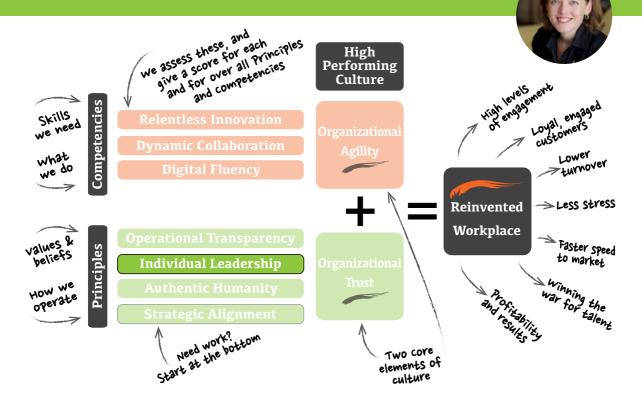
Top 3 tactics I	
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What barriers am I facing?	
What do I	
want to know	
more about?	

Blueprint for Workplace Reinvention

INDIVIDUAL LEADERSHIP



In our Reinvented Workplace model, Principle #3 is Individual Leadership, where employees bring their A-game to work, each and every day. Employees are deeply engaged in their work, looking for opportunities to take charge 'Creating work environments with autonomy and initiative are critical for success in of a situation, or move organizations today. Whether to support agility and significant tasks and projects innovation, or in response to the preferences of Gen Y or forward. This passion Millennial employees, guiding leaders in moving away from micro-managing and towards and enthusiasm creates true leadership will be a key task for HR leaders." a powerful dynamic, and ~Alyssa Burkus organizations see high levels of performance as a result.



Our Definition of Individual Leadership

Employees bring their best personal leadership capabilities to work. They maintain their own reputation and hold themselves accountable to his or her personal objectives. Everyone understands and manages their personal impact on the brand's reputation and success.

Individual leadership translates into high levels of autonomy and self-direction in teams, and a higher sense of ownership, resulting in significant business outcomes.

Why It Matters

When employees take full ownership for their careers and their impact in the workplace, there is a level of passion and enthusiasm generated that exceeds traditional engagement definitions.

Some organizations have defined this as "entrepreneurial spirit", where employees take the initiative to find and implement new ideas and solutions, thinking as an owner and not waiting for instructions. Companies that encourage employees to explore new solutions, as well as help them recover quickly from failure, create an environment of deep collaboration and innovation.

...the "carrot and stick approach" from 50 years ago no longer motivates employees in knowledgedriven economies.

Author Dan Pink, in his book <u>Drive</u>¹⁵, talks about his findings that intrinsic factors such as autonomy, along with mastery and purpose, are the key drivers of individual motivation, not extrinsic factors typically used for motivation in organizations, such as compensation. According to Pink, the "carrot and stick approach" from 50 years ago no longer motivates employees in knowledge-driven economies. Individuals need to be able to lead their own work and set their own agendas, in order to feel deeply connected, passionate and engaged in reaching their outcomes.

It's one of the reasons we are such strong proponents of the Results-Only Work Environment (<u>ROWE¹⁶</u>) framework, developed by Jody Thompson and Cali Ressler. Their model focuses on the key elements of work, driven by clearly defined objectives and outcome, means managers move away from actions and behaviours that are not true drivers of business value, such as emphasizing "face time" and schedules, and provide employees with the autonomy to decide when, how and where to deliver on agreed outcomes.

The Principle in Action: Workplace Examples

There are so many examples in organizations of ways to encourage and reinforce individual leadership for employees, in environments where they act as owners, working with initiative and autonomy.

Here are two of our favourites from Canadian companies:

Life In Canada Depends On Us



In January 2013, Canadian Tire's HR department launched a brand ambassador program called "Life in Canada Depends on Us", where employees are featured in posters describing how they have gone above and beyond to meet the needs of their customers. It has been a huge success, with high levels of ambassador nominations from employees. As a recent <u>Globe and</u> <u>Mail article¹⁷</u> notes, the program is reinforcing the value of taking



initiative to deliver whatever is needed for customers. Canadian Tire is seeing improvements in engagement levels and customer service as a result.

Employees Are Owners

The Canadian airline WestJet takes Individual Leadership into their marketing messaging with their "employees are owners" philosophy. Their model of employee ownership goes further than a tagline, with employees encouraged to be "CEO of the Moment¹⁸" to address customer issues as they see fit. Giving employees full control of a situation not only indicates high levels of trust of the employee, but gives them an opportunity to demonstrate their leadership capabilities. WestJet's reputation for extraordinary customer interactions and passion for their work is well-known, and creates a unique experience for their passengers.



How To Move It Forward In Your Organization - 10 Tactics



Encourage employees to take initiative for pursuing some of their own projects.

Leaders should be continually looking for ways to encourage employees to bring new ideas forward or take projects in expanded directions. Not all organizations can give employees 20% of their time to devote to their own projects as Google does, but encouraging employees to "pitch" new ideas or solutions, with analysis regarding predicted results, can lead to interesting new innovations.

Teach managers to lead through coaching and reinforcement, not through micro-management.

Managers need to listen more than they tell, and coach more than direct. Employees will feel a stronger sense of ownership for achieving outcomes as a result. It is easy to default back to "command and control", particularly during periods of stress, but managers who coach and mentor support the development of decision-making and other leadership skills in their employees.





Communicate annual corporate and team objectives, and report on progress.

This ties back to our principle of Strategic Alignment. Individuals won't be able to own their own objectives if they are unclear of annual targets, or don't receive regular feedback on progress. Establish processes to connect individual objectives to annual corporate goals as well. (See #8)



Celebrate employee initiative privately and publicly.

We've seen lots of organizations who fail to "walk the talk" when it comes to celebrating achievement and initiative. Get creative in your recognition efforts or use new social collaboration tools, and involve senior leaders. Establish channels to "listen" and capture public acknowledgement in your HR processes as well.

Hire employees who have demonstrated entrepreneurial passion in previous work.

Go beyond the typical interview questions to really uncover an individual's entrepreneurial examples from previous jobs. Ask for examples of where candidates can articulate challenges they faced in getting approval to pursue their idea, or situations where they handled uncertainty or felt compelled to go "against the grain", and had to use data analysis to uncover the right course of action.





Share team and individual objectives.

Allow employees to develop and share their individual and team objectives. An online social performance management system can help you do this and keep performance and objectives top of mind. Look for a technology that allows people to set goals and timelines as well as check ins. These platforms often allow employees to share objectives publicly, privately or just with their manager. You will also want a system that enables employees to assess their own performance in a simple online form. Giving people more control and visibility of their performance allows them to lead themselves more effectively.

Give employees broader access to contribute to customer-facing social media channels.

Organizations that provide broad access for employees to represent them via social media expand the corporate voice beyond a typically small number, and provide customer-facing opportunities for employees to build their problem-solving and leadership skills. Being the voice of your organization requires high levels of trust, and employees will undoubtedly step up to the challenge.





Establish a Results-Only Work Environment ("ROWE") with clearly defined objectives.

A ROWE means managers define what work is completed, but not how it is done, giving employees a broader mandate for ownership of outcomes. As we mentioned earlier, we are supporters of the ROWE model because organizations are able to develop strong individual leaders who deliver consistent, measurable results for their organizations.

Provide opportunities for employees to lead activities, projects or colleagues early in their career.

Early access to leadership opportunities provides employees with a manager's perspective much sooner, and expands the company pipeline of leader talent. You'll find that employees embrace a deeper level of ownership when they are able to lead a project they initially suggested.





Provide training to employees on how to build stronger accountability, responsibility and ownership for success in their work.

Training for individual leadership can take a number of forms, and provides clear support from the organization for the desired behaviours. Get creative with it – have a contest for completing modules, or create a multimodule simulation that combines eLearning with on-thejob project work.

Putting It Together - How This Connects With The Model

We have included Individual Leadership as one of the foundational principles in our Reinvented Workplace model because we believe strongly that autonomy and self-directed work are key elements in building Organizational Trust. When employees feel trusted by their managers and leaders to define their work, manage their schedules and deliver value to customers, organizations and their employees can realize limitless possibilities as a result.

The manner in which each of us conducts ourselves has a huge impact on how others feel about themselves. With this in mind, leadership be<u>comes</u> less about title on a business card or org chart and more about a frame of mind."

~Christine McLeod



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Blueprint for Workplace Reinvention

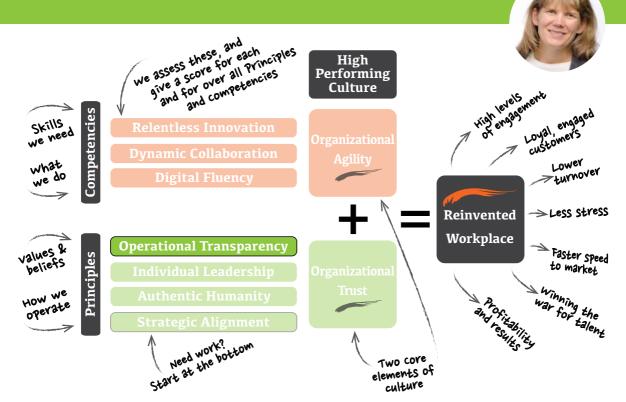
OPERATIONAL TRANSPARENCY

Principle #44 Chapter 4

As you work through our Re-Invented Workplace model to build Organizational Trust and Agility, Operational Transparency is the final trigger to developing Trust before moving into developing

the competencies for Agility. Once you have an aligned team of employees who are connected with the purpose of the organization and are accountable for their own work and reputation as well as how they affect the company as a whole, the ability to share and find information openly and easily is the final element to building Trust.

"Operational Transparency comes from a place of truly believing in the capabilities and capacity of your team. It is the ultimate in empowerment by believing that people will make the right decisions when they have all of the information, not just what has been filtered through the traditional "need to know" approach. It frees up leaders to focus on strategic issues." ~Lee Vincent



Our Definition of Operational Transparency

Employees access current organizational knowledge unhindered by hierarchical or departmental silos. Employees make more operationally sound decisions with access to the information they need, when they need it. **Information flows** frictionlessly and curiosity and discovery is encouraged.

Why It Matters

In this information age, there is an increased need to capture intellectual property. The knowledge that people hold is critical to business success. While in the industrial age, the focus was on process and mechanics to get work done; today, knowledge capital is a key strategic advantage.

When employees do not have access to the information they need, they are not able to make decisions quickly or accurately. They often spend extra time researching or searching through reports and files to find the information they need to get their work done.

In their 2013 <u>The Digital Workplace whitepaper</u>¹⁹, Infocentric Research found hidden costs of \$14K per employee per year from poor information and gaps in its flow, including:

• 70% of customer agents lack the information they need

• 63% of managers make critical decisions weekly without being fully informed and 40% of decisions are made with wrong information

• More than 50% of information needed is not searchable

If there have been times at work when you thought, "I wish I had known that", after spending hours on a project that someone else had already completed, or hundreds of dollars to subscribe to a publication that a colleague already receives, you would have benefited from greater Operational Transparency. It is easy, when an organization is small, to keep everyone informed about what each person is working on, and to share knowledge and information. When a company grows or is dispersed geographically, access to information becomes a lot more difficult. Technology today makes it easier for organizations to make information accessible to everyone, and to create efficiencies by increasing transparency.

With technology today, there are so many ways to be able to create unrestricted knowledge share. Internal social technologies offer a place for employees to share and collaborate on documents in real time, and to post and search for information quickly. Even more traditional intranets, if set up effectively, can be a quick source of good information. The key is to allow all employees to be able to share and post as well as search and find, within reason and privacy constraints. Keeping the privilege of access narrowed to only the few can interfere with autonomy and delay productivity and decision making for all.

The Principle in Action: Workplace Examples

We have experienced first-hand the impact of barriers to information access, and the challenges that they create for organizations and employees. Here are two examples where companies have taken significant steps to ensure open access to information.



Open Company, No Bullsh*t

At <u>Atlassian</u>²⁰, a global software company with more than 400 employees, one of their core values is "Open Company, No Bullsh*t". Information is public by default. They use Wiki technology to allow people across their organization to share with their colleagues globally. They make the wiki a part of employees' life at work on day one by having them blog about themselves. Senior leaders share information and encourage everyone to use the wiki to share and find information. This practice has become a large part of their business as well, as they sell their Confluence wiki system to their clients worldwide, with over 9,000 organizations using it.



Financial Transparency

<u>Whole Foods²¹</u> supermarkets practice democratic leadership, from having employees vote on new hires, to allowing teams to experiment with new lines of business without asking for permission, to open book financial management. This is where the operational transparency becomes quite clear. They share sales, product costs, <u>wages and salaries²²</u>, and operating profits across each of their stores, so that team leaders can make the best decisions on product ordering, performance management, merchandising practices and more. They have been doing this since 1986, when CEO John Mackey got tired of people postulating about how much money he and his senior leaders made, and decided to open the books. Whole Foods has found that the novelty of knowing everyone's salaries wears off quite quickly but people are quite interested in sales, profitability and product information. With this knowledge, they are able to increase their team's sales per labour hour, and that is reflected in their bonus. By being completely transparent about sales for each store, department, and team, employees can learn best practices for their own team and make the entire chain more profitable.

How To Move It Forward In Your Organization - 10 Tactics



Hold daily huddle or scrum meetings.

This form of a quick, standing meeting has become very popular, particularly in the tech world, where organizations need to be extremely agile. These meetings are best when held at the same time every day, for a specific amount of time (usually 7-12 minutes). Ask everyone to share what they accomplished yesterday, what their goal is for today, and what is standing in their way. By answering these three questions, the entire team is kept up to date on what everyone is working on and is able to help each other resolve issues quickly.

Share the true financial impact of decisions.

When investments are made, take time to share how much was invested and why the decision was made, and then track and communicate the outcome. When team members or managers have budget requests, train them to explain in financial terms how it will pay off, as well as to track the impact and share results with the rest of the team. Learn from successes and failures, and build a database of examples for future use.





Use social technology to share information.

Enterprise social technology and intranets offer the option to have employees post information. Any time you are asked a question more than once by email or in person, you are wasting time and there may be others who are unsure who to ask or just not confident enough to ask. Post answers to frequently asked questions on social technology so that everyone can access the information when they need it. Make sure you "tag" your answers so that they are searchable (See # 8).



Explain how the work connects to the whole.

Often, people are given a task to do without the full context of how it fits into the greater whole. An IT employee asked to fix a technology problem on a colleague's computer, prioritizes that in the list of other tasks he or she has to do, without knowing the full context. Perhaps that employee's computer is needed for a critical client presentation to that afternoon, or it holds information that the rest of the team needs to get their work done. An administrative assistant may be asked to book a meeting for the CEO, and without knowing the reason for the meeting, may book it much later than it needs to be. By simply being more open and transparent about the full situation, people are able to make decisions that will benefit the entire company.

Reduce the amount of "local" space to save info.

Oftentimes, people save all documents and information on their own local computer, or in emails, when a lot of this information could be more effective if shared widely across the organization, on an intranet or wiki site. By reducing the amount of space people have to save locally, you can encourage them to save things on the network, so that others can access knowledge to help them do their jobs. Challenge individuals in your organization to get to zero local space on individual computers.





Put people in cross-functional teams.

The more access people across departments have to each other, the more they will get used to sharing information. The relationships built during project teamwork lead to trust and further transparency. Evaluate the projects your team is working on now. Who do they impact? Who might have information that could help? Build teams based on these things for added input, support, and buy in, and you'll also see an end result of greater transparency and information sharing across teams.



Hold "AMA" or "Ask Me Anything" sessions with senior leaders.

Reddit, a social networking site, is quite famous for these sessions. In fact, President Obama held an "AMA" session leading up to the 2012 election, where thousands of people asked him the questions that were on their minds, and he answered them online. Google holds weekly meetings in which one of the founders answers questions from employees. Any question can be asked, and they use technology to post all questions and allow employees to "vote up" the one that they would like to hear the answer to.

Create "logic" within your intranet.

It is great to post all kinds of information, but it is wasted space if the information can't be easily found. When starting out, have a cross-functional team brainstorm the types of things people will share, and determine what the search terms might be. Create a tagging system and share the parameters and thinking behind it with everyone. The more consistently similar information is tagged, the simpler it will be to find it when you need it.





Knock down walls - literally.

In many workplaces, organizations are creating open office environments. The physical removal of walls between individuals, departments, and hierarchy organically creates a more open and transparent culture. If you're worried about noise or privacy, using background music mixed with white noise helps to mask conversation, and having several meeting rooms provides a place for private, sensitive conversations.

Plan and prepare for tough questions.

As you start to use and embrace new social enterprise technology, it is important to be prepared for the questions and comments that may be asked in this type of forum. Often, employees may display a new form of courage when the keyboard and screen of their computer is between them and the person answering the questions. Before rolling out this sort of forum, brainstorm the types of concerns that may come up and prepare for how you might deal with them. If your goal is to become more transparent and to build trust, it will be critical that you do not hit the "delete" button when people ask honest questions or challenge others respectfully.



"As organizations grow, silos

Putting It Together - How This Connects With The Model

often form around the different The underpinnings of trust already work functions. These silos create tension and often lead should be quite apparent before an to non-productive behaviour. When an organization can organization can start to practice set up systems for sharing information more openly, they Operational Transparency, but can combat this silo effect and achieve greater engagement and this principle is a significant part productivity. ~Pam Ross of demonstrating and building an organization of trust and trustworthiness at all levels. Operational Transparency acts as a bridge, bringing trust to its full potential, and moving an organization towards building the competencies of Organizational Agility as people are able to make faster decisions when the information they need is at their fingertips.

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What do I	
want to know	
more about?	

Blueprint for Workplace Reinvention ORGANIZATIONAL TRUST



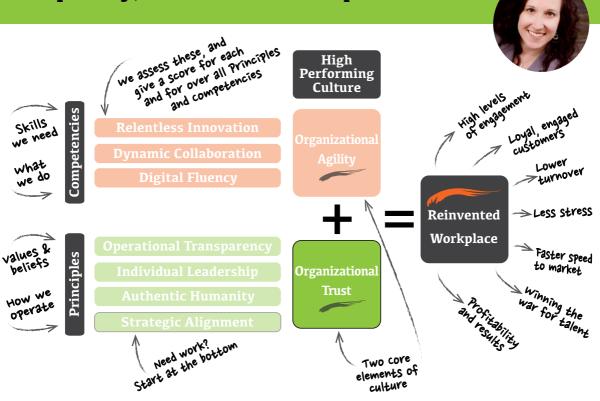


We have identified Organizational Trust as critical to high performance and to success. We have seen organizations attempt to implement various programs - work from home initiatives, social technology to collect feedback, collaboration platforms and more - but time and time again, without a strong culture of trust, these programs do not seem to have the fortitude to make a positive difference in results, and they often fail. That is why we believe trust

comes before Agility. You must build trust if you want to get the biggest return on other programs. As for how to build trust across the organization, as we dug deeper into the actions, beliefs, and experiences in those businesses where trust was apparent, we found that Organizational Trust is actually an outcome of developing Strategic Alignment, Authentic Humanity, Individual Leadership and Operational Transparency, as shown in our Blueprint.

"I believe that trust is the core to developing relationships and to building strong culture. When we start working from a feeling of mutual trust, people feel like adults and are free to do their best."

~Pam Ross



Why It Matters 💋

We have highlighted Organizational Trust as essential to reinventing the workplace and creating a high performance culture. As important as it is, surveys and studies are showing that trust in organizations is hitting all time lows in recent years. Consider Enron's accounting scandal in 2001, Freddie Mac's misstated earnings found in 2003, Lehman Brother's hidden loans leading to their bankruptcy in 2008, and the largest Ponzi scheme in history with <u>Bernie Madoff²³</u>, which was uncovered just months after the economic crisis of 2008 hit. It is plain to see why people are more and more skeptical of organizations and leaders.

In the <u>Edelman Trust barometer</u>²⁴, trust in CEOs was seen to plummet from the previous year by 12 points to only 38%, while trust in regular employees and peers have both risen substantially, to 65% and 50% respectively. Social media is knocking down the walls between companies and the public, providing a forum for customers and employees at all levels to share their thoughts. This makes trust within organizations even more essential to success, because what your employees and customers say about you represents your brand to the world.



Trust is not only critical when dealing with customers, but also in developing high engagement and productivity within organizations. In the 2012 survey "<u>Build a</u> <u>Better Workplace: Employee Engagement Edition</u>²⁵" by the Canadian Management Centre and Ipsos Reid, 61 per cent of Canadian employees indicated that they don't trust their senior leaders. Trust has a significant impact on organizational performance. When employees are trusted, there is less time spent micro-managing processes. When leaders are trusted, there is less gossip and counterproductive discussions. When customers trust a company, they make faster purchasing decisions. As such, trust across, within and about organizations is essential to optimizing results.

Our Definition of Organizational Trust

Employees at all levels are trusted to speak and act for the good of the organization and they behave in a trustworthy fashion. Employees trust that they can respectfully challenge ideas and practices for the overall good without penalty. Sincerity and integrity is demonstrated daily in actions and conduct.



Developing The Core Element Of Trust

When you start with aligning the entire company on one strategic vision and shared goals and values, you create a common playing field for people to play their various positions on, knowing the direction of the goalposts and what is in or out of bounds. We call this Strategic Alignment.

When people fully understand the purpose of the organization, they are able to connect to it authentically and to bring their

and to bring their best selves to work to fulfill their role. That is what we call Authentic Humanity.

When people are committed and connected, they are able to hold themselves accountable to meeting their objectives, and they are more vested in the reputation of the company and how their actions are reflected in it. This is Individual Leadership.

People genuinely want to see the company and their team members succeed, and they realize the importance of sharing information to help each other do their jobs. We call that Operational Transparency.

When each of the principles in Chapters 1-4 are developed, unhealthy competition fades away as everyone is aligned, connected with, and vested in the same organizational goals. When you are able to meet all of these principles, Organizational Trust is developed.

We believe that Organizational Trust must exist at least to some degree in order for Organizational Agility to develop. That is why the foundational elements to reinventing the workplace are the four factors that help to build Organizational Trust - Strategic Alignment, Authentic Humanity, Individual Leadership, and Operational Transparency.

WORD. It only has value when someone gifts it to me and says to me or acts in a certain way that says "I trust you". "You are trustworthy". As leaders, employers, parents, teachers, friends we don't have a right to say "I am trustworthy". Other people will decide if we are by the manner we conduct ourselves."

"Trust is what I call a GIFT

~Christine McLeod

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The Principle in Action: Workplace Examples

We see many examples of organizations taking small steps towards building Organizational Trust, but not many who deeply embrace the concept and show their employees unwavering trust in their discernment and decisionmaking abilities. Here are two great examples of deep trust in the workplace:



Nordstrom: Use Best Judgement

Nordstrom²⁶, an American upscale fashion retailer soon to enter Canada, is famous for the trust they put in their employees to use their best judgment. Their 75-word handbook is legendary. For years, all new employees were provided with their policy handbook, which was a 5 X 7 card which explained:

"Nordstrom Rules: Rule #1: Use best judgment in all situations. There will be no additional rules. Please feel free to ask your department manager, store manager, or division general manager any question at any time."

Now, Nordstrom's handbook contains several other legislated policies, but they continue to trust their employees to do the right thing for their customers, with that simple rule as the focus. It will be interesting to see how this trusted culture will continue in Nordstrom stores in Canada.



The Principle in Action: Workplace Examples cont'd

"Trust and personal responsibility in all relationships"





IBM: Social Trust

At <u>IBM</u>²⁷, "Trust and personal responsibility in all relationships" is one of their core values. One of the ways they demonstrate this is through social trust and the open use of social technology. For example, any IBMer can blog and post through <u>IBM's blog feed</u>²⁸.

"...in 2005, they removed the approval process and opened the blogging to all 300,000+ employees globally."

When IBM first entered the social technology world, blogs and content were moderated and approved, but they quickly realized this slowed things down and that people were less engaged in the process when they knew their content had to be approved. When IBM published their <u>Social Computing Guidelines²⁹</u> in 2005, they removed the approval process and opened the blogging to all 300,000+ employees globally.

How To Move It Forward In Your Organization - 5 Additional Tactics

Organizational Trust is built organically when you focus on developing Strategic Alignment, Authentic Humanity, Individual Leadership and Operational Transparency. There are some ways that you as an individual can build personal trust, giving you a kickstart in increasing the overall trust in the Organization. Here are five ways to get started:



Open yourself to feedback from your team and customers.

Leaders should share their own personal strengths and weaknesses, and watch their behaviour for reactions that may injure trust. In Edelman's Trust Barometer, "listening openly to customer needs and feedback" was identified as one of the number one ways to build future trust. Whether you are a leader in title or not, receiving feedback you disagree with can be emotional. Focus on listening with empathy and curiosity rather than from a more personal perspective. Use words like "tell me more" to probe and fully understand where the feedback is coming from without asking defensive questions like "What do you mean by that?". When someone has the courage and cares enough to give you feedback, there is a reason they are feeling the way they do. The more you understand, the better you will be able to move forward positively, building trust and openness in the process.

Show confidence in others.

As leaders, we often answer quickly or jump in to help our teams. When you silence your urge to help, it shows confidence in the abilities of those on your team, treating them as skilled, competent associates. Ask questions and allow them to solve their problems rather than solving them for them. It will not only build their trust in you but also their trust in themselves.





Keep even small promises and commitments.

This seems like a no-brainer, but in a fast-paced world, it is possible that leaders have conversations quickly and may find themselves agreeing to things before fully thinking them through. Watch for over-promising and under-delivering. It is a sure-fire way to break trust. Things like making an appointment with a team member and being on time and focused, making a decision on something and following through on it, and offering assistance and then following up to provide it all may seem small and simple, but they go a long way towards building trust.

Consider the self esteem of others.

When giving feedback, consider the person's self esteem. Keep the feedback focused on what was said or done, rather than about who said it. Listen to their point of view and value what they say, even though you may not agree. Watch out for feedback such as "you have a bad attitude" or "you are not a team player", and instead look for the actions that give you that perception - such as "I noticed that you haven't been interested in joining the team for lunch lately," or "your work has been late and not as accurate as usual".





Listen with empathy. Reserve judgement.

It is often a leader's natural style to react with a solution or an improvement on an idea. Trust is built through listening and empowering, so bite your tongue, listen and try to put yourself in the other person's shoes. Employees need to feel that they can trust their bosses to be non-judgemental about their ideas, and leaders need to trust their employees to work on their own, without micro-managing. Wait to respond, and remember tip #2.

Putting It Together - How This Connects With The Model

As you build the principles from the 'Trust takes years to build and seconds to destroy. foundation up, Organizational Trust Leaders must always be mindful of this, or it will begins to become apparent both internally become impossible to have employees fully committed with employees and externally with to the success of the vour customers. This sort of trust and organization." ~Alyssa Burkus trustworthiness at all levels is a game changer in a business world where so many are questioning motives of corporations, leaders and media outlets. If you can stand out in the crowd as a trusted provider of services or products and establish a trusting workplace where employees are empowered and able to do their best, you will be far ahead of the competition. Organizational Trust also lays the groundwork for becoming agile, which is absolutely critical in our world of constant change.

"Believe in the adage

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Blueprint for Workplace Reinvention

DIGITAL FLUENCY

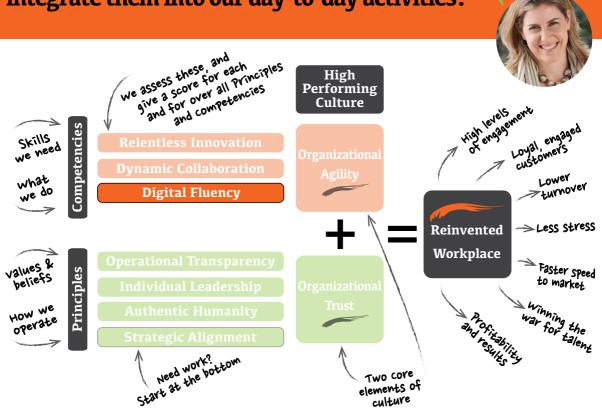
Competency## 1Chapter 6

As we move upwards in our Reinvented Workplace Model, we begin to look at key competencies needed for building Organizational Agility. With a solid foundation of Organizational Trust established and nurtured by the principles of Strategic Alignment, Authentic Humanity, Individual Leadership and Operational Transparency, we can start infusing new competencies into our culture

which will help us become more agile as an organization. Competencies are defined as the skills, knowledge and behaviours needed to build strong capabilities at all levels of your organization. We start with Digital Fluency, which is the degree to which we are comfortable with workplace technologies and are able to successfully integrate them into our day-to-day activities.

"Being fluent in all things digital helps me move seamlessly between virtual and face to face. As a business leader, that is invaluable That integration has allowed me to access knowledge and networks more quickly and accurately. For me, it's not something I DO, it's become HOW I get things done."

~Christine McLeod



dF

"In the past few years, social media has revolutionised the way businesses interact with customers. making it easier to market new products and maintain a brand's image.³⁰"

~Richard Branson

Why It Matters

Organizations with a high percentage of their workforce fluent in a range of technologies, from social and collaboration tools, to data analytics and reporting, as well as website development tools, are the ones that will be able to move more swiftly, in a more agile manner both in the marketplace and inside their organizations as well. Employees and managers with high Digital Fluency (or what some call "Digital IQ") are quickly becoming a competitive advantage, with their ability to conduct business in a digital environment and to manage a large volume of big data from inside and outside the organization. Even at fundamental "literacy" levels, organizations can start to realize gains in these areas.

"It is no wonder that those firms that have a better Digital IQ can deliver and innovate in a world where the rapid pace of technology is fundamentally reshaping global commerce.³¹"

~Chris Curran, Chief Technologist, PwC

In a social business world, the relationship customers want with businesses is changing, including how they want to converse with them. For employees, the competency of Digital Fluency is important for business conduct, relationship development, risk assessment and conflict resolution in this new business climate. If employees at all levels are the life of your brand, then their ability to represent the brand values and raisond'etre online is critical to executing your greater organizational strategy and purpose.

Why It Matters cont'd

"Digital Fluency is based on a culture of learning and innovation. The global pace of change is so high that workforces need to continually learn and adapt to be successful. A foundation of Digital Fluency across the organization results in higher levels of responsiveness, collaboration and customer engagement."

~Lee Vincent

Looking at it from the opposite perspective, having employees or executives who lack confidence, skill and knowledge about how to interact in social business and social technologies is as risky as having employees who don't know how a telephone functions, how to answer it, how to communicate on it or how to use it with

the proper etiquette.

Digital Fluency matters because it means being able to participate fully in not only the future of work (digital workplace), but in our broader global digital society. PWC conducts an annual <u>Digital IQ survey³²</u>, and one of the conclusions in their 2012 report is that for most businesses, there is a growing expectation that digital tools will be used in a business context. In

this survey, PWC found that 56% of CEOs expressed concern that the availability of key skills in this area will potentially threaten the company's growth prospects.

Digital Fluency is the ability to effectively navigate, analyze and create information as well as interact and engage stakeholders in a wide variety of social and digital technologies. It includes the ability to deduce information from big data, use technology to create content or combine other pieces of digital information/data/work. It is the ability to successfully navigate the nonlinear medium of digital space and lastly, to be comfortable interacting in digital spaces and with digital technology, in order to socialize, collaborate, analyze, predict and produce content.

Defining The Principle

Employees at all levels and across all departments are able to research. interact and engage internal and external stakeholders using social, mobile, or other technology platforms. They all understand and follow common principles of business conduct. risk assessment and conflict resolution. Employees are adept and adaptable at conducting business in a digital environment.

The Principle in Action: Workplace Examples

Deep technology skills continue to be a driving force in building a competitive advantage in organizations today.

Here are two examples where we feel they are taking Digital Fluency to new levels and standing out among their peers.



Virgin America





Virgin America recently established a dedicated, interactive <u>website</u>³³ to bring its brand experience to life. At this site, customers can submit Instagram images of their Virgin America experience and post messages and tweets with the hashtag #myVXexperience. The company has also set up a #myVXexperience pinboard on Pinterest to share customer submissions to that platform's audience. When customers are tweeting to you instead of calling your customer care department, your employees need a whole new skillset to feel confident exceeding expectations, resolving conflicts and

solving problems on the spot. They are also doing all of this in a very public forum instead of in the private phone or email conversations most companies still have as the foundation of their communication with customers.

Not only are Virgin employees increasing their digital footprint and strategy corporately, but imagine what has to go on behind the scenes to ensure that they have the Digital Fluency needed to converse in this new manner with customers in a timely, brand appropriate tone.

ImageX Media

Starting with CEO Glenn Hilton, Canadian <u>ImageX Media³⁴</u> is a living example of a social business. The BC web design and development shop (specializing in custom content management solutions) is led by Glenn, one of Canada's top Social CEOs.

Glenn himself has over 26,000 twitter followers and we would give him an A+ for his personal Digital Fluency, but what is most interesting is how Glenn and his HR Manager blend their professional brand and the ImageX brand on social media, easily connecting with employees, customers and industry alike with one voice. Glenn is an example of a CEO who embraces technology to help him improve processes, increase employee engagement and create more high touch experiences for customers and employees alike.

> Since 2012, Glenn and his HR team have challenged existing processes and found their candidate experience was not optimized in

the recruiting process. Quality real time feedback was lacking day-to-day between his team and collaboration was proving difficult as his team expanded. In the past 18 months, the 30-person ImageX team has been able to reduce people process blockages and administrative "busywork", through adoption of social performance management, applicant tracking and talent search, as well as basic

social HRIS. The greatest challenge has not been the initial adoption of these innovative tech solutions, but the change management approach to ensure people are thinking differently and truly integrating the technology day-to-day. For a team of web developers, one could argue Digital Fluency was already high, but re-thinking traditional HR touchpoints like the ImageX team has makes them an organization that is more agile in adapting to the needs of current and prospective

employees.

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In both of these case studies, these organizations already had a culture with high Organizational Trust, and now have sought out technology and social media as a way to reduce communication barriers and become more agile in their response time to both customers and employees. Let's look at some tactical examples of ways you can increase the Digital Fluency of your team.

How To Move It Forward In Your Organization - 10 Tactics



Provide structure without micromanaging in Social Media policies.

Social Media policies range from "always do the right thing", to pages and pages of legal jargon and a lot of "don'ts". Somewhere in between is likely where your guidelines should sit, communicating the why of social media and digital fluency in your organization, general principles, how to escalate issues, tips on how to avoid things going sideways and where people can find out more of what they would like to know. For an online database of social media policies, go to socialmediagovernance.com/policies.php.

Align big opportunity with risk via crowdsourcing.

Where are the big problems and opportunities and what departments have knowledge to drill into the root causes and find creative solutions? Once you know where opportunities might exist, bring a group together for a specified period of time and use new tools (digitally and in person) to discover how technology could make an impact (ie. big data, analytics, infographics, social etc). Share findings with the rest of the organization. It's sourcing intelligence from a crowd (in this case your employees) rather than counting on one person (aka the manager) to have the best answer.





Try Digital Fluency Lunch and Learns.

Launch a "Lunch and Learn" series to increase digital knowledge in new areas. Find social media experts in your organization and ask them to host a lunch topic to share their expertise. Bring in an external facilitator or someone from your digital strategy/social media team to answer questions and teach your team tips such as optimizing their LinkedIn profiles and linking to your company LinkedIn page, how to find content on social media, and how to organize their social activity (e.g. using Hootsuite) to discover sales leads.



Address barriers head on.

Most professionals have three main barriers to adoption with social technology: lack of time (perceived or real), lack of perceived value (ROI) and fear of "failure" (saying something wrong, doing something wrong). Addressing those fears head on and creating a supportive atmosphere to try things helps people see they aren't alone in their concerns or their slower adoption of social media.

Share ideas for smartphone workplace apps.

Productivity Apps. To-do lists. Synched reminders. Interactive apps. By turning your smartphone into a document signer, a content curator, an efficient process tracker, you are becoming more comfortable with operating in a digital world, sometimes without realizing it. Encourage employees to share their experiences with trying new workplace apps.





Allow for unstructured discovery time.

It has been estimated that it takes 10,000 hours to master something. If a full year's work is just over 2,000 hours, it would mean at least 5 years of full time work to become a master of Digital Fluency. While most professionals don't have that kind of time, every opportunity for unstructured down time without guilt for surfing the web, discovering, and practicing is an opportunity to become more proficient. Create opportunities for that unstructured learning.

Find internal champions and build a network of connected influencers.

Usually the departments that have the most at stake (either sales or risk management) will be the most open to trying new approaches and technology if they see them as providing an alternative to current pain points they are experiencing. Do a quick scan of those departments and ask for volunteers who are committed to the organizational vision and to trying new tactics to achieve results.





Replace traditional with social and go "cold turkey".

While it may be impossible to do something as drastic as shutting down internal email in your company, enlist volunteers to try an organized "zero email challenge" for a week (or a day). Replace email with a social enterprise platform (most have free trials). Keep the trial small, low risk and fun. Challenge people's expectations ahead of time, asking "What do you think will happen?". Afterwards, gather feedback - What was great about it? What was difficult? What should we try differently knowing what we know now? Create some "buzz" and broad discussions about alternatives for communication other than phone or email.

Conduct a Digital Audit of your competitors.

If you want to get your team's attention, get them together and make a list of your top 5 category/ industry competitors. Examine their websites and social platforms and get feedback from the team. What do they notice about customer to brand interaction? Engagement? Consistency of content? Tone? How are they resolving conflict online (if at all)? What kind of skills are needed to deliver this experience? Once you've collected this data, go to your website and social platforms and compare notes.





Make knowledge accessible and shareable.

If you have a corporate intranet, share resources and create a FAQ section or forum where people can drop in and explore ideas for adding technology to their day-to-day work. Start sharing content you would traditionally share via email or print in a new way that encourages people to go to the shared site to access it. As we see new uses of social technologies emerge, such as Marissa Mayer holding her Earnings Report via Livestream, people expect greater information online, and we need to ensure that continued access to knowledge is available at all levels, and that employees are encouraged to share widely.

Putting It Together - How This Connects With The Model

Being comfortable adapting to and working in a digital workplace and business is a competency as important as reading and writing. It's the new literacy. Could we get through a workday today without typing an email or listening to a voicemail? This is no different. The platforms will come and go but the speed at which information is travelling all around us will stay and amplify. In our next chapter, Dynamic Collaboration, we will see how the opportunity before us is about tapping into the collective expertise and wisdom of our entire employee base. If this is a direction that inspires us, then we must ensure we upskill our digital fluency and get more comfortable conducting business in a digital workplace.

"So many organizations have realized the power of social media for marketing, PR and recruiting. Where I see even greater opportunity is in developing Digital Fluency throughout your organization to unleash the collective talent of your employees and to engage customers through crowdsourcing, collaborating, and communicating via new technology."

~Pam Ross



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Blueprint for Workplace Reinvention

DYNAMIC COLLABORATION

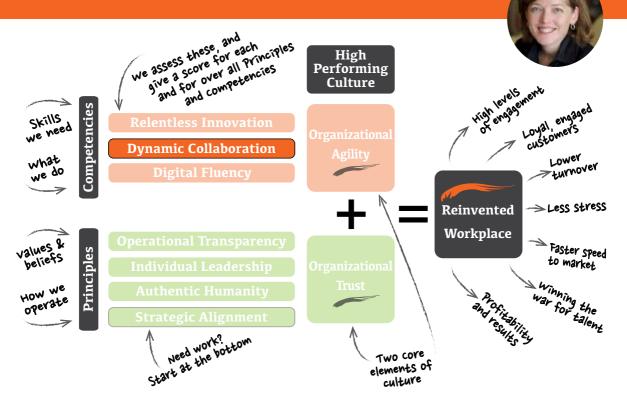


If we desire greater Organizational Agility, the second competency we need individually and as teams is Dynamic Collaboration. Once we have a basic level of Digital Fluency, we can tap into the tools, technology and platforms available to us publicly or at an enterprise level to move towards more integrated ways of working with

each other, with different teams, tapping into expertise and context previously unavailable to us. The future of work is about breaking down departmental silos and hierarchical management models and creating vibrant hubs of dynamic work teams.

"Organizations continue to push employees to do more with less. They need to provide collaboration tools and focus on supporting employees in better leveraging the skills and abilities of others."

~Alyssa Burkus



Why It Matters

We are seeing a trend today where organizations are trying to insert collaborative tools into office environments designed to support individuals working alone in workstations. Guess what? It's not working. Throwing more tools at the problem is not going to fundamentally transform how we work. Dynamic Collaboration works best in high performance work environments with resultsfocused management, built on a solid foundation of mutual respect and trust.

These top organizations pay close attention to (and support) how work gets done and how to break down barriers that exist between individuals, teams and departments to work together to achieve results. While children are quite collaborative, we seem to lose that natural collaboration ability as we become adults. In fact, the way business is conducted for the most part has reinforced the opposite behaviour.

Even the antiquated management language we use shows we still value hierarchical-telling structure over flatter-collaborative structure:

Supervision: I am your "super" "visor", the person with super vision to watch your work

Superior: I am your superior because let's face it.. I am superior to you

Subordinate: You are my subordinate because after all, you are "sub" "ordinary"

Manager: I exist to manage you and your work

And the list goes on

In 2013, the CEB **Corporate Leadership** Council published a significant study³⁵ that found collaboration (which they call "network contributor" - vs the typical "individual contributor" perspective) to be one of the key competencies that contributed to higher levels of organizational performance. In their study, they note "Collaboration will not occur unless organizations enable and encourage broader employee networks connecting employees as needed and providing clear direction, aligned incentives, integrated workflow. and better technology."

What is needed is a new set of competencies to help teams perform in a more fluid, interconnected manner. To better understand how to do that, let's start with defining Dynamic Collaboration.

How we define **Dynamic Collaboration:**

Processes are in place that enable employees across departments to participate, in real time, in projects and discussions where their expertise or perspective adds value or personal engagement. **Teams expand** and contract depending on complexity and timelines.

Defining The Principle

We are learning a lot about collaboration in high performance workplaces. In a workplace with Dynamic Collaboration, title is much less important than what that person is able to contribute and add to the team. Social influence inside the workplace is the new currency and individuals who are dynamically engaged in cross-departmental initiatives tend to score higher in that area. Perhaps most interesting (and most topical given 2013 headlines about "where" people should work at Yahoo, Best Buy and other companies)

is physical proximity and a work environment that supports and promotes interaction. These are essential components of collaboration.

A large proportion

"I love seeing the sparks that come from true collaboration. When people work together on the things they are interested in, they build off each other's ideas, turning thought into action and achieving much more than they could individually. This feeling of being a part of a team, connecting and collaborating with others, fulfills a human need in the workplace."

~Pam Ross

of work today is information work. Studies³⁶ find that companies big and small have employees spend up to a quarter of their time at work searching for information. Those organizations that have figured out how to tap into the collective wisdom and experience of their employees, to break down silos and to all but do away with hierarchy, are going to be those that are going to be successful 30 months

from now and 30 months after that.



The Principle in Action: Workplace Examples



IBM

Our Impact99 HR Summit³⁷ is an example of Dynamic Collaboration in action. Our team is made up of leaders in several different time zones, who in most cases have not yet met face-to-face. We rarely send each other emails and instead communicate, design, build and share feedback on a cloud-based collaboration platform called Sendgine. We

use Google Drive, Skype chat and Google+ Hangouts, build on each other's ideas and have reduced our email by about 50%. Our team expands and contracts depending on where we are at in our planning/execution cycle and we are consistently building on each other's work to create something much greater than what we could do individually.



<u>IBM</u>³⁸ has focused on improving collaboration as they've increased the use of remote work locations in the past few years. Their challenge has been to increase peopleconnection for collaboration in all forms. They continually seek out ways to share expertise, know-how, resources, customer feedback and work effort across lines of business to propel results. This social exchange has become an everyday, all day, activity on a global scale. IBM teams leverage many social-tech tools and collaborative tactics, undaunted

by geography, hierarchy or business function. The path is cut by people interacting with many other people imbued with a new spirit of participation, conversation, community, connectedness and transparency — and this new value is afforded to every person logged in and open to invitation.



How To Move It Forward In Your Organization - 10 Tactics



Start with a team fireside chat.

Get into listening mode and invite small groups of employees to share ideas on how to increase inter- and intra- department collaboration. Vote on the top 3 ideas and implement them in the next quarter.

Create an open communication culture.

Employees at all levels should communicate regularly and openly, regardless of hierarchy. Whether you use instant messaging or intranet boards, ensure everyone has access to the same information and is able to comment and ask questions. Removing barriers to open communication will increase transparency and collaboration.





Promote meetings and peer shadowing between department.

Consider having each department head trade spots with a peer for a shift (or even a week!). Have them debrief with each other, sharing what they learned when they "walked a mile in their shoes", helping to identity collaboration opportunities.

Provide opportunities for employees to choose project assignments or move between projects for specific periods of time.

List big projects and initiatives similar to an emergancy room (in person or virtually). Allow people to select the projects they want to collaborate on and for how long, and they vote with their mouse click. When people work on things they are passionate about and interested in, they are able to work at optimum levels.





Test drive a cloud-based project management platform.

Technology is not always the solution but it can be a powerful enabler for collaboration. Some of the functions you can leverage on these platforms: real time collaboration on documents, including trackable comments and versions; location of tagged content easily in multiple forms of media; live chat; tagging people; dashboards and newsfeeds to stay current and know the score; communities and forums; and external social media integration.

Quantify the financial impact of Dynamic Collaboration in your organization.

Start creating financial impact statements for projects that have been developed through Dynamic Collaboration. How much faster did you find a solution? How sustainable was it? Build a series of "before and after" impact statements to help garner greater buy-in.





Create shared goals.

Shared goals are a powerful tool that encourages and enables collaboration. Let employees help set team, department, and project goals and post them online or on a board where everyone can see them. Seeing the goals every day will keep everyone focused. When a goal is accomplished, cross it off and celebrate. Provide opportunities for employees to regularly discuss progress, road blocks, and solutions. This will motivate and empower employees to work together.



Rethink job descriptions: Start with the end in mind.

Remove the laundry list of tasks associated with job descriptions and create more dynamic, results-oriented accountability. When you start with the ultimate purpose of the role in mind, it becomes easier for other colleagues to support and collaborate towards that ultimate goal. A traditional task-oriented job description might say "answer the telephone," whereas the more useful and motivating the more effective results-oriented job description may say "provide exceptional service on the telephone", focusing on the desired outcome and why the task is important.

Reward collaborative examples.

Host an internal open house event where people can demonstrate and discuss how they use collaboration tools, sharing best practices and new ideas across different teams.

Reward Dynamic Collaboration examples with bragging rights (i.e., a unique trophy, plaque, or something that the team would be proud to showcase) and a team pizza party.

Highlight stories of Dynamic Collaboration (and the results they achieved) in company newsletters or even shareholder reports.

Create the stories that people can talk about as examples to benchmark.





Move some office furniture: Groups of 4-8.

Conduct a 6 month experiment by moving or removing office furniture and putting desks in pods of 4-8. Arrange office furniture to allow for formal and informal gathering spaces. Ensure everyone has equal access to digital displays. In addition to desks facing each other, create areas conducive to conversation without desks in the way. Get creative with groups of chairs/stools, pillows, and a coffee table. Add white boards big enough to collaborate on around the entire circumference.

Get input from the team before, during and after the experiment. Invite the team to share learning with other colleagues.

Putting It Together - How This Connects With The Model

When processes are in place that enable employees across departments to participate, in real time, in projects and discussions where their expertise or perspective add value or personal engagement, something unique starts happening. People start engaging and contributing because a culture grows wherein the group expertise is not determined by title or department but by value of contribution. Not only does the culture recognize the value of diversity of expertise and perspective, its processes and mechanisms actually enable it. With our model, you now have a foundation of Organizational Trust, on which competencies of Digital Fluency and Dynamic Collaboration sit - and on

"Dynamic Collaboration: The root of the word Collaborate is the latin Colaboratus, or "to Labour Together". The figurative sense of Dynamic comes from 1856 (in Emerson) and is about being "active, potent and energetic". Put together, we need to labour TOGETHER to be more potent!" ~Christine McLeod



Digital Fluency and Dynamic Collaboration sit - and only one piece of the model remains to explore - Relentless Innovation.

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Blueprint for Workplace Reinvention

RELENTLESS INNOVATION

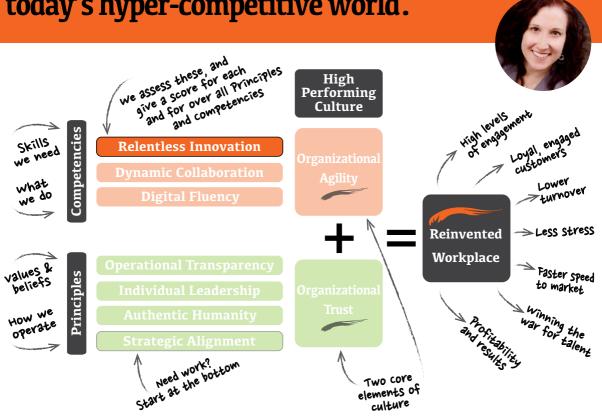


At the top of our model, as the final building block towards Organizational Agility, is Relentless Innovation. The more strongly your organization has developed the principles and competencies that come before this, the more effectively you will be able to build this competency. The ability to innovate is core to your

organization being agile. Seeing upcoming possibilities and being ready to develop a new product or service to meet future needs faster than others is something all organizations need to strive for in today's hyper-competitive world.

"One thing I've learned about innovation - it is not just about having a bunch of great ideas. It is about making sure your idea solves a problem and about being able to make that idea reality. It takes focus and it takes a variety of skills."

~Pam Ross



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Defining The Principle:

Employees are empowered to improve operational excellence and customer loyalty. **Results-focused** ideation and experimentation is encouraged. **Ideas** and initiatives that do not yield impactful results are culled and seen as learning.

Why It Matters

It seems as though everywhere we turn today, there is a new article on innovation, another leader telling us how to be innovative, or an organization being lauded for its innovative products. <u>The Conference Board of Canada</u>³⁹ defines innovation as "a process through which economic or social value is extracted from knowledge through the creating, diffusing, and transforming of ideas—to produce new or improved products, services, processes, strategies, or capabilities." We take innovation to a behavioural and cultural level, outlining what it looks like in an organization and how people act in order to drive the process throughout their work.

We believe that in order to compete successfully in this global and constantly changing business world, organizations must innovate, relentlessly. We are seeing organizations that go against the grain and disrupt conventional ways of doing business succeeding while others are struggling or failing. Companies like Apple, who developed a completely different personal computer experience, or Netflix, who has changed the way people watch TV and movies, or AirBnB, who has innovated the accommodation space, are thriving, while organizations who have failed to innovate are being left behind, or entering extinction.

In the past, innovation was a "nice to do" for your business, but in today's world, consumers have an infinite number of choices and it is becoming exceedingly critical that your organization stands out in the crowd, with different products and innovative ways of serving people.

In recent <u>research³⁹</u> by The Conference Board of Canada, they found that Canada ranks 13th out of 16 countries in their peer group when measured on 21 indicators of innovation. They also found that those countries that are beating Canada in innovation are also surpassing us on income per capita, productivity and the quality of social programs. Clearly, Canadian organizations have room to grow as far as becoming innovative and it will pay off in business results and quality of life.

As important as innovation is, there are some barriers to it in our society. As we go through school, we are taught to sit still, listen and not to question authority. In the process, we teach children not to challenge the norm in an effort to get them to follow rules and behave. Many traditional organizations, with a top-down approach to communication and decisions made by formal leaders, also cause obstacles to having employees innovate. We have a great opportunity to bring innovation back to the core of the workplace, and to nurture that competency in every person in the organization.

The Principle in Action: Workplace Examples

Anixter Brothers Inc.⁴⁰ is an electrical company that started in 1957 and has grown to over 6 billion in sales and a listing on the Fortune 500. They attribute much of their success to their distinct philosophy, and namely to what is outlined in their <u>Blue Book⁴¹</u>. The Blue Book which was written in 1968, explains how people work at Anixter Bros. While it doesn't call out innovation explicitly, one quick look at this unique employee handbook reveals the innovative culture that permeates their company. With a blank page where Organization Charts and Job Descriptions would traditionally be displayed, a policy on cash flow that states "More should come in each month than goes out" and with real and conversational writing throughout, the handbook itself is an innovation, especially when you realize that it was written 35 years ago. By promoting an extremely open style of communication, working through issues together so they can get back to the business and promoting cross-

departmental work through shuffling people regularly, Anixter's has been able to redefine their business and their industry and to be extremely profitable while doing so.

Anixter's policy on "Expressing Yourself": Think, think often, think hard and then say what you think. Feel! Have strong feelings and then express them. And don't get mad when others do.

3M <u>started the practice</u>⁴² of 15% time back in 1948. Everyone at 3M is given 15% of their time to work on something that they came across during their work and were curious about but didn't have time to pursue. In fact, Spencer Silver, an employee at 3M in 1974, developed the Post-It Note during his



15% time. Not all 15% ideas end in huge success and many turn out to be failures, but even when those decisions are made, workers celebrate the innovation and then agree to move on. With this innovative culture, 3M has produced more than 22,800 patents and continues to use 15% time to develop many of them.



Anixter

3M

How To Move It Forward In Your Organization - 10 Tactics



Hire diverse people.

Not just diverse racially or culturally. Hire people with different personalities, experiences, strengths, even different industries. Don't be fooled into only hiring creative people or people similar to you. In order to make innovation stick, you'll need a variety of people with different strengths: those who will identify problems, plan the implementation and engage hearts and minds, as well as those who generate creative ideas. Use personality assessments or try Steve Shapiro's <u>Personality Poker</u> to identify the innovation of various people on your team.

Encourage people to ask "why" and "why not".

Asking questions is critical to innovation, even when questions challenge decisions. Leaders need to be ready to have their ideas challenged and to celebrate it when they are. A company full of "yes-men" will not innovate. Provide coaching to leaders to encourage their teams to ask questions. Leaders need to be comfortable with being questioned. How they react can either encourage questioning or stop it in its track.





Establish a no-blame environment.

Hold people accountable to commitments, conduct and responsibilities, but eliminate blame for well-intentioned innovative ideas that end up not working. Provide employees with a "get out of jail free" card each year for ideas that don't work out. Discuss why they thought their idea was a good one, how it failed, and what they learned. Host "Fail Fridays" where people meet and bring something they worked on that failed and what they learned. Celebrate the learnings and vote on the most informative failure.

Include Innovation as part of your Performance Management process.

Keep in mind that not everyone will be a big ideagenerator, but all have a role to play in the innovation process. They may be the person to define a new problem to solve, to plan the steps to implementation of a new innovation, or to engage the hearts and minds of others in the change or new program. Regardless, everyone should have some element of the innovation process included in their performance objectives.





Provide autonomy.

If employees aren't engaged or don't feel that they can make a difference, they will not innovate. Ask yourself: How much impact does a frontline employee have on how they do their job in your organization? If the answer is "none", there's something wrong. We have seen companies that provided scripted steps of service for their employees. Guess what? Engagement dropped. Innovation was deficient, and the customer experience declined. Remove scripting and "how to" do things, ensure clear objectives and purpose, and then allow employees to innovate how they can best get things done.

Watch your response to new ideas, even when you like them.

Leaders often hear a great idea and have an urge to make it even better, saying things like "That's great. How about we add this..." or "What if we tried..." Their instant response and alterations to the idea may improve the idea by a small percent but also may cause the person who brought the initial idea forward to think twice before doing so again. Recognize the idea, celebrate it, and allow it to permeate before you add your own thoughts to it. Consciously enact a 24-hour buffer for ideas from others to simmer before you add to them.





Provide opportunities for collaboration and crowdsourcing.

Technology and internal social networking tools like Yammer, IBM's connections and Jive allow new opportunities for getting work done. Leading organizations are leveraging software like these tools to collaborate across distance and to increase productivity. Collaboration doesn't have to happen through technology, though. If you don't have that as an option, schedule cross functional brainstorming sessions, breakfasts, and project teams. Blow up the traditional, siloed organizational chart and invite people in other departments who have demonstrated competency or interest in a project to be involved in it.



Develop a Hacking culture.

Hackers often get a bad name, but the true spirit of hacking is about solving problems, breaking things down into the simplest bite- (or byte-) sized pieces, exploring and experimenting. One way of doing this is to have turn an annual meeting into a Hack-a-thon. Have the C-Suite bring a very real, relevant, complex challenge and have employees across the company show up to work on it. It will be important to provide some structure and parameters, but this can be rewarding and engaging for your teams and can help to bring different perspectives to solving real problems.

Provide time for innovating.

Most companies, after years of economic challenges, are lean today. Employees are in a time crunch and often are so task-focused that they don't have time to think or reflect. It's important for leaders to watch for this and to help teams prioritize and plan innovation time, from brainstorming meetings to independent reflection time. Set time aside in calendars for these types of innovation time and check in to see that your team is doing the same.





Innovate your physical office space.

You don't need to add ping-pong tables or slides from floor to floor like some companies have. Small changes can make a difference. Are leaders all in corner offices? At minimum, encourage open doors. Do people have cubicles? Try knocking down the walls. While an open office requires some getting used to, it opens the lines of communication and collaboration. Unique furniture and workspaces can help too - try yoga balls as seats, lounge areas, and add resources like puzzles, inspirational quotes, and mind mapping tools.

Putting It Together - How This Connects With The Model

With Relentless Innovation at the top of our model, once you have developed it, building on the principles and competencies that lie below it, you will be well on your way to creating a high performing culture. You can see how the underlying principles and competencies play a part in making innovation truly effective, from ensuring alignment to providing digital tools and opportunities to collaborate. This final competency really ignites your ability to be agile, to get to market with new products faster, to engage employees in new ways, and to achieve optimal profits and results. When you've worked your way through all

"Organizations that embed the full lifecycle of innovation into their culture – from idea generation through to implementation – have a different vibe to them. There's a strong feeling of momentum and continual movement forward that leads to significant business advantages for those who figure out how to do it well."

~Alyssa Burkus



of our principles and competencies to this final one, you will be ahead of the curve in reinventing your workplace.

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Blueprint for Workplace Reinvention

ORGANIZATIONAL AGILITY

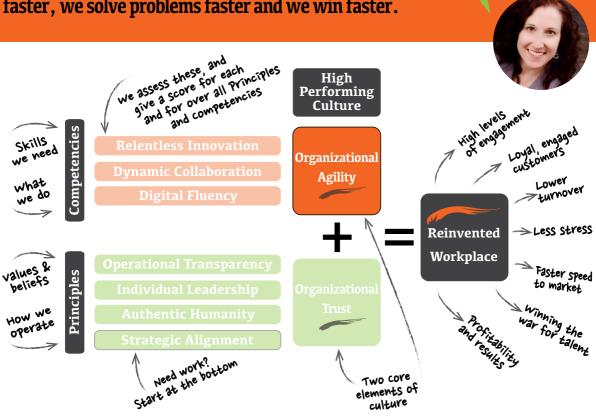




As you have moved through our model for the Reinvented Workplace, you have a better sense of the conditions necessary to achieve sustainable high performance. The big question still remains - why do we need to re-think how to optimize those conditions? Clearly, we are facing, by design or circumstance, unrelenting and largely unprecedented change. We are also seeing that the pace and depth of that change is increasing exponentially.

We believe the three competencies of Digital Fluency, Dynamic Collaboration and Relentless Innovation that we have presented to date are going to help us achieve greater Organizational Agility, and here lies the reason: Using technology for collaboration and innovation allows us to be more adaptable and thrive in a changing marketplace. Quite simply, when we are more agile, nimble and adaptable than our competitors, we react faster, we innovate faster, we solve problems faster and we win faster.

"In a world where the rate of change continues to increase, organizations must be able to adjust quickly to stay ahead. By using technology to harvest and communicate information, developing collaboration as a competency to access the brainpower of your employees, and encouraging the implementation and testing of new, innovative ideas, you can become more agile and competitive in today's age." _________ ~Pam Ross



Why It Matters

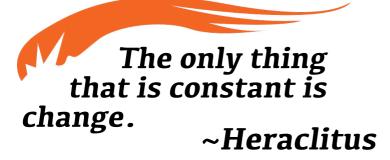
As far back as 2009, <u>McKinsey & Co⁴³</u> reported "nine out of ten executives identified Organizational Agility

"IT and Engineering disciplines have been practicing "Agile" development for years. It's time to apply some of these flexible, iterative, interactive principles to the world of Organizational Development so that we can stop getting "stuck" and start moving towards real organizational culture change." ~Christine McLeod as critical to business success, influencing their ability to achieve higher revenue, higher customer and employee satisfaction as well as having a positive impact on getting products to market."

We live in a world of Change. Our customers change. Their demands

change. Their needs change. The economic climate in which they buy from us changes. How they want to do business with us changes. When they want to do business with us changes. If we could design and lead teams to be comfortable with constant change, faster to identify and respond to change and more capable to access resources to make that change a

reality, would we have more responsive organizations? Would we see less down time? Would we deliver more value and relevance to the customer? Would we see more engagement from our people? We believe so.



Corporations have been designed to be anything but agile and it is difficult to determine to what degree this transformation is even possible in today's corporate world. Small businesses and start-ups are having a much easier time achieving this, but our belief is that within one generation we will see even the largest of organizations either become extinct or evolve to this new culture of agility.

Defining The Principle

Organizational Agility is the ability of a team, department or entire organization to quickly and effectively make change happen. **Agile organizations** anticipate and adjust to changes in the market, their customer needs. emergence of new competitors and the development of new products or services. Individuals and teams in agile workplaces are flexible, adaptable, coordinated and swift in uncovering problems and solutions and in changing tactics to achieve results. They are able to identify risk and capture opportunities more quickly than their competitors.



The Principle in Action: Workplace Examples

"Organizational agility is the difference between proactively stepping into opportunities and being dragged along by a changing environment. Without organizational agility, you are passive passenger to changes, never sure where you will end up. If your organization is agile, you know you can respond to any changes with resilience."

~Jeff Booth CEO, BuildDirect

Build Direct

At <u>BuildDirect</u>⁴⁴, a key value is the idea of improving every day. They are open about the fact that no one is perfect and each day they encounter barriers and challenges. The teams use daily huddles to not only identify what is working, but also what isn't working, so they can figure out how to solve the problem. To CEO Jeff Booth, agility is about responding rapidly and seamlessly to whatever shows up, but also anticipating what might be coming.

One thing that allows everyone at BuildDirect to quickly identify problems and solutions is data. Data tells them what to pay attention to and where to look. And for every barrier identified, they ask what can be learned not who is to blame. The BuildDirect team uses a high performance program called Blueprint to create regular conversations between managers and employees with the intention of diving deeper into how they can create an environment that gives each person the opportunity to excel.





When <u>Bank of Montreal (BMO)</u>⁴⁵ needed to improve productivity and increase revenue, they moved forward with implementing Customer Connect, an award-winning 60 million dollar program which was implemented via agile development.

The program was designed to make it easier for clients to interact with the bank and its various service offerings. It included changes to processes supporting 16,000 employees in sales and customer service roles in performing transactions

such as loans, mortgages and lines of credit. The project was a significant effort and involved employees at all levels to be involved in new ways, from focus groups to supporting process redesign efforts in dedicated teams.



Modeling from agile software development, which implements solutions using overlapping rather than sequential project phases, organizations with high levels of agility know how to identify requirements, create and implement solutions at a rapid, overlapping pace. This allows for "test-and-adapt" ongoing revisions, resulting in optimal solutions for their customers.

How To Move It Forward In Your Organization - 5 Additional Tactics

Organizational Agility builds from the other competencies of Digital Fluency, Dynamic Collaboration and Relentless Innovation. These are not "one time" activities, but need to be embedded into the way you work. Here are five additional tactics that can help you further develop strengths in agility in your organization.



Find the pain in your processes.

Always start with the pain points facing your business. The larger the problem, the more opportunity there is to re-think, re-work, re-invent... and the more likely the solution can be sourced not by ONE person or department but a cross section of departments and teams. Usually departments that have the most at stake (eg., Sales, Risk Management, HR, etc) are good places to start and streamline. Adopting a process improvement approach to systems is a great first step to becoming more agile.

Dialogue vs. monologue: Feedback flows everywhere.

In typical corporate culture, a directive comes from above and flows down and through the organization, or information flows up to the top and then gets shared by a company loudspeaker. The processes and culture are in place to encourage and reward an entrepreneurial mindset and relentless focus on results from everyone. Everywhere you go you see dialogue (conversation between two or more people), you have eyes and ears focused on forward movement and course correction.





Reframe how you think of TEAM: Spiderwebs vs. silos.

Less hierarchy doesn't mean less structure or more chaos. In agile organizations, information flows frictionessly, unencumbered by bureaucracy and administrative process. Knowledge, resources, support and ideas can come from the least expected places. Title is less important than the contribution you make. Add the word interlocking or interactive or interdependent in front of the word team in your department and you will start shifting your perspective.

Relentlessly focus on data.

Moving fast doesn't mean doing so carelessly. Meaningful metrics (not just for the sake of having metrics) and relentless focus on that scoreboard helps keep things moving and allows for new approaches when data intelligence display variances from the norm. At any given time, team members can see micro and macro changes and trends.



Plan for failing fast.

Agile workplace cultures understand that failing is part of the process. Generating a lot of innovation, working with more people, incorporating real-time technology invites more opportunity for success . . . AND failure.

When you start with the assumption that many ideas will fail and make plans for dealing positively with failure, people take more risks and adapt more quickly when they do fail. Planning for failing includes: How do we constantly review processes and change the ones that aren't working? How do we cull ideas? How do we reflect on our success and failures? How do we learn from each other? Success in an agile workplace is the desire and ability to keep moving.

ORGANIZATIONAL AGILITY

Putting It Together - How This Connects With The Model

In our highly competitive, global, fast moving economy, Organizational Agility adds a dimension of high performance which, like Organizational Trust, is a valuable competitive advantage because it is not easily replicable from one company to another. "Organizations need to master agility, and see it not just as a "nice to have" but as a competitive advantage. We are moving beyond the era of "change management" and developing "change mastery", where enthusiasm for rapid assessment and continual change is embedded into every program, client solution and team skillset."

Every year we see more and more "top 100" lists from organizations, magazines and associations highlighting "the most engaged" or " the best places to work", or even "the top revenues". We believe a new benchmark is needed. One that sets a measure of success based on the correlation between business results and high performance culture. You can have a really happy place to work and maybe also be posting good financial results but if your Organizational Trust and Agility levels are very low, we believe those results are going to be short lived. It's the theory of that correlation between high performance culture (our blueprint) and sustained growth that we are setting out to prove.

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ORGANIZATIONAL AGILITY

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ORGANIZATIONAL AGILITY

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Blueprint for Workplace Reinvention

REINVENTED WORKPLACE



Our Blueprint for Workplace Reinvention and this eBook started with a strong passion and belief that change is necessary in today's workplaces.

Year after year, we are facing realities including 70% of employees not engaged at work, trust in leadership plummeting, and skyrocketing stress claims. We have seen thousands of people lose jobs through the recession, increasing focus on innovation from markets like India and China, and the changing composition of the workforce, with 5 generations in the workplace. With all of these factors at play, we believe that it is **time for change**.

"We are in the midst of a seismic shift in the world of work. There is important work to be done and change agents like you are the ones who are going to pave the way. It is our hope that this series has inspired both thought and action on your part and we look forward to you sharing your journey with us."

~Christine McLeod

Technology is revolutionizing the way people communicate with friends, family, companies and colleagues. Technology has always been a disruptor, with examples throughout history of technological inventions like the telephone, the printing press and even the wheel changing the way people lived and worked. The change



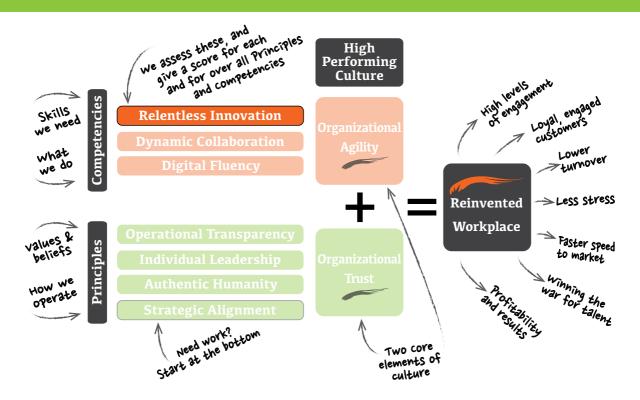
happening with technology today, with social media and mobile devices as catalysts, is stimulating a greater need for reinventing the way people work than we've seen since the industrial revolution. Again, the **time is ripe for change**.

We see great opportunity for those organizations who can quickly adapt and innovate to bring their customers what they need, even before they realize they need it. Those companies who can innovate faster, bringing unique products and services to the market, will stand out among the rest. In fact, **some are waking up to change**.

We have seen organizations implement an "innovation department", employ social enterprise collaboration technology, or adopt agile work techniques like stand up meetings, thinking that these things will drive the change needed to build high performance. We have seen plenty of these initiatives fail and have asked ourselves why? The more we explored those companies who were seeing great success, the more we became certain of one thing:

Regardless of the tools or systems you implement, if you don't have the culture to back them up, you won't realize the full effectiveness of what you're doing.

That's when we realized we had the ability to take our collective experience and the experience from our vast network and create a blueprint for change. A blueprint that was anchored with a belief that Organizational Trust and Organizational Agility are at the core of the ability to be successful now and into the future.



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Throughout the nine preceding chapters of this eBook, we have introduced you to the principles, competencies and core elements of a high performing workplace. We have provided examples of organizations practicing them and reaping the benefits. And we have shared tips on how to get started. Let's review our blueprint for a moment to recap.

We have identified four principles that build Organizational Trust. These principles are values and beliefs that govern how people operate at work, forming the foundation of the types of interactions they have with each other and with partners and customers.



The first principle: Strategic Alignment

Building trust starts with getting really clear on what your strategy is and sharing it across the organization. Strategic Alignment means that employees understand company objectives and how they play a role in achieving them. People

want to feel like their work matters. Developing strong Strategic Alignment helps to ensure this, and forms the foundation of a culture of trust, where people know how they are doing and do not suspect hidden agendas or secret objectives.



The second principle: Authentic Humanity

Once your teams are aligned to common goals and purpose, it is important to allow individuals to connect with their work, each other, and the company as a whole on a personal level. Authentic Humanity is

becoming more and more important as people spend more time at work - or connected to work - today than ever before. They now look to their workplace to provide personal satisfaction as well as a fair wage and an ability to meet basic needs. Organizations that have a greater purpose than profit, where their employees feel that they are making a difference for the greater good, see higher levels of commitment and loyalty from their people.



The third principle: Individual Leadership

If you can provide meaningful work and connection for your teams, they become more accountable for how they impact the organization. They are internally driven to bring their best personal leadership capabilities

to work because they are aligned and connected to the purpose and objectives at hand. They manage their behaviour and actions in the best interest of themselves, their team, and the organization.



The fourth principle: Operational Transparency

When you have an aligned, authentic group of individual leaders working in your organization, they understand how important information is to themselves and to their colleagues. They become more open to sharing

information that can help their teammates make faster, better decisions. Employees are more apt to seek out information about what is going on, so that they see the connectedness between their work and others. That curiosity and sharing helps to knock down any barriers between departments, levels and functions.



The outcome: Organizational Trust

When you are able to develop these four principles in your organization, Trust becomes much easier to achieve. People are more sincere in their words and actions and they behave in ways that impact the company positively. Questions can be asked without fear because leaders and colleagues trust that the intention behind the questions is positive and for the good of the organization as a whole.

Once trust is strong across the organization, you can start to build competencies and skills across your organization to drive Agility. Ultimately, Organizational Agility is the company's ability to make change happen. Without a strong foundation starting with Strategic Alignment, an organization that is too agile may lose its sense of direction and flounder, flexing back and forth as different pressures or demands weigh more heavily on it. Without that strong foundation, it is exceedingly difficult to gain traction in using technology to communicate, collaborating across departments and functions and to innovate the things that will make the best impact on the organization. That is why we recommend developing the capabilities for Organizational Agility after the foundation of **Organizational Trust has been** established.

Just as we have identified four principles that help to build Organizational Trust, we have also found three competencies that, when developed, increase agility in an organization. Let's take a look at how Organizational Agility is built through strengthening your capability in these three areas.



The first competency: Digital Fluency

There is no doubt that technology has changed the way people communicate with friends, family, colleagues and companies. In today's world, it is essential that people in your organization are able to use digital, social, and

mobile technology to keep abreast of information that affects your industry, to "listen" to and communicate with customers, and to work with colleagues. The ability to test and to learn how to use new technology sets individuals and organizations above their competition, especially in being able to gather information and communicate quickly, broadly, and effectively.



The second competency: Dynamic Collaboration

Technology provides great opportunity for collaboration, which is why we suggest developing the competency to use technology appropriately and effectively as a building block to collaboration. Technology is not what

collaboration is about, however. In order to create Dynamic Collaboration, an organization must create opportunities for people to discuss what they are working on. Those organizations where workers are able to contribute to projects that they have knowledge and passion for are able to engage their people and to enable them to do their best work for the advancement of the organization.



The outcome: Organizational Agiility

With high levels of capability in the three competencies, your organization is more able to anticipate and make change happen effectively. Communication becomes faster and more inclusive through the use of technology and the collaborative nature of the organization. When the focus is on moving forward and innovating, people understand that when things aren't perfect, we don't abandon the idea, but try something new to get to our end result, with a persistence to create change.

Because these competencies are built upon the first, foundational layer of principles which align the organization, the agility you build is focused. Rather than being so flexible and adaptable that you are caught up in "flavours of the month" type behaviour, the end result that you are striving for and the values that you operate under are always in mind. In this way, the change that you create is sustainable and of high value.



The third competency: Relentless Innovation

We have seen innovations from organizations like Google, Netflix, and AirBnB, and how they have led to success. These organizations take some risks, allow for learning from failure, and above all, continue and push

forward to implement new and different ideas. When we talk about innovation we know that it is important to put systems in place to provide opportunities for idea sharing, to involve diverse people, and to be prepared to fail and move forward with relentless focus.



The Impact of the **High Performing Workplace**

For years, we have been measuring engagement at work and have seen low ratings across the country. In the future of work, we see a critical need for reinvention. Those organizations that make the move Digital natives, who have never

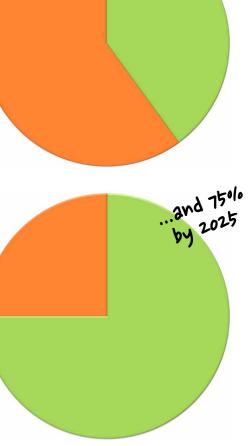
'It's critical that organizations understand what is driving their engagement results and how to connect them to desired outcomes. High engagement levels may be fleeting if trust and agility aren't deeply established, and organizations will not achieve sustained high levels of performance without them." ~Alyssa Burkus

now to reinvent their workplace will become employers of choice for high performers. Talented people who are passionate about what they do will flock to those organizations that provide purpose, trust them to be involved



and empowered. and enable them to make a difference to the organization, their community or the greater world.

Digital natives, who have never known a world without technology at their fingertips, will make up 40% of the workforce by 2020 and 75% by 2025. They expect to be able to access technology, use it to communicate, collaborate and to get work done. These workers have grown up in a world where, through social technology, everyone has a voice and is able to impact others across boundaries. They expect these sorts of opportunities at work, and will be most effective when provided with them.



known 3 world

without technology

at their fingertips,

will make up

40% of the workforce by 2020



Reinventing the workplace goes beyond measures of engagement, happiness or even loyalty at work. It is about achieving real business results and developing the ability within organizations to sustain success over time.

The Impact of the **High Performing** Workplace cont'd

On the other hand, organizations that continue to manage work the way they always have will not be able to attract or retain top talent. Even with the talent they do keep, without the principles and competencies we have outlined, their people will be chained to non-productive work methods and processes. It will become increasingly difficult for these organizations to flourish and grow.

The principles and competencies we have will certainly will help to drive engagement by providing autonomy, purpose and connection for

"These two factors - trust and

agility - are critical to helping

people and organizations

reach their potential and build

sustainable success. Please

don't read this book and put it

on the shelf. Discuss it with

your colleagues. Try some of the

tactics. One person's actions can

~Pam Ross

your employees, with that said we expect a deeper impact than what many consider to be employee engagement.

create strong ripples that build A high a wave of impact on culture. performing You can be the one to start your workplace reinvention!" workplace provides people with the opportunity to do their best work. When you unleash an aligned workforce across levels and departments to collaborate and innovate together, you are able to anticipate



customers' needs and get to market faster than competitors, with new and innovative products or services. You should see growth in sales, new customers, and satisfaction.

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So Now What?

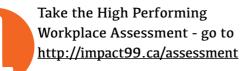
In this book, we have shared 90 unique ideas to get you started on your journey to reinvent your workplace. We hope that as you have read each chapter, you have selected ideas that you think fit your workplace and culture and put them into practice.

One idea, turned into action, can become a springboard for other ideas and practices, sparking greater change. Sharing your story, what you have done, the challenges you faced, how you surpassed them and the impact you had can inspire others to try something new.

If enough of us truly care about our workplaces and about creating positive change, we can develop high performing, innovative, agile organizations. We can provide people with purpose and lasting happiness at work.

Together, we can reinvent work.

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Order a printed copy of this book developed for you to create your roadmap - the Handbook for High Performance Workplace Champions - at: http://impact99.ca/workplacereinvention-handbook/

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with Lee Vincent

"Ross and McLeod have assembled the smart blueprint for the 21st century workforce. Finally, we can sink our teeth into something that's real, and not some fancy schmancy repackaged crap from the past. Workplace reinvention? More like survival!"



~ Jody Thompson

Co-Author of the best-selling book Why Work Sucks and How to Fix It

Ready to reinvent work? This workbook will help you make it happen!

Since 2011, a small group of trailblazers have been bringing workplace champions together in person and virtually to discuss the need for change in the workplace, how to better engage teams and how high performance is achieved.

This handbook is a culmination of thousands of conversation threads that have resulted in a blueprint for workplace reinvention, with real examples of organizations living this transformation and over 90 tactical actions that every workplace champion can choose from to spark meaningful change. Written by business leaders for business leaders, this is the why, how and what you have been waiting for to get to better business results...with a more engaged team.

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