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Purpose

The purpose of this guide is to provide guidance to Seymour Whyte's Managers on working from home arrangements being implemented because of Coronavirus. The intent of this guide is to minimise overall business disruption and provide consistency in our approach to implementing productive and transparent working from home arrangements.

What's unique about working from home due to Coronavirus?

- ❑ Being encouraged or directed to work from home en masse, during a global pandemic, following an already stressful bushfire season is not a normal situation for any business or individual. It is vital that Seymour Whyte focus on both productivity and the welfare of our people during this time – for the benefit of everyone.
- ❑ Keep in mind that people (our Managers included) may be fearful right now, and it's likely we may become more anxious over time. We've only got to look at the mass panic buying tendencies to see just how powerful fear can be. As Managers, we must make every effort to communicate transparently, empathetically and regularly to avoid a similar mindset invading our operations.
- ❑ Managers must always, very clearly, agree your expectations with your people. Thinking about Coronavirus, Managers are encouraged to revisit what's possible from your teams during these trying times. Ask yourself, are current performance objectives and goals still appropriate given the current climate? Be clear on the priorities and make sure you address any issues promptly, so they don't fester in the virtual environment.
- ❑ For the benefit of everyone – Seymour Whyte must remain productive. Our people are worried about a lot right now so expecting your team to remain 100% focused could be a stretch – a dip in productivity is to be expected. Managers can help to mitigate this by making sure that people maintain, as far as reasonably practicable, their routines and usual total working hours to achieve high-value work.
- ❑ Our engagement strategies need to change. A key to helping your people to feel engaged is by ensuring we feel connected to the purpose of our work. This is always important, but even more so during tough times. Managers are encouraged to regularly remind your people of the value and purpose of the work we're doing. Then make sure we're continuing to recognize and praise the efforts of your people.
- ❑ There may be some resistance to this change. Given that these working from home arrangements are being implemented en masse and very quickly, it's possible that people may resist the change to their normal environment, new technologies being implemented and more. Use the resources in this guide to assist in managing this change process.
- ❑ We could be in this for a while. All reports from the government are that self-isolation measures are not a quick-fix to our pandemic crisis. Establishing transparent working from home protocols will help to build trust within your team and promote productivity. Let's start as we mean to go on.

The following appendices are attached which Managers may find useful:

- ✓ Fact sheet: Promote a culture of transparency
- ✓ Fact sheet: Overcoming resistance to change
- ✓ Fact sheet: Create the conditions to build trust
- ✓ Fact sheet: Trust to be trusted

Establishing working from home protocols

Get the administration done now. Managers are encouraged to employ as many of the processes below to maximise productivity and connectedness while teams are working from home.

- All people working from home should have a completed and approved Performance and Development Plan including Performance Objectives prior to commencing their work from home arrangement.
- It's recommended that Managers direct their people to complete the following forms to facilitate the working from home process:
 - SWC-HRP-160.20 Work from Home Checklist – Mandatory
 - SWC-HRP-160.30 Work from Home Guide (COVID-19) – *Mandatory if there are dependent children in the household during the working from home arrangement*
 - SWC-HRP-150.10 Leave Application – If relevant
- Discuss and diarise (Managers will likely have multiple), regular, intentional check-in meetings to be conducted preferably over video conference. Introduce this concept when you are agreeing strategies for one-on-one and team communications with your people. Discuss that the intent of these check-ins is to ensure health, wellbeing and connectedness as a priority as well as being productivity related. Managers are encouraged to schedule these check-ins to be daily or every other day for the duration of the working from home arrangement.
- At an individual level, agree how you will be assessing performance. Revisit Performance Objectives and weekly, monthly, quarterly objectives or responsibilities to determine how performance will be measured in the virtual environment. When will each objective/responsibility need to be discussed – daily/ weekly/ individual/ team check-ins? How will completion of tasks be communicated? How will coaching and development take place in the virtual environment? Do this collectively for any team/ sub-team deliverables.
- Once your team has confirmed it's working from home arrangements, publish a calendar to share with the team to show where and when the team will be available. With the view to maintaining routine and normality, we'd ideally like to try and keep at home working hours aligned to normal workplace working hours wherever possible. Ensure your team calendar is updated as situations evolve.
- Agree and diarise, regular, intentional team (and sub-team as relevant) meetings to be conducted preferably over video conference. Consider if your usual team meeting agenda needs to be updated to improve the virtual meeting experience. Managers are encouraged to dedicate the first part of meetings to asking each participant how they are faring at the time. Consider dedicating a specific portion of the meeting to get discussion about Coronavirus developments out of the way – consider this as “identifying the elephant in the room” and moving onto productive topics with clarity.
- To promote connectedness, get your team to develop team goals. While individuals are working on specific deliverables and checking-in regularly with Managers, what are the goals that will require collaboration or that will promote connectedness amongst the team. Goals may be both productivity/deliverable-focused or could be more social goals. Have these agreed as soon as possible to avoid isolation setting in very early.
- Ask your team if there are any new team norms to be established. Maybe you would like every phone or video conversation to start with, “How are you?”. Maybe you would like to establish a shared expectation of transparency and support to encourage team members to feel comfortable sharing their challenges or concerns promptly. Maybe consider introducing a buddy system to look out for one another.
- Consider agreeing and diarising, regular, intentional, voluntary social interactions for your team. Many successful organisations are promoting virtual group morning teas, lunches or

Friday drinks as a way of encouraging continued social connectedness. Keep in mind that people have different living arrangements and may be more socially isolated because of working from home arrangements and other self-isolation measures as they evolve within our communities.

- In the early days, it's better to be overly connected, to over-communicate, to check-in (for genuine reasons) too much, rather than under-cook the working from home process.

The following appendices are attached which Managers may find useful:

- ✓ One-on-one check-in meeting template
- ✓ Fact sheet: Set the stage for productive cross-unit collaboration
- ✓ Fact sheet: Formulate smart objectives that effectively spur people into action
- ✓ Fact sheet: Foster a sense of accountability

How to give feedback in the virtual environment

Just like in the workplace, we all know that when it comes to giving feedback, email or messaging aren't the best way to communicate. Layer a sense of isolation and a genuinely stressful global pandemic on top of black and white text and we have a recipe for disaster. For instance, 'nice job' can seem cold and sarcastic even when it's meant genuinely. The lack of tone can mean people obsess over punctuation. 'Did they mean to not capitalise? Are they angry? Where are the emojis?'

Managers are encouraged to communicate using video conferencing facilities as much as possible, or on the phone so you can at least communicate with tone and context. This is particularly important when giving feedback – and setting up this method of communication as the norm means that when you need to give people constructive feedback they know it's just part of the usual communication process.

Remember these tips for giving feedback in the virtual environment:

- Face to face is best.
- Timing is key:
 - Don't save up feedback for the weekly check-in – both praise and behaviour change feedback are best given sooner rather than later.
 - We also know there is a lot going on for everyone right now, so make sure you do your regular, "How are you?" check-in first so you can tailor your delivery to the situation.
- If your feedback requires you to put some content into an email:
 - Make the call first and send the email as you talk so you can go through it together.
 - Consider writing the email, then reviewing it or re-writing it and imagine that you have the person in front of you as they receive the feedback.
 - Don't compromise the content by sugar-coating or watering it down but recognise where misunderstandings may arise and write the email with safety in mind.
 - From a legal standpoint, just be mindful that emails are records that may resurface in future.
- Ensure the interaction is two-way.
- Remember: it takes five times as many positive interactions with someone for them to recognise positivity. Don't hold back on genuine praise, help eliminate any negative bias (perceived or genuine).

The following appendices are attached which Managers may find useful:

- ✓ Fact sheet: Making feedback a key performance driver
- ✓ Fact sheet: Foster a sense of accountability

Virtual Meetings

With social distancing and remote working, phone and video calls and meetings will be the new norm. It's easy to take for granted the visual cues of the workplace until you are not physically present. The little smiles and nods we give and receive not only make us feel more connected, they contain valuable information. Managers are encouraged to discuss the below with their teams and keep in mind as virtual meetings take place:

- Can you hear/see me? Encourage people to do a video test before going live. As soon as possible, make sure the system works and get in touch with IT Service Desk to trouble-shoot any issues.
- What's in the background? Piles of dirty laundry or the TV/ radio broadcast in the background easily become distractions for others on the call, impacting on productivity. Encourage people to consider what's in frame or earshot to maximise productive time during meetings.
- Who's at home? Whether in the workplace or at home, people could find themselves having to share their work space with others. Encourage everyone to advise others in the vicinity/ household regarding upcoming video/ conference calls to avoid interruptions and distractions.
- Am I on video? Don't assume that a teleconference will remain as such and be prepared for video calls to come through at any time. Managers are encouraged to use video as their preferred communication medium so make sure that this expectation is clear to your team. Jokes aside, we encourage everyone to wear something appropriate for video meetings, including more business-like attire if the meeting is important.
- Who's on the line? It's likely that some team members may need to be on a teleconference during video meetings, for whatever circumstance. To ensure these people get the opportunity to participate fully, consider getting them to speak first. It can be hard to know when to interject or assert a position when you can't see the rest of the team and it can be easy to forget to involve people who can't be seen.

Inclusion and creating a virtual community

Most of us value quality time with our co-workers, which often includes communication about topics that aren't always work-related. Managers are encouraged to devote a little extra time to communicate casually in between work-related discussions. It can help if Managers open this dialogue by volunteering casual information about themselves in interactions to encourage the employee to follow suit, which helps establish trust. Maybe you disclose the latest project your kids are working on, or the work you've done in the garden/ on the car/ in the house over the weekend? Try not to make all these casual discussions Coronavirus related!

Managers can quickly foster a sense of belonging in the virtual workplace by injecting a sense of office fun into the virtual office. Small things Managers may like to consider might include: online competitions, themed meetings like 'wear your favourite sports gear on Fridays', or regular optional social get togethers for morning tea or lunch.

The following appendices are attached which Managers may find useful:

- ✓ Fact sheet: Cultivate social networks
- ✓ Fact sheet: Energize your team

Mental health and wellbeing considerations

The mental health impacts associated with Coronavirus may be significant. Psychological distress is likely a prominent emotion in workplaces across the world, and it's not something most people are confident addressing. As a Manager, you are encouraged to recognize that there won't just be general disruptions to the way people work, there's market volatility, talk of recession and the impact of Coronavirus on the health of our community. We'll likely experience levels of psychological distress unseen in recent times. And many people don't feel comfortable disclosing their stress or poor mental health to their managers which creates extra challenges for Managers. It is vitally important that Managers check-in regularly with your team to see how they are coping. The ELT will continue to provide regular updates to both Managers and our people.

All Seymour Whyte employees and their immediate family members still have access to our Employee Assistance Program: Acacia Connection.

Phone: 1300 364 273

Live chat via: www.acaciaconnection.com

Text: 0401 33 77 11

Email: info@acaciaconnection.com

Skype: acacia.connection

Book an appointment online at: www.acaciaconnection.com

Check out the online resources available to Seymour Whyte employees at: <http://www.eapcounselling.com.au/employees-login>

Username: SWC and Password: #!SWC2019!#

The following appendices are attached which Managers may find useful:

- ✓ Fact sheet: Cope with stressful situations more effectively
- ✓ Fact sheet: Trust to be trusted
- ✓ Acacia Connection fact sheet: Managing mental health for Managers
- ✓ Acacia Connection fact sheet: Coping with change
- ✓ Acacia Connection fact sheet: Self care

What's acceptable when working from home?

Generally, anything that would normally be acceptable or not acceptable at your usual place of work applies when you are working from home.

Acceptable	Not Acceptable
<input checked="" type="checkbox"/> Briefly running errands	<input checked="" type="checkbox"/> Being unproductive
<input checked="" type="checkbox"/> Taking regular "brain breaks"	<input checked="" type="checkbox"/> Harassment and bullying

Acceptable	Not Acceptable
<input checked="" type="checkbox"/> Negotiating flexibility with your manager <input checked="" type="checkbox"/> Dressing appropriately for the environment <input checked="" type="checkbox"/> Scheduling a few social virtual activities with your colleagues to promote connectedness	<input checked="" type="checkbox"/> Discrimination <input checked="" type="checkbox"/> Sexual harassment <input checked="" type="checkbox"/> Caring for dependent children (<i>under 12yrs</i>) <input checked="" type="checkbox"/> Failure to comply with the Code of Conduct <input checked="" type="checkbox"/> Failure to comply with Company Policies and Procedures <input checked="" type="checkbox"/> Not working your agreed working hours

Tips for working from home

- Managers can encourage your people to work in "sprints". If your people are used to doing an eight or ten-hour day, they may assume that they need to be sitting at their home office workspace between those hours. That is not naturally how our brain works. Our brain works in sprints of about 60 to 90 minutes. Encourage your people to develop a new rhythm where they set themselves a task or goal to achieve in a 60-minute timeframe, shut down all distractions, and reward themselves upon completion.
- One risk of working from home is the blurring of the work/life balance. Often this isn't so much at the beginning or end a day, but at lunchtime. Encourage your people to ensure they take lunch and other breaks, and to switch off at the end of the day in the same manner that they do when they leave their normal place of work. Normally people have the commute to or from work to prepare or decompress from their day, so perhaps they could implement a new ritual instead – a walk or some other form of exercise to transition out of and into home life?

The following appendices are attached which Managers may find useful:

- ✓ Acacia Connection fact sheet: Mindfulness
- ✓ Acacia Connection fact sheet: Work/life balance

Working from home and dependent children

It is highly recommended that you ensure those with dependent children in the home during the working from home arrangement complete the SWC-HRP-160.30 Working From Home Guide (COVID-19) to initiate the working from home process. In most instances, it is not feasible to simultaneously be the primary carer (and home school carer) for children under the age of 12 years and work to your usual capacity during your standard working hours. As a Manager you may need to work with your people to amend working hours and/or responsibilities to maintain productivity.

Transparency is key when establishing effective working from home arrangements. Honest and frank discussions about balancing business and personal needs helps to promote trust in the virtual environment. When considering amendments to working hours and/or responsibilities, consider some of the below in mapping out the best solution for the individual, your team and Seymour Whyte – liaise with HR as required:

- Can the individual share caring arrangements with another person, so they don't have to be primary carer during some, or all, of their usual working hours? Talk to them about what this might look like. For example, can working hours be updated so they can continue their usual total working hours each week? Can they dedicate specific days to work (and get paid) and other days to care (accessing approved leave entitlements during these days)?*
- Ensure you communicate in a manner so people understand the priorities and obtain their commitment to meeting agreed deadlines and work hours. For example, is it feasible for people 'make up work time' in the evening or on weekends? Be open with people about regularly reviewing any updated arrangements.*

- *Communicate, communicate, communicate. For example, it might be reasonable that your people let your team know that they may hear child/ren in the background of a conference call however, if this becomes a regular disruption to otherwise productive team meetings, speak to your team member about further changes to their arrangements.*

What if a member of my team can't work (occasionally and/or regularly) due to needing to care for their child/ren due to Coronavirus?

The Fair Work Ombudsman's current advice is that employees who can't work because they need to care for a child whose school or childcare centre has closed will ordinarily need to use paid leave entitlements to be paid for their absence. There are several scenarios that may apply, and we encourage Managers to consult with HR to ensure appropriate and equitable access to accrued leave entitlements.

Paid carer's leave is available to full-time or part-time employees where the employee needs to look after a family member or a member of their household who requires care or support because of a personal illness or unexpected emergency affecting the member. Whether particular circumstances amount to an employee needing to provide care or support due to an unexpected emergency will depend on the particular facts. A school or childcare centre closing on short notice and for a short period due to concerns about Coronavirus (for example, because someone at the school has tested positive) is an unexpected emergency for this purpose.

Casual employees are entitled to 2 days of unpaid carer's leave per occasion. Full-time and part-time employees are also entitled to take 2 days of unpaid carer's leave per occasion if they have no paid sick or carer's leave left.

You must give your Manager reasonable evidence of the unexpected emergency.

Other arrangements that may be available include:

- *working from home (if this is a practical option as per the above) or other flexible working arrangements;*
- *taking annual leave;*
- *taking any other leave (such as long service leave or any other leave available under an award, enterprise agreement or employment contract); or*
- *taking any other paid or unpaid leave by agreement between the employee and the employer.*

Example: Employee needs to care for an 18-month-old child during childcare centre closure

Alastor has just received an email from his daughter's childcare centre letting him know that the centre will be closed from tomorrow for 48 hours because a child at the centre has tested positive to coronavirus. Alastor immediately contacts his employer to let them know he'll need to stay at home during the closure to care for his daughter.

They discuss whether working from home is an option but decide that given Alastor needs to actively care for his daughter he is unable to work at his normal capacity.

Alastor's employer lets him know that he can take paid carer's leave because the closure of the childcare centre on short notice is an unexpected emergency. Alastor forwards the email from the child care centre to his employer as evidence.

Example: Employee needs to care for a child during school closure

Winona's children attend primary school. On Sunday she received an email from the school informing her that school holidays will be brought forward to Tuesday rather than starting holidays the Monday after. This means Winona needs to organise care for her children earlier than planned.

Usually, when Winona needs care for her children at short notice her parents help her out. However, given the Government's social distancing requirements, she's unable to ask her parents to look after her children as they are in their 70s.

Winona is currently working from home after her office closed down, but she lets her employer know she won't be able to work at all now while she cares for her children. They discuss her leave options. As this situation is an unexpected emergency, Winona goes on paid carer's leave until when the school holidays were expected to start. She already had annual leave booked to cover the school holidays.

Example: Schools remain open

Dan and Amy send their 3 children to a primary school that is remaining open. Dan and Amy decide to keep their children at home.

Dan and Amy both work full-time. Dan is a registered nurse and is not taking time off work. Amy works in the finance industry and contacts her employer to discuss her situation and leave options. Her employer advises her that because the school is still open and there is no enforceable government direction to keep children at home, this situation isn't an unexpected emergency. This means Amy isn't able to access paid carer's leave.

Amy and her employer agree that Amy can change her contact hours and still be available 20 hours per week. With the reduction in her available time, her deliverables are reviewed, and Amy reduces to 50% hours and pay. Amy and her employer agree that Amy will use her paid annual leave and then go on leave without pay.

What about new starters

Before they start and early days

If you're making an investment in a new hire during these uncertain times, it's more important than ever that you get onboarding right. You want to ensure they feel secure in their new role by counteracting the negativity that's swirling around them as much as possible, and maximise the 'employee honeymoon' and minimise the 'hangover'

Firstly, it's important to adjust your own expectations. It's going to take this new starter longer to add value to your team as they're missing out on face-to-face, on-the-job learning and the social nuances of your workplace. But there's opportunity in this - the new starter can fully immerse themselves in learning and reading all the materials. They can *really* focus on the induction and take the time to learn about Seymour Whyte rather than having to jump in and start the job right away as is often the case. We want to have a focus on productivity, but from a practical perspective what's it going to take to get there?

Consider the 'give a little, get a little' mentality. Allowing new starters more time to get up to speed in the virtual environment can lead to loyal, engaged, long-term employees down the line. Also, if they've had a good onboarding experience, they're more likely to work harder for you when times are tough. We all need to have credits in the bank and people remember how you made them feel. If they feel welcomed and looked after in those first weeks, despite having very little contact, they'll remember that reasonableness. In contrast, if they feel disconnected or hard done by, they will be less engaged which may lead to them looking for another role with another company, ideally we need to minimize turnover whenever possible.

Don't forget to get the basics right: make sure that videoconferencing technology is installed on new starter devices and they have access to all the IT hardware, software and support they may require. And ensure they've completed all the required working from home administration and that you've reiterated their core work hours and followed the recommendations in this guide to maximise the working from home experience.

It's also important to acknowledge that it's likely to be significantly more effort to onboard someone virtually than in the workplace. Managers are encouraged to go overboard as opposed to underboard. Maybe the new starter joins extra team meetings to get a greater sense of the wider team/ context?

Onboarding principles and the first weeks

Managers are encouraged to think about the fundamentals of why we have onboarding processes in the first place. Generally, there are three main reasons:

1. To give the new starter the information they need;
2. To help the new starter feel a sense of belonging; and
3. To help the new starter build relationships with colleagues and key stakeholders.

As a Manager, think about how to deliver some, if not all, of that experience in the virtual environment. For example, one-on-one or team meetings can continue by via video conferencing and a proactive buddy system can work well in the virtual world. It's important that you continue to demonstrate your commitment to the new starter and express empathy for how disconnected they might be feeling.

If possible, provide new starters with relevant information before you schedule calls or meetings with them during the early days. This ensures a more high-value conversation, focused on the new starters questions. Managers are encouraged to remember that it can be difficult to process information over the phone so when it comes to those educational aspects of onboarding, mix it up a little so the new starter remains engaged.

Getting to know them

When someone new joins your physical office, it becomes apparent quickly what kind of person they are. In the online world, it's much harder to get a read on people. Managers are encouraged to invest time upfront in learning about the personality traits of your new starters. As a Manager, if you understand the people within our workforce you're better at being flexible and supporting each member of your team.

Onboarding risks

If the dramatic impacts of Coronavirus continue for months, getting that sense of connection between a new hire and the business wrong in the early days could be damaging when people return to the workplace. We don't want these new starters to finally arrive at the workplace and feel like they don't really know who their colleagues are or that they only occasionally heard from their manager.

It's also easy to get swept up in trying to make a new hire feel comfortable and part of the wider team and forget about adequate training. New starters may not have the typical face-to-face 'on the job' training when working remotely, so Managers need to make sure they are appropriately supported and supervised when taking on something complex.

It's crucial that all stakeholders, including the new starter, Leadership and the new starter's colleagues, know that onboarding in the virtual environment is likely to be more effort – but it's worth it. When Coronavirus passes, and unfortunately none of us know when that's going to be, we want your new hire to feel as much part of the team and as productive in their role as if they'd started in person.



Promote a culture of transparency

The challenge

Inviting employees to show more transparency may easily be greeted with skepticism or even cynicism. Isn't this attitude simply intended to convey a more politically correct image? In fact, transparency poses some real challenges. How do you reconcile transparency with the need for confidentiality? Is telling off an employee who has just lost an important sale the best way to help him or her progress? Hence, to encourage people to be more transparent, companies must also promote the behaviors required to manage this transparency without being naïve.

Four key behaviors to ensure successful transparency

1

Learn to welcome contradiction and bad news

Expressing yourself openly in the face of authority is not easy, especially when you disagree or bear bad news. To encourage this form of transparency, managers must make it easier for their employees to express themselves.

- **Be attentive to your non-verbal language** to identify what could shut dialogue down.
E.g.: Avoid expressions of surprise or incredulity, which could cause the other person to clam up.
- **Show you are listening actively**, while taking care not to rush the other person.
E.g.: Asking open questions to understand the other person's viewpoint fully, as well as inviting him or her to cite examples or be more specific, will help him or her express sensitive messages.

2

Ensure your credibility, particularly by your little day-to-day behaviors

There is no point in being transparent if you are not considered credible! We are tempted every day to dodge sensitive discussions by omitting information or telling white lies. If this is done repeatedly, however, it undermines our credibility and ruins the virtues of transparency.

- **Make promises sparingly**, including in your everyday conversations.
E.g.: A manager who constantly breaks promises to "call without fail" gradually loses his credibility. So, when he practices transparency, his word is called into question.
- **Resist the temptation to tell white lies.**
E.g.: It may be tempting to use a full agenda as an excuse to defer a meeting for which you need more time to prepare. If this is discovered, however, trust will be shaken quite needlessly.

3

Recognize discretion and confidentiality obligations

All information cannot be shared at the same time with every stakeholder. This restriction on transparency is worth clarifying. Otherwise, commitments to transparency may well be perceived as insincere.

- **Assume responsibility for not being able to share everything** and state this clearly.
E.g.: After every meeting, a management committee decides what will be communicated and what must remain confidential, and each leader assumes responsibility for this with his or her teams.
- **Clarify what falls within the scope of confidentiality.**
E.g.: Some strategic data may need to be restricted.

4

Use the tact required to convey sensitive messages

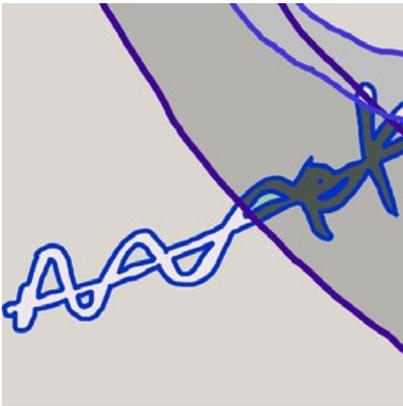
Topics such as criticism of an employee, exploratory thinking on potential team reorganization, etc., cannot be communicated without precaution. Transparency does not preclude being attentive to the potential repercussions of communicated messages!

- **Don't confuse transparency and spontaneity.** Transparency does not involve saying everything, but giving stakeholders access to information which will support mutually-beneficial collaboration and reinforce trust.
- **Carefully manage the quality of your communication.**
E.g.: State criticism in terms acceptable to the receiver, in order to help him or her; define how and to whom to raise the idea of organizational change, in order to move thinking forward and prepare people's minds rather than generate needless worry.



Overcoming **resistance** to change

Understand the psychological barriers to change to manage it more effectively



Didier Avril, série Storytelling

Our sources

This synopsis is based on the publications presented below and on the back page.

It Starts with One
J. Stewart Black, Hal B. Gregersen,
Wharton School Publishing, 2008.

Leading Change: Why transformation efforts fail
Harvard Business Review, January 2007.

Change initiatives that can be qualified as real successes are rare. All leaders know that it takes a lot of energy to transform an organization. While modifying the organizational structure and processes is relatively easy, people tend to dig in their heels where human behavior is concerned. Do they resist change out of bad will? Or are they simply unable to change? Faced with human inertia, even leaders who clearly see that the organization must change for its own good often lose hope and give up!

On an individual level, the problem appears to be almost identical. A person may be aware that he or she should change – show more initiative, collaborate more closely with colleagues, get better organized, listen more to people, etc. – but still continue to do things the same old way year in, year out.

As the authors of the analyzed publications observe, many psychological barriers must be overcome before people can successfully modify their behavior. To facilitate this process, leaders must:

- **Foster awareness to help people truly feel the need to change.**
- **Encourage people to dare to adopt new behaviors.**
- **Provide ongoing support to prevent backsliding.**

In this synopsis...

- 1 Natural **resistance**
- 2 Convince people of the **need to change**
- 3 Incite people to **dare to change**
- 4 Support **efforts over time**

1 Natural resistance

Most strategic initiatives fail. According to consulting firms and research institutes that have analyzed this phenomenon, the rate of failure ranges between 50 and 80 percent. The precise figure is unimportant. The fact is that colossal efforts turn to dust every year.

So what's the reason? Strategic initiatives require change, and much of the time, behavioral change. And therein lies the challenge! Change is tough. Just look at the failure of Western automakers to reproduce the systems successfully established in Japan – lean production, total quality, gembu kaizen, etc. Production processes were effectively modified, but operators continued to demonstrate reflexes inherited

from productivity-oriented thinking. For example, they did not call out defective parts for fear of slowing the pace of production, although the new system was based on solving problems in real time. Or they accelerated production whenever they could, without realizing

People are not wired for change!

that these changes of pace disrupted the smooth organization required for continuous flow management. And so on. The cultural change that needed to go with the new processes did not happen. As the Chairman of Toyota remarked when visiting the U.S., “Detroit simply doesn't get it. They think the answer is in marketing and design and technique

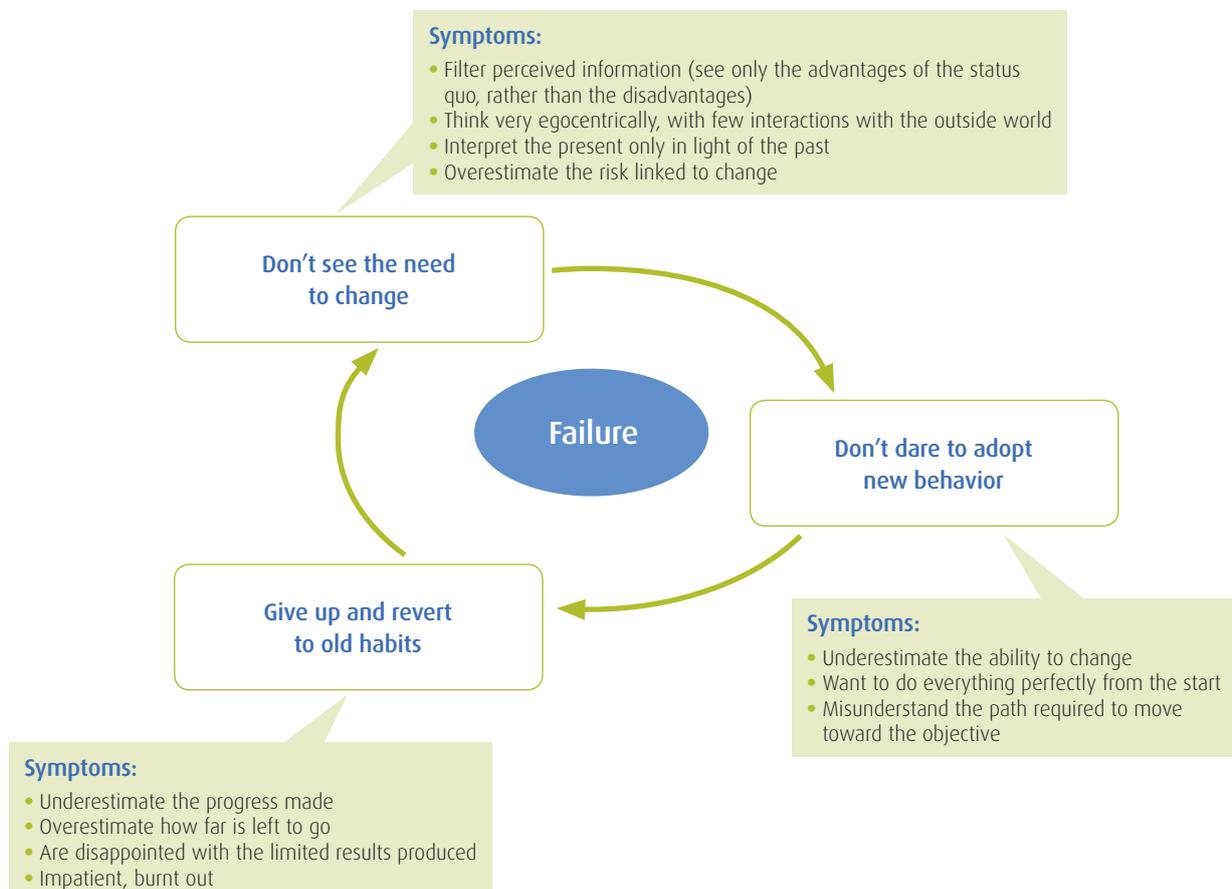
and technology. They don't understand that the answer lies in the hearts and minds of each individual worker!”

Now, people find it extremely difficult to make deep and lasting behavioral changes. Indeed, what could be more natural than to rely upon reflexes gained through experience? Although people are generally willing to admit – rationally – that a new context requires them to do things differently, actually changing is painful. And as soon as pressure mounts, the best resolutions in the world go out the window as they revert to their old, more deeply ingrained habits.

The main barrier to change is thus linked to the ability to modify behavior within the organization. This requires overcoming three types of psychological resistance (Figure A):

FIGURE A Three psychological barriers to overcome

Most change attempts fail. Why? One reason is the difficulty of changing behavior on a lasting basis. Three barriers in particular must be overcome:



Based on *It Starts with One*, J. Stewart Black et Hal B. Gregersen, Wharton School Publishing, 2008.

Acknowledge the need to change

Changing is demanding and involves taking risks. People therefore naturally tend to close their eyes to the fact that change is necessary, or at the very least, urgent. They consequently often filter information subconsciously to make the status quo appear to be the best solution.

Motorola suffered from this bias in the nineties. Analog telephony market leader at the time, the handset manufacturer underestimated the threat posed by the emergence of digital technology. Launching into this new technology required colossal investments that Motorola hesitated to make, arguing that the superiority of digital had yet to be proven. Nokia had decided to make the leap, but did not seem to be much of a threat, given that its CEO was a former banker and not a technology expert, and that telecommunications represented only 2 percent of company revenues. Its blindness to

this threat ended up costing Motorola half of its market share in just six years! Paradoxically, the same scenario repeated itself a few years later, when Samsung put cameras into its phones. Both Nokia and Motorola ignored the need to move to multimedia telephony. These two market leaders saw only the reasons not to take heed of the threat – poor photo quality, the low penetration of Samsung, known only on the Korean market, etc. All the signals pointing to a market revolution were perceived as negligible.

Similarly, an employee asked to cooperate more fully with other teams, for example, does not necessarily understand what is wrong with the status quo. After all, things aren't much worse than yesterday, and not much different from what everyone else around him or her seems to be doing. Understandably, he or she wonders whether doing things differently would really make things better.

So long as people do not perceive a compelling need to change, they are

unlikely to make the required effort. The first psychological barrier to overcome is thus the perception bias, which causes people to underestimate the real threat.

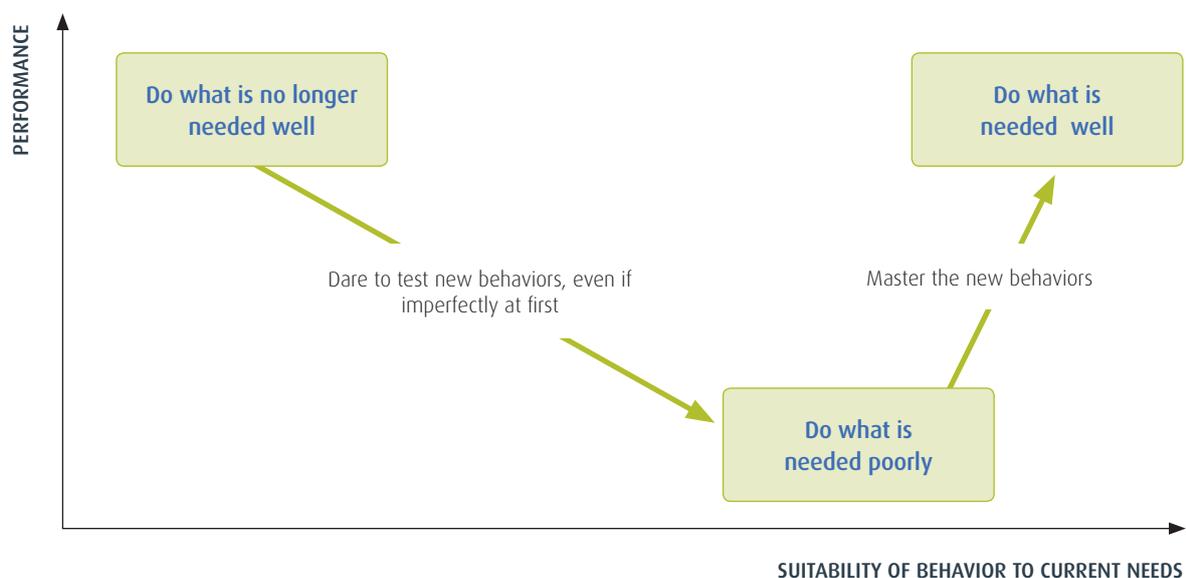
Dare to change

Changing is difficult and frustrating! When adopting new behaviors, people are generally less efficient in the short term, during the time it takes to acquire new habits and learn from mistakes (Figure B). Now, no one enjoys being less efficient. People may thus feel the need to change, but don't follow through because they don't know where to start or are not sure to succeed.

This is what happened at Xerox in the late nineties when the company tried to respond to the arrival of personal copiers sold by Canon at one-tenth of the price of its office machines. Rick Thomas, one of the architects of the IBM transformation, joined Xerox to transform the company around a vision

FIGURE B An inevitable learning curve

Changing behavior means accepting to perform less well initially and to make mistakes, while progressing along the learning curve. This is the price that must be paid to move in a new direction.



Based on *It Starts with One*, J. Stewart Black et Hal B. Gregersen, Wharton School Publishing, 2008.

of offering not just photocopiers to customers, but complete document management solutions. The need to change was clear. The vision was convincing, similar to the one that turned IBM around, and driven by a credible leader. Yet, people didn't follow. Analysis showed that the sales force, particularly competent in selling photocopiers, was upset by the idea of failing at selling solutions. The individuals concerned realized their ignorance in this domain and saw a gap that seemed so insurmountable that they didn't want to risk it. As a result, the transformation project could not get off the ground for many long months.

The same phenomenon also stops employees from taking more initiative when they are asked to do so. The advantages of a more proactive attitude are easy to demonstrate and people often feel the need to change. But they wonder where to start, and how much autonomy they really have. Should they ask for some kind of approval anyway? How often and what should they report to their superior? What will happen if they make mistakes?

So long as people do not perceive that change is possible and that they

can succeed, they hesitate to move. This is the second psychological barrier to overcome.

Persevere despite setbacks

Finally, change is a long process. People must first recognize the limitations of their reflexes and be willing to try new behaviors, then practice them until they become ingrained (Figure C). A long effort is required, often over a period of years, to make lasting changes. During this period, people are sorely tempted to take the easy way out and fall back into their old ways. Moreover, changing behavior does not always produce the anticipated results. The greater the effort expended, the greater the disappointment when no progress appears to be made. Take the example of an airline employee who tried very hard to act in accordance with his company's "Customer First" vision. One day, a particularly difficult customer made a scene at a time when this employee was particularly tired. Instead of listening and trying to solve the problem, the employee snapped at the customer and told him off. At this, the customer stopped whining and

bothering the employee, who noted that the old way seem to work better, at least in the short term. Very rapidly, he fell back into his old habits.

The author of *Leading change: why transformation efforts fail* recounts that out of twelve reengineering projects that he closely tracked, ten declared victory much too soon. After two or three years, the company stopped managing the change as a project, considering that the battle had been won. However, in the ensuing years, the organization gradually reverted to its old ways of doing things!

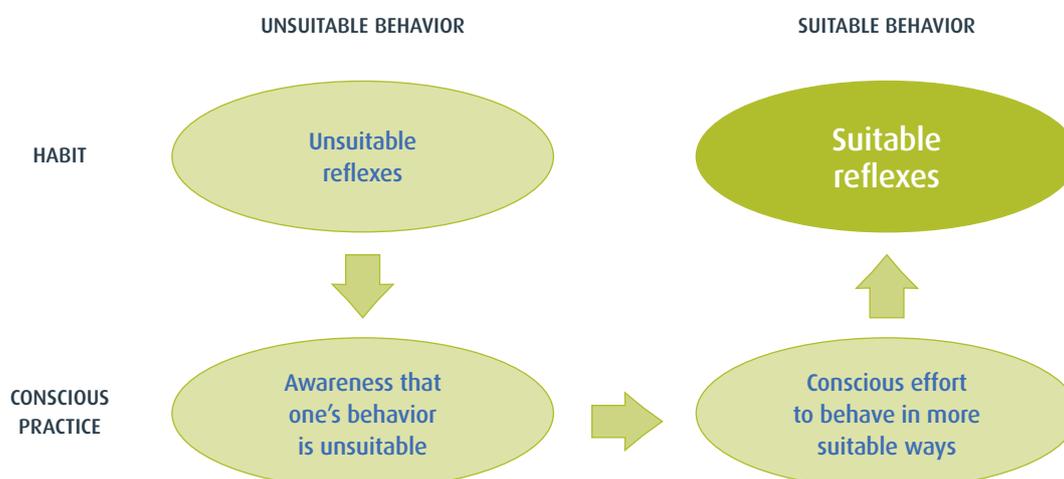
So long as new behaviors have not become ingrained on the individual level – and on a larger scale, so long as they are not embedded into the corporate culture – the risk of backsliding is omnipresent.

Overcoming these natural obstacles to change consequently requires three types of action:

- Convince people of the need to change;
- Help individuals dare to change;
- Support efforts over time.

FIGURE C The process of learning of new behaviors

Change is accomplished only when new behavior becomes embedded and habitual. Before that, a conscious effort is needed to display new behaviors.



2 Convince people of the need to change

The first step in convincing people to change involves persuading them that change is absolutely necessary. Now, this often requires a lot more effort than one might initially think. Indeed, those initiating change have taken the time to think about the subject, note that a problem exists, analyze the various options, weigh the pros and cons, select a solution, etc. Once they are convinced

The status quo must be experienced as more worrisome than change.

that change is imperative, they forget how long it took them to get to that point, and expect a well-constructed argument to make the same conclusion obvious to everyone else.

In practice, however, a mere argumentation is not sufficient, no matter how logical. So long as people do not feel the need to change, they will easily find arguments that justify doing nothing! A real awareness of the need for change must therefore be created:

Convey a simple message

It is tempting to be exhaustive when trying to initiate change. Reality is always complex, and the list of things to change is generally long. However, giving too many details incites people to use their natural filter and retain only what makes them most comfortable. A better idea is to convey one simple message and repeat it over and over. Even if this approach may seem simplistic or somewhat exaggerated, it is the only way to ensure that the message will be truly understood and embraced. The boss of an employee doing a poor job should not enumerate an exhaustive list of everything that the person needs to change, for instance, but rather select one or two dimensions on which the

person should focus initially. Likewise, when Fedex wanted to change its call center organization, the message “One call, One rep” was the sole watchword. While there were many problems, focusing on the fact that customers were shunted from one representative to another, and that their calls were sometimes even dropped along the way, convinced everyone that a change had to be made.

Appeal to emotions

Explaining the need to change is not enough; people must “feel” it. In one of the examples cited in *Leading change: why transformation efforts fail*, the CEO went so far as to deliberately organize the biggest accounting loss that his company had ever known to jolt the organization out of its inertia. The manager responsible for Fedex’s change project showed a video retracing the struggle of a customer trying to get help from the call center, then a second film demonstrating how the same interaction would have taken place in the “One call, One rep” organization. The contrast was so striking that everyone got immediately on board. The CEO of Samsung went even further. He sent his 50 top executives to the U.S. to visit mobile phone distribution channels. To their great surprise, they discovered that their phones were often relegated to the discount bins and never displayed as prominently as the products of their competitors – a far cry from what they were used to in Korea! Nobody again challenged the need to revise the strategy.

Enlist support from outside the company

The greater the number of people stating their conviction that change is needed, the more the conviction of each individual will be reinforced. In this regard, the influence of people outside the organization – reputed to

be more objective – is a driver that must not be neglected. Financial analysts or the press, for example, are often used by executives who want to initiate large-scale change. Indeed, when headlines are saying that a company is going down the tubes, employees are more willing to accept the need to change. At team level, the help of a coach or expert is often very effective in this respect.

3 Incite people to dare to change

Even when people feel the need to change, actually making the leap is never easy.

This difficulty in taking action is not necessarily the sign of lack of willingness. More often, it is a sign that those concerned realize the scale of the changes to be made, and they are not sure of succeeding. In this case, they must be helped to take the first steps:

Constantly recall the vision

Clearly stating the expected result – and repeating over and over that this requires everyone to contribute – is essential to achieve change. Knowing where the organization is heading and feeling like a stakeholder in a collective effort can give people the energy

People are willing to try to change only if they feel they have a chance of succeeding.

they need to take the first steps. This is even more effective if the project is presented in a way that speaks to each individual (Figure D). If the desired result is sufficiently attractive, merely hearing a reminder at the right time can be sufficient to trigger desired behavior. For example, the airline that launched the “Customer First” campaign used this slogan in every communication. Reference was made to it in every

speech, every internal memo, and every press release. Department heads were encouraged to talk about it at team meetings and mention it explicitly when they gave employee feedback. Posters were displayed on every wall, as a helpful reminder of the right behavioral choice for representatives in difficult situations.

Rely on champions

People often learn to behave in new ways by emulation. Knowing that others have tried and succeeded is the ultimate proof that change is possible. Getting first movers to convince others is therefore a very good idea. For example, to transform the corporate culture, leaders should be the first to change their behavior. Identifying the most

willing employees in a team and relying on them to help the rest of the group to change is also very effective.

Facilitate action

When employees hesitate to modify their behavior despite their realization that change is needed, this process must be facilitated. When Fedex wanted to make its account managers more versatile, the latter were initially very reticent. They were used to working in specific domains of expertise in which they were highly competent. Responding directly to any customer request meant that they needed training in every possible subject matter. This seemed impossible, because they imagined that they had to become experts on everything. However, the

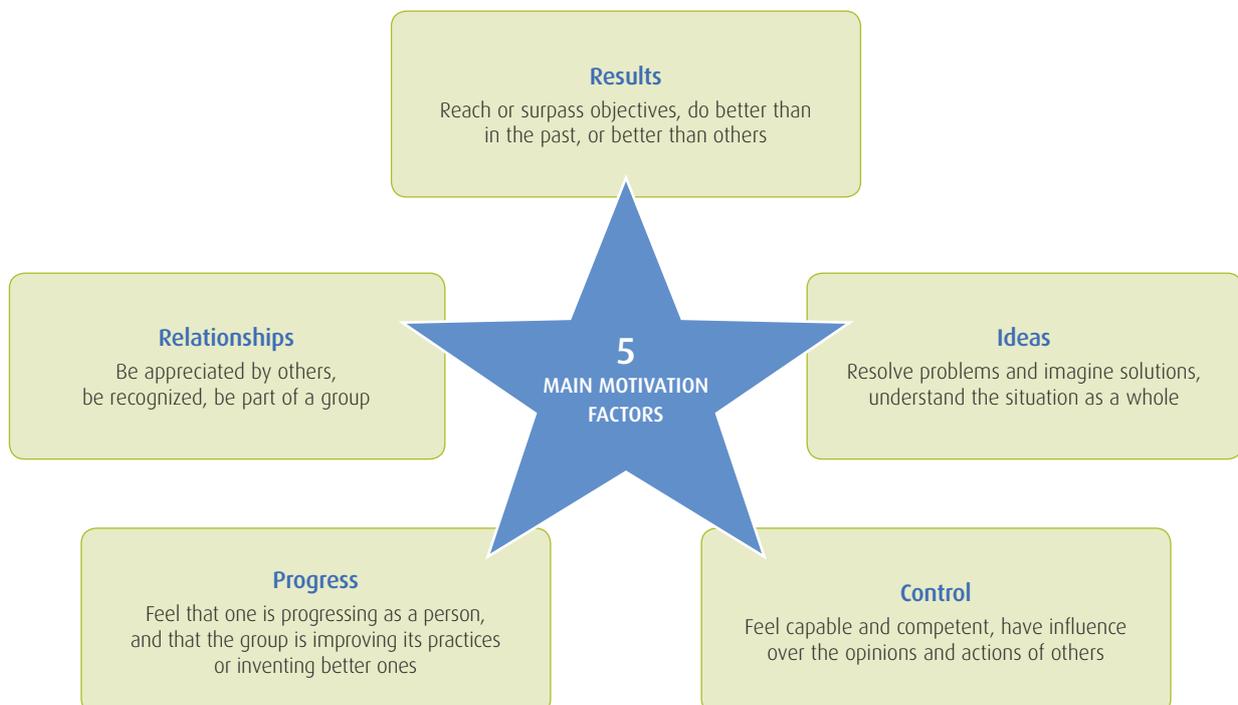
team in charge of leading change noted that 80 percent of calls concerned only about twenty questions. Account managers were thus trained on these questions, and given succinct outlines to help them remember what they needed to know. As a result, they rapidly felt more comfortable about answering questions without transferring the call and gradually “filled in the holes” on other topics. In a similar manner, the airline that launched its “Customer First” program prepared a list of typical scenarios, describing what to do in each situation to put the customer first.

In large-scale projects, starting out with “pilot tests” – entrusted to the most enthusiastic members of the team – subsequently makes it easier for the rest of the organization to follow. The successes and solutions developed by

FIGURE D Present change objectives in a way that speaks to individuals

Different people have very different motivations. This fact must be taken into account when presenting change objectives, and when choosing the right words to assess progress and to encourage people to persevere.

There are five main motivation factors, each of which plays a more or less important role depending on the person:



Based on *It Starts with One*, J. Stewart Black et Hal B. Gregersen, Wharton School Publishing, 2008.

the pioneers in response to problems they encountered can then be used as examples. For a team, this might involve temporarily obtaining supportive resources or local coaching.

4 Support efforts over time

Changing successfully means that new behaviors must be integrated to the point where they become habitual on an individual level, and are an integral part of the company culture for transformations on a larger scale. However, this requires huge efforts which do not necessarily produce immediate results. The temptation to revert to old habits must therefore be continuously combated.

Put “champions” on site

The difficulty of changing is often very clear on the ground, while the expected benefits are often very far in the future! Support must therefore be provided very locally and on a daily basis. Local management consequently plays a key role. This requires that line managers agree to the change and have succeeded in adopting the desired behavior themselves. Alternatively, change champions can also be designated outside the normal hierarchical structure to support their peers in times of doubt.

Celebrate efforts, not just success!

When people first start to change, their results will probably be below expectations, because they are likely to make mistakes when adopting unfamiliar behavior for the first time. Moreover, the impact of change is often not immediately apparent. It is therefore important to acknowledge not only results, but also the effort expended. For instance, a sales force

that moves from a product-oriented organization to a customer-oriented organization might perform less well initially. Sales reps are less competent on the entire range than on the one particular product they used to sell, and aren't yet sufficiently familiar with customers to identify opportunities to sell more complete solutions. As a result, sales volumes will probably drop

Change must be continuously supported.

at first. If the efforts of sales reps are not recognized, they may very well begin to resist and become discouraged. Judging them on their results alone is the surest way to get them to revert to the behavior that made them successful in the past, e.g. pushing their pet product with their more limited circle of customers.

Measure how far people have come and how far they still have to go

For people to stay motivated over time, they must realize that their efforts are helping. Establishing a dashboard with a few significant indicators is very useful for this. It is essential to keep a “snapshot” of the original situation to show people when they start to become discouraged. Fedex, for instance, used the video used to launch the change to remind people how far they had come, even if they still had some distance to go. In retrospect, people were shocked by the image of the customer shunted from rep to rep, although this hadn't seemed so odd at the time. Statistics on the rate of calls processed without being transferred and on customer satisfaction reinforced the perception that real progress had been made.

Don't declare victory too soon

Finally, all the experts warn of the tendency to conclude too soon that

change is over. They emphasize the importance of supporting efforts over a long period and lifting pressure very gradually, and only once the new behaviors have become embedded. Even when the change is reputed to be firmly integrated, regular updates are needed – once or twice a year – to identify potential backsliding and the need for “booster shots.”



Change is not natural, because people must take risks and make efforts that they would normally prefer to avoid. Those initiating change must be aware of this fact and do what it takes to overcome this inertia, i.e. make people aware of the need to change, help them move out of their comfort zone, and support change efforts over time.

Our selection

To find the best ideas on this subject, we recommend the following publications:

It Starts with One

J. Stewart Black et Hal B. Gregersen, Wharton School Publishing, 2008.



This very simple and pleasant book provides a common-sense explanation as to why so many change initiatives fail. Although the arguments proposed by the authors are nothing revolutionary, they are presented very convincingly, and supported by some very striking examples. It must be admitted that although most of these ideas seem like common sense, they are rarely applied!

The merit of this book lies above all in the simple and memorable way it structures the ideas in order to facilitate their implementation. Three sections of two chapters each are dedicated to the two principle barriers to change, i.e. "failure to see" (chapters 2 and 3), "failure to move" (chapters 4 and 5), and "failure to finish" (chapters 6 and 7). Each of these chapters analyzes the psychological mechanisms that push people into these traps, and offer advice and tools to avoid them. Among the many examples cited, some in great detail, we particularly recommend the story of the transformation of the Fedex call center, as well as the changes that Dell initiated in customer behavior, described in chapter 8.

A book recommended to all those who must manage change, or who say they want to change themselves.

Leading Change : Why transformation efforts fail

John P. Kotter, Harvard Business Review, January 2007.

This article summarizes the main conclusions drawn by John Kotter from many years of facilitating large-scale change in global organizations. He describes eight classic errors that explain the high proportion of failed change projects, i.e. the lack of a sense of urgency, the lack of a strong coalition driving change, the lack of a vision, the lack of communication, the lack of attention to obstacles, an excessively long-term perspective, the tendency to declare victory too soon, and the underestimation of the impact of the company culture. Just what managers in charge of leading change need to create an effective roadmap.

And also...

We also relied on the following publications:

- **Leading Change**, John P. Kotter, Harvard Business School Press, 1996. (Book)
The eight steps of a successful change project.
- **The Challenge of Organizational Change**, Rosabeth Moss Kanter, Barry A. Stein and Todd D. Jick, The Free Press, 1992. (Book)
Obtain a better understanding of organizational change.
- **Mobilizing the Organization**, George H. Litwin, John Bray and Kathleen Lusk Brooke, Prentice Hall, 1994. (Book)
The characteristics of successful approaches to change, based on an analysis of several European companies' change experiences.
- **Charging Back Up the Hill**, Mitchell Lee Marks, Jossey-Bass, 2003. (Book)
Help people get past the mourning stage and face the future in times of change.

Further readings

To explore this topic further:

- **Make the organization change-ready** (Manageris synopsis 137a)
Rely on a network of "change champions" to make the organization more responsive.
- **Get people engaged around the vision** (Manageris synopsis 123a)
How to define and communicate a compelling vision.
- **Conversation, an essential leadership tool** (Manageris synopsis 129a)
Develop the ability to help others progress through well-conducted conversations.

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Create the conditions to build trust

We all want to inspire trust, and nothing is more frustrating than having someone refuse to trust you, especially since trust is an essential performance factor. Nicolas, a division manager, discusses this with his coach: *“It’s exasperating. With Astrid, it’s just not working. I do everything I can to help her take initiative. I have proven it time and time again by giving her the resources she requested. I’ve adapted her objectives to reassure her. But she has some gnawing idea that I’m*

The decision to trust others is always difficult.

trying to trip her up somehow. It’s just unbelievable! If I had wanted to get rid of her, I could have done it when we restructured. So why is she so suspicious of me?”

The experts point out that this imbalance is not unusual. Indeed, *The Decision to Trust* underlines the fact that trust is not the natural consequence of a situation, but a decision made by each individual based on their personal frame of reference.

A serious decision

Trust **cannot be granted lightly**. Trusting another person means taking the risk of accepting some degree of uncertainty by agreeing not to explain every little thing and not to control every term of the interaction. If all goes well, there are many advantages, because interactions take place more easily and the trusted person feels freer to take initiative and can seize opportunities as they arise. However, if the situation turns out badly, the person who granted his or her trust is the one who often suffers most. Hence, there is a strong temptation to keep some means of control.

A decision involving multiple factors

The decision to trust another person **is not rationally based**. Admittedly, it is easier to trust someone who has proven trustworthy in the past. But a lot of other factors enter into play. Psychologists have observed, for example, that people who have been victims of attack have lasting difficulty trusting anyone. Similarly, an executive in the hot seat will have more difficulty trusting anyone, even on topics that have

nothing to do with his current problems. It is thus impossible to control all the drivers that determine whether or not a given individual grants his or her trust.

A fragile decision

Lastly, trust **must never be taken for granted**. If the context changes, even longstanding trust may be called into question. Even well-established teams have noted, for instance, that simply adding or removing a member may shift the balance and require relationships to be redefined. Worse, the least breach of trust — failure to keep a promise, an instance of bad behavior — can have lasting effects, regardless of the quality of the trust that existed before the incident occurred.

Although the trust accorded by others is a decision we cannot control, we can still work to create the conditions that foster its emergence.

Five conditions are critical to the emergence of trust.

- 1 Create a **reassuring** environment
- 2 Establish **close links** with the other person
- 3 Demonstrate your **performance**
- 4 Be **predictable**
- 5 Communicate **proactively**

1st condition of trust

Create a **reassuring** environment

Checklist

Have you created the **REASSURING** environment required for trust?

- Is the level of **risk** acceptable? *Have you explored the risk the other person is taking by trusting you? Is there a way to minimize this risk? Are the other person's expectations realistic or should they be adjusted?*
- What **guarantees** can you give? *What factors will drive you to keep your promises? If you fail to live up to the trust placed in you, how can you minimize the resulting damage?*
- How will you take account of the **objectives and concerns** of the other person? *Have you understood and reformulated the other person's objectives? Has he or she validated your understanding?*

When we trust someone, we take the risk that the person in question may not act as we had hoped. We thus expose ourselves to a higher degree of uncertainty than if we had the means to control the situation ourselves. We can accept this uncertainty more easily when we perceive the consequences of a potential failure to be tolerable. For example, IBM based its business success for years on the need for security of the IT managers in charge of choosing equipment. In addition to intrinsic product performance features, the argument, “*no one has ever been fired for choosing IBM*” often swayed the decision to trust IBM.

People trust one another more easily when the corresponding risk is under control.

Creating a solid foundation for trust means carefully cultivating this perception of security. This often initially requires showing that you **understand the things at stake for the other person** and care about them, even if they are not precisely the same as yours. Jacques, a plant manager, discovered this when attempting to gain the trust of his regional director, who had an annoying tendency to “micro-manage” him. After speaking

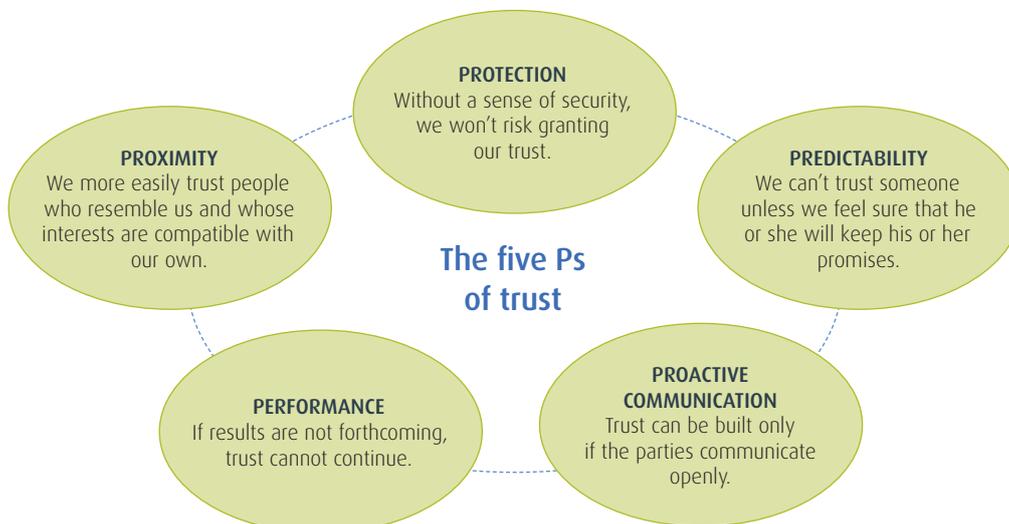
with this director, Jacques finally understood that what he perceived as mistrust was primarily due to the director's need to report to headquarters on the activities of his teams. Management committee meetings were tense, and the regional director had to face what resembled a veritable inquisition. Understanding this issue led Jacques to submit much more detailed reports and to suggest a preparatory meeting before management committee meetings to discuss the findings in detail. In a matter of months, he had won the full confidence of the regional director.

Another way to provide reassurance is **to anticipate potential disappointments and establish ways to mitigate the consequences**. This is the principle behind contracts, which promote trust within a framework that anticipates potential sources of conflict and establishes penalties for the failure to meet obligations. Retailers that offer to take purchased products back unconditionally protect customers from the consequences of their mistakes and thus promote trust — and the decision to buy.

“Experience proves that the man who trusts no one is never disappointed.”

Leonardo da Vinci

Five prerequisites for trust



2nd condition of trust

Establish **close** links

To trust another person, we must be able to predict how that person will act and what he or she is likely to do. So every factor that contributes to reducing this uncertainty tends to reinforce trust.

However, the more we resemble someone, the more we feel — rightly or wrongly — that we can anticipate that person's reactions, because we sense that they must be similar to our own. A good way to foster trust is therefore to **underline similarities, rather than differences**. That is why it is so important for teams or companies to clarify

We more easily trust people who resemble us.

shared values, common objectives and expected behavioral standards. This closeness can also concern more personal factors. Company social events, off-sites or seminars play an important role in this regard. Not only do they represent opportunities for people to meet and share ideas, but are also a chance for them to get better acquainted on a

personal level. They may discover, for instance, that they share the same hobby, had the same major in college, have travelled to the same countries or have children of the same age, etc. Far from being anecdotal, these similarities do a great deal to build trust.

More prosaically, it is just as important to underline the **interests shared by the respective stakeholders**. Although the interests of two people always diverge in some way, anything that shows that the attainment of the objectives of one party will help the other party attain theirs tends to reinforce trust. French companies such as Total, Bouygues and Safran show their understanding of this principle through a strong employee shareholding plan. Indeed, industrial relations conflicts are observed to be less severe at these companies thanks to the resulting convergence of the interests of shareholders and employees.

Checklist

Have you established the **CLOSE LINKS** needed to foster trust?

- Above and beyond apparent differences, what do you have in **common**? Have you discussed your values, experiences and convictions? Do you share your interests and hobbies outside the company?
- What are the **visible signs** of your similarities? Do you belong to the same teams or clubs? Do you share a common language? Do you use "we" rather than "I"?
- Where do your personal interests and objectives **overlap**? Are you transparent about your objectives? Are they compatible? How could they be mutually reinforcing, at least in the long term?

"If you trust yourself, you will inspire others to trust you."

Goethe

3rd condition of trust

Demonstrate your **performance**

As credible as a person may be, trust requires tangible proof that it is merited. Producing the results expected is an indispensable prerequisite to maintain trust.

Inspiring trust with results means **proving your competency**, through past successes, diplomas or certifications, testimonials of satisfied customers, or a "sample" of what you are offering. These justifications may seem unnecessary if you are certain you possess the required skills, but they are essential to reassure someone who hesitates to grant their trust. Indeed, trust is never given once and for all, but in specific situations requiring speci-

Nothing serves to inspire trust if the results do not follow.

fic skills. This is the mistake made by George Bush when he entrusted to Michael Brown the management of Hurricane Katrina in 2005. Given that the skills of the Federal Emergency Bureau head did not cover flooded coastline disasters, Bush's trust was unjustified.

It is just as critical to **demonstrate that you have the resources** to meet expectations. Military parades, for instance, are designed to inspire trust by concretely demonstrating the power of available resources. Finally, it is a good idea to provide reassurance regarding your ability to react to the unexpected by establishing suitable verification and response systems.

Checklist

Can you provide proof of your **PERFORMANCE**?

- How will your **skills** enable you to meet your obligations? What is your history of success? What have you learned from your failures?
- What **resources** do you have available to keep your promises? Will these resources help you deal with the unexpected? Will you know to ask for help if necessary?
- Are your commitments **up to expectations**? Can the other person count on you to do your utmost to succeed? Have you proven this in the past?

4th condition of trust

Be predictable

Checklist

Do you try to be **PREDICTABLE**?

- Are your commitments **credible**? Have you always been reliable in keeping your commitments? If not, did you let the other person know and explain the reasons?
- Do you clearly assert your **values**? Do you explain how your decisions reflect these values? Do you take the time to discuss this?
- Are you **consistent**? Do you take a step back to make sure you act consistently with your promises? Are your messages consistent over time and in different situations?

Before trusting someone, we must feel relatively sure that we can count on that individual to meet his or her obligations.

Clarifying commitments and expectations is thus a basic building block of trust. Too often, the parties to an agreement develop their own interpretations of the promises made, leading to stinging disappointments. For example, the CEO of Procter & Gamble, Robert McDonald, provided a credible description of the values he wanted to promote and how they should be manifested in day-to-day behavior. Understanding what was expected of them, company employees and partners were willing to play the game and give their trust.

You can't trust someone who is unpredictable.

Of course, clearly expressing your intentions also goes hand in hand with **keeping your promises**. Without integrity, trust is impossible. It is thus very important to be careful to “walk the talk.” *The Decision to Trust* cites the example of a partner in an American

consulting firm known to be brilliant and creative. The only problem was that he tended to promise too

much, and the team often could not deliver on his commitments. Clients gradually refused to work with this partner, even though they greatly valued his contribution, because his lack of predictability undermined their trust in him.

An extreme example

How did Bernard Madoff manage to inspire such trust that he was able to get intelligent and educated people to invest in his “Ponzi scheme” for over thirty years? He effectively combined all the ingredients of trust:

PROTECTION	Extremely high profits over a very long period gave investors a false sense of security.
CLOSENESS	Many of Madoff's customers came from his philanthropic circles and “friends of friends.”
PERFORMANCE	Madoff created an image of extreme competency thanks to the longstanding history of his funds' extremely high performance.
PREDICTABILITY	Regular results, no surprises on management costs. Madoff kept his promises for a long time!
PROACTIVE COMMUNICATION	His communication actively supported the image of a gifted and trustworthy trader.

Based on *The Decision to Trust*, Robert F. Hurley, Jossey-Bass, 2011.

5th condition of trust

Communicate proactively

Checklist

Are you careful to communicate your trustworthiness **PROACTIVELY**?

- Do you take the **initiative** to communicate proactively with everyone? Do you engage in informal discussions above and beyond the strict minimum required to get the job done?
- Do you communicate **transparently**? Do you share your doubts and feelings easily? Do you carefully ensure the dissemination of strategic information?
- Do you raise **sensitive issues**? Are you careful to rapidly defuse latent conflicts or rumors?

Trust is first and foremost a matter of human relations, and mistrust most often arises in situations where communication is poor. By the same token, people won't trust you just because you deserve it.

To inspire trust, you must communicate carefully to **build your reputation**. For instance, Jeff Immelt, the CEO of General Electric, made it a principle to conclude every management meeting with a review of the company values and how they are upheld. By repeating this message consistently, he managed to make integrity a key element of his image.

Communication works effectively

Being trustworthy is not sufficient to inspire trust.

only if it goes both ways. **Listening carefully and validating that you have understood** the other person is thus a major driver of trust. A manager recounts that reformulating the expectations of an employee made him aware of the gap between them. He initially

thought that the employee wanted him to show his trust by allowing the latter to take more initiative, while

the employee made a point of demonstrating his trustworthiness by submitting detailed reports and systematically asking for support to make decisions. The ensuing dialogue helped to restore a relationship unencumbered by these misunderstandings.



Trust to be trusted

The stakes

Trust is a mutual feeling. The more someone trusts us, the more likely we are to trust them. Conversely, it is very difficult to trust someone who is wary of us. Imagine a colleague who asks you to confirm everything you say in writing, "just in case." Would you be inclined to trust that same person, when in turn you may have cause to rely on him? However, the propensity to trust is eminently variable from one person to the next. Personality, past experiences and personal issues play a big role. To inspire trust more easily, you are thus advised to develop your own ability to trust others.

Three personal factors conducive to trust

Three dimensions influence our propensity to trust others.



One-on-one check-in meeting template

1. How are you?
2. Yesterday/ On <day>, you said success was going to be _____, how did you go?
3. What are the current priorities?
4. What will success look like today/ for the next couple of days?
5. Are there any barriers to success?
6. What assistance/ support do you need from me?



Set the stage for **productive cross-unit collaboration**

The challenge

An excess of organizational silos can lead to considerable dysfunction. Focused on their own objectives, teams tend sometimes to inadvertently act to the detriment of other entities, thereby harming the performance of the organization as a whole. Furthermore, even when this lack of cooperation causes no harm, opportunities for improvement may be lost, such as better coordination of efforts, better flow of information, or sharing of best practices, all of which are indeed decisive factors in improving performance.

Some key principles

Collaboration is far from a spontaneous behavior. In the short-term, it is sometimes easier, faster and even less risky to concentrate on one's own objectives. You should therefore actively encourage the people who work with you to cooperate with other entities, by creating the conditions favorable to doing so:

Make everyone's roles and responsibilities clear

We are more likely to go to someone when we know what they can provide or what they expect from us. However, in most companies, people don't really know what colleagues with whom they do not regularly work actually do.

- ▶ Clear and up-to-date information on each person's role can facilitate interaction.

Examples:

- Distribute a brief, but accurate description of each person's job.
- Bring in the manager of another department to present the functions of his team.

Foster personal relationships

Collaboration is based on trust: people are more willing to share information or make an effort when they know that others will not seek to gain from it at their expense. Trust, however, is more easily established between people who know each other: a history of good relations renders any uncertainty less worrisome, it is easier to anticipate the other person's reactions, etc.

- ▶ Organize in-person meetings between people who need to collaborate:

Examples:

- Inter-departmental meetings, cross-functional teams.
- Outdoor seminars, fun activities, etc.

Awaken a sense of belonging to a community

Collaboration rarely brings direct gains for the person offering his or her services and, in the short-term, is often perceived as a waste of time! It is therefore important to give meaning to the collaboration effort.

- ▶ Mobilizing the efforts of all to serve interests which go beyond individual concerns is an effective way of encouraging cooperation. To do this, you need to try to create a collective identity:

Examples:

- Highlight collective objectives.
- Develop and run job-specific communities.
- Distribute an internal newsletter by division.

Develop a culture of solidarity

If cooperation remains purely tactical, it may not last very long: silos will reappear at the slightest sign of tension. Corporate culture plays an essential role in maintaining mutual cooperation.

- ▶ Promote solidarity as a key value for the company or for your team.

Examples:

- Be clear and explicit regarding your expectations, in particular in your speeches.
- Set an example.
- Reward individuals who show the relevant exemplary behavior.



Formulate objectives that effectively spur people into action

The challenge

Managers know that objectives are necessary to guide their teams and stimulate them to action. However, formulating effective objectives is not as easy as it may seem at first glance. People are all too frequently discouraged by objectives they feel are unrealistic or often respond to their objectives in a way that is not in line with the manager's expectations. Moreover, poorly expressed objectives can produce conflict and resistance by leading to situations in which subordinates are convinced that they have done what was expected of them, only to find that the boss is disappointed with their performance!

Define "SMART" objectives

SMART is an acronym that will help you memorize the five key characteristics of an effective objective:

<p>S</p>	<p>Stretch An objective is all the more motivating when the subordinate feels satisfied and proud to attain it.</p>	<ul style="list-style-type: none"> Propose a challenge that requires a certain amount of effort. Explain to the subordinate what he or she will gain from achieving it. 	<p>Example</p> <ul style="list-style-type: none"> "Now that you understand the technique, you can take charge of managing the project. This will prepare you for a managerial role."
<p>M</p>	<p>Measurable What defines success must be as clear as possible. In addition, measurable objectives enable to track progress and take corrective actions if needed.</p>	<ul style="list-style-type: none"> If possible, define quantified indicators. When this is not possible, specify "deliverables". Establish the means to measure progress. 	<p>Examples</p> <ul style="list-style-type: none"> "Answer 95% of customer requests within 48 hours," if the system can track this information. "Develop a chart to track various ongoing projects, and update this chart weekly."
<p>A</p>	<p>Action-Oriented The subordinate must clearly understand what is expected of him or her in order to facilitate action as well as performance assessment.</p>	<ul style="list-style-type: none"> Concretely describe expected initiatives, behaviors or results. Avoid vague and ambiguous terms. Also specify what is not expected. 	<p>Examples</p> <ul style="list-style-type: none"> "Answer calls before the 3rd ring" rather than "Improve phone call reception." "Reduce time to market for new products by five months" rather than "Accelerate innovation."
<p>R</p>	<p>Realistic An objective that seems unattainable can be demoralizing to a subordinate who feels that failure is the only possible outcome.</p>	<ul style="list-style-type: none"> Take account of available resources, the subordinate's skills and the context. Try to gain the adhesion of the subordinate. Define objectives that the subordinate truly has power to influence. 	<p>Examples</p> <ul style="list-style-type: none"> "Ensure that the IT system is operational 99% of the time" rather than 100%. "Increase sales to existing accounts by x%" rather than "Increase customer satisfaction" for salespeople who have no influence over product quality.
<p>T</p>	<p>Timely A deadline is very stimulating. Establishing a calendar also makes tracking progress easier.</p>	<ul style="list-style-type: none"> Set a deadline by which the objective must be attained. Define milestones and intermediary objectives if the deadline is far in the future. 	<p>Examples</p> <ul style="list-style-type: none"> "Cut the defect rate in half by the end of the year." "Develop specifications for March 30, a preliminary project by May 15 and a test version by June 1."



Foster a sense of accountability

One of the greatest frustrations of managers is the sense that their employees do not feel like true stakeholders in their team or company. Of course, most do their job just fine, and complete every task they are asked to undertake. In this regard, they have done nothing wrong. However, they do not share a sense of responsibility for the success of the team or the company.

Accountability means more than just "doing a good job."

Commonly, only a handful of employees demonstrate a true sense of accountability, and this has very little to do with their level in the hierarchy. Indeed, a customer rep may be ready to do whatever is needed to ensure the satisfaction of his customers, while the regional director blames headquarters for the drop in the level of satisfaction ... Such a lack of a sense of responsibility is particularly harmful. First, it is detrimental to the labor climate and motivation, to the extent that those involved

feel that they are being treated unfairly. Second, it saps performance, which depends on the ability of every member of the organization to stay attuned to what is needed, propose innovative solutions and take initiative. In short, they must feel accountable for the overall mission, and not focus exclusively on properly completing specific tasks.

However, inspiring a sense of accountability is a particularly difficult job. Indeed, managers and executives often find themselves confronted with employees who, with the best of intentions, simply cannot seem to take responsibility. There are three main reasons for this:

They do not understand what is expected of them

Responsibility is an abstract concept, which different people interpret in different ways. An employee may well be dumbfounded to hear that his manager doesn't think he is taking enough responsibility, because he thought he was doing everything in his power to do a good job! However, his efforts concern areas that are not particularly critical in the eyes of his boss. So, **how can you communicate your expectations concerning accountability?**

They find it easier to hold back

Assuming responsibility means taking risks. People feel more at ease performing clearly defined tasks perfectly than taking the initiative to do more than what is explicitly laid out for them. They may thus consciously or subconsciously avoid taking initiatives that could get them in hot water. So, **how can you reassure people and convince them to take broader responsibility for their jobs?**

Passivity does not have consequences

Lastly, the lack of a sense of accountability can be largely explained by the fact that the business doesn't really reward it. Why make an effort only to be rewarded essentially by an increased workload? Indeed, leaders logically tend to entrust the most important and stimulating assignments to those who show their commitment, while those who hold back have things easier. So, **how can you align your reward systems with your expectations?**

Act in four ways to foster the sense of accountability in your organization.

- 1 Express clear and credible expectations
- 2 Specify role allocation
- 3 Openly discuss accountability issues
- 4 Truly reward accountability

1st tip

Express clear and credible expectations

Tip

To clearly communicate what you want an employee to do or not do:

- Ask the person to imagine he or she has a 36-hour day and an unlimited budget:
 - What would the person do that they're not doing today? What important subjects would the person start tackling? Where would the person spend more of his or her time?
 - Within the scope of his or her time and budget constraints, what could the person change to bring the situation closer to the imagined ideal? What less important things could he or she eliminate?
- Compare your respective points of view.
 - What do you think should come first in the person's job?
 - What aspects are undesirable or could be eliminated?

Based on *No More Excuses*, Sam Silverstein, Wiley, 2010.

"The price of greatness is responsibility."
Sir Winston Churchill.

Ignorance is one of the greatest causes of the lack of accountability. Because they don't understand what is expected of them, employees simply execute the tasks that have been explicitly assigned to them, or take initiatives that do not meet the expectations of their superiors. This gap creates the perception that they lack a sense of accountability.

How to verbalize what you expect of your employees may seem obvious. Most managers communicate operational objectives and list the principal tasks to be carried out. However, accountability involves expectations of a different nature altogether. How should incidents be handled? How much initiative should an employee take? What types of interaction should one have outside official channels? How should conflicting priorities be managed? Etc.

Hence, **clearly establishing some basic principles** is just as important as clarifying your concrete expectations. Rather than giving a long explanation, you do better to lay out some clear and simple principles covering a sufficiently broad scope to make everyone feel affected by their implemen-

tation. Gus Levy, managing director of Goldman Sachs in the Seventies, asserted: *"At Goldman Sachs, we want profits, but we want long-term profits."* This no-nonsense phrase gave employees a framework to tackle dilemmas with a sense of responsibility, and encouraged them to ask themselves *"Is my decision consistent long-term profitability?"*

And just as important as asserting your expectations, you must also **set limits** and specify what you don't want people to do. Take the example of Jack Brennan, chairman of the Vanguard management company, who likes to repeat, *"At Vanguard, mistakes are allowed. But one ethical misstep and you're out. A gift accepted from a client and you're out. Etc."*

Lastly, **prioritizing your expectations** is also essential. Your list of expectations won't be credible if they aren't mutually compatible. The owner of PetroVietnam refineries, Nguyen Toan, defined three priorities in this manner: safety, quality and productivity. However, he states, safety comes first. Thanks to this attitude, he can boast one of the lowest accident records in the industry, with one broken leg per ten million hours worked over seven years.

To be accountable, you have to understand your responsibilities.

State your expectations explicitly

Being clear about what you expect is the best way to get those around you to behave responsibly.

5 KEY COMPONENTS OF A REQUEST

ADVICE

Who is making the request?	Use the first person if you are making the request, or specify if you are making the request on someone else's behalf.
Who is receiving the request?	"You need to do such and such" is not sufficient. Specify whether you are expecting direct involvement from the person or from a member of his/her team.
What specific actions do you expect?	Don't just "hope" that the job will get done according to your expectations; if a particular approach is important to you, say so!
What criteria must be met to satisfy you?	Try to establish concrete criteria to enable the person to evaluate whether or not you are likely to be satisfied.
When do you expect results from this request?	Specify the date when you want to see your request fulfilled, and possibly a progress report schedule.

Based on *Leadership Without Excuses*, Jeff Grimshaw, Gregg Baron, McGraw-Hill, 2010.

2nd tip

Specify role allocation

As people work increasingly across organizational lines, they also frequently run into grey areas, where each party thinks that the other will take care of a particular task or problem. Who should reserve the conference room? The person who called the meeting or the person based in the office where the meeting will take place? If this is not clarified, there is a big chance the room won't be reserved at all! This phenomenon occurs regularly on much more critical issues, and reflects a **lack of clarity concerning roles, which in turn causes people to fail to take responsibility.**

The author of *Leadership Without Excuses* recommends that managers assume that roles are not well understood until they have proof to the contrary. They must therefore **devote**

Clarifying roles prevents people from dodging their responsibility and passing the buck.

a **significant amount of time** to agreeing precisely "who does what." Jim Crawford, IT director of a leading U.S. healthcare firm, testifies to the virtues of patience in this regard. Transferred to France when he spoke practically no French, he was not able to give his usual clear directives because of the language barrier. His employees consequently had free and open discussions on how to execute their assignments, taking what seemed like an eternity to come to an agreement. To his great surprise, these in-depth discussions on role allocation had a spectacular benefit – everyone was fully on board!

Clarifying roles and the chain of responsibilities is a good way to prevent those involved from using system flaws as an excuse when things go wrong.

3rd tip

Openly discuss accountability issues

Lack of accountability is an insidious problem. Rarely discussed openly, or even considered seriously, irresponsibility is generally reflected in many small daily details, rather than in spectacular observations. Most often, a manager regrets that an employee didn't do something he could have done. However, it is more difficult to criticize someone for not doing something than for doing something wrong. First, the concerned individual could easily interpret this as an accusation of bad faith. Second, the person might ask for even more specific instructions, e.g.: "So tell me exactly what I'm supposed to do then!" Yet, the whole point is to put the employee in a position where he or she feels accountable for deciding what he or she must do,

Accountability issues cannot be left unaddressed.

within the scope of a well-understood overall mission.

Tackling accountability issues takes courage. These discussions are essential, but difficult and risky. To avoid these sensitive conversations, executives often close their eyes, and let things slide, at the risk that they will slide downhill! In a contrary example, one leader cited in *Leadership Without Excuses* formed a habit of reading all the 360° evaluations completed by employees. If the results did not seem crystal clear, he sent them back. In this way, he habituated people to saying things openly. The objective is to encourage open discussion without giving employees the perception they are being personally accused or unfairly judged.

The RACI matrix

The mnemonic acronym RACI provides a structure to specify each participant's type of involvement for each listed project task.

Responsible

Who is operationally in charge of executing the task?

Accountable

Who must approve choices made and the proper execution of the task? (1 person)

Consulted

Who must be consulted on choices made or the proper way to execute the task?

Informed

Who must simply be kept up to date on progress or choices made?

Practical Tips

If one of your employees appears to lack a sense of accountability, you must lose no time in speaking openly about this issue with the individual concerned.

- **Support your message with facts.** Differentiate between fact and opinion. Beware of accusing the other person of bad faith.
- **Focus the discussion on the consequences of observed behavior.** Try to help the person understand the gaps and improvement needs, rather than debating the causes. Don't let the discussion turn into a self-justification session.
- **Speak in the first person.** Explain what you feel about the situation, as this will bolster your credibility.
- **Admit your own share of responsibility in the situation.** Recognize mistakes that you may have committed, for example, by not being sufficiently clear about your expectations.

"Delusions are much sweeter, but they make you vulnerable."

Jeff Grimshaw, Gregg Baron, *Leadership Without Excuses*, McGraw-Hill, 2010.

4th tip

Truly reward accountability

Examples

Chris Franklin, CEO of the Aqua America water distribution company, noted upon his arrival that the productivity of meter readers varied widely on a scale from 1 to 5, a state of affairs that his processor had tolerated for years.

Franklin went out into the field to study the situation firsthand. He discovered that the reason for the situation was the perception of inequitable treatment. Two employees had been behaving in a completely unacceptable manner, taking time off during working hours to run personal errands. Seeing that this behavior was not penalized, many of their colleagues gradually lost their motivation and began to take it easy themselves.

Franklin took rapid measures, firing the two "black sheep," who had refused to change their behavior. He explained to the others that their past behavior would not be held against them, but that he expected them to show more commitment henceforth.

In just a few weeks, the team got back to work and the labor climate improved considerably.

Based on *Leadership Without Excuses*, Jeff Grimshaw, Gregg Baron, McGraw-Hill, 2010.

Many leaders adopt an attitude that is not aligned with their accountability expectations. First, because defining concrete indicators for such an abstract concept is difficult, they often manage accountability as a "plus" which is not explicitly integrated as a compensation criterion. As a result, **managers often end up rewarding counter-productive behavior, but continue to hope that other people will "do the right thing."** This happens, for example, when call centers are run based on productivity, but managers still hope that operators really listen to their customers. Another frequent problem is that **those**

who act responsibly often see themselves recognized with "rewards" that aren't very rewarding, as they are typically given jobs that no one else is responsible enough to do! Even thanks may be perceived as insulting in such a context, points out one executive: *What I hear between the lines is, "I don't have the courage to solve the problem of people who lack a sense of responsibility, so thank you for being stupid enough to do the job for them!"*

To avoid this phenomenon, leaders must **stop making accountability an implicit expectation, and instead take visible and concrete measures**

to encourage it. Sometimes, this simply requires adjusting performance criteria. For example, the Vanguard management company initially believed that managers would naturally try to develop their employees. This mindset was long considered to be a matter of personal goodwill. Managers who did this were recognized by their superiors, but the concrete impact on compensation and promotion practices was far from clear. Senior leaders decided to change this state of affairs and instill performance indicators in

this domain – with spectacular results!

However, "acting responsibly" is extremely

difficult to translate into an indicator. Rather, this topic must be openly discussed during performance reviews, just like other skills. The whole point is thus to address the topic of accountability on an objective and factual basis; otherwise, if the concerned employee feels unfairly judged, the message is likely to be rejected. Managers are thus advised to **focus on the consequences of observed behavior.** For example, what would happen if the entire team began to act the same way? More importantly, how does this behavior affect the person's performance and career development perspectives?

Behaviors must have consequences.

Adapt your rewards to your expectations

REWARD THE SENSE OF RESPONSIBILITY

There are many ways to reward employees who demonstrate a great sense of responsibility:

- Variable compensation, pay raises
- Increased involvement in decision making, access to confidential information, consultation on cross-company issues
- Sincere thanks supported by facts, public recognition depending on the person's personality
- Flexible schedule, more vacation time
- Special attention to the person's specific needs
- Status, title
- Additional resources (budget, bigger team, administrative support)
- Development opportunities, mentoring, time spent coaching the person

PENALIZE IRRESPONSIBILITY

When people fail to assume their responsibilities, there are measures that can be taken to underline the fact that passive behavior has negative consequences:

- Stress that the person is losing the trust of other team members
- Post comparative performance
- Present the issue as an internal competition that the person is losing
- Describe the person's behavior in explicit terms, to open the person's eyes if he or she is lying to himself/herself.
- Refuse to entrust the person with an assignment, and tell him or her why
- Explicitly take account of the person's behavior when determining variable compensation



Making **feedback** a key performance driver

The challenge

Telling your team members what you think of their performance is a delicate task, and may make you feel uneasy. As a result, many managers prefer to limit themselves to performing formal annual performance reviews or making comments here and there when someone makes a mistake. Unfortunately, they are depriving themselves of an effective tool to manage performance. Indeed, feedback not only provides people with input on how to improve, but also encourages their efforts by recognizing their achievements and reinforcing the quality of their working relationship with you.

Five key success factors

There is no magic formula for giving feedback: you must adapt your approach to the person concerned, the desired results, and the context. But you can still optimize your chances of success by applying the following tips.

1

Seize every possible opportunity to give feedback

Lasting support is required to help someone grow and develop. Feedback is also much more effective in trusting relationships, which can be established only over time:

- Provide feedback not only on **performance**, but also on **behavior** and **work methods**.
- Feedback can take **different forms**. E.g.: identifying a problem to solve, suggesting different work methods or behaviors, offering support, etc.
- Remember to express both **what is working and what isn't** – while underlining improvement opportunities.

2

Set the stage for success

Rather than talking to people haphazardly when you run into them in the halls, create conditions conducive to effective feedback:

- **Avoid** giving feedback in **the heat of the moment**. Conversely, **don't wait too long** after the event you want to discuss: People must clearly remember what happened and you will avoid giving the impression that you were brooding or hiding your feelings.
- Take the **time needed** to discuss the subject fully and draw appropriate conclusions.
- As much as possible, give **face-to-face** feedback in a **location well-suited to dialogue**.

5

Banish certain attitudes

Throughout the discussion, be careful not to get your counterpart's back up:

- **Avoid judging prematurely**: you may put the other person on the defensive, and thus keep him or her from thinking rationally.
- **Let the other person have his or her say**: don't answer your own questions and avoid closed questions.
- **Restrain your exasperation**. Beware of non-verbal cues (eye or body movements, tone of voice) that could reveal your frustration.
- **Place yourself on equal footing**: you won't get sincere commitment using authority.

3

Dare to express yourself clearly

Ambiguous or incomplete feedback can have an opposite impact from what is desired.

- **Be frank**: avoid euphemisms, use precise terms, and don't water down criticism.
- **Distinguish** between the **facts** and your **interpretations** or **emotions**. E.g.: "Yesterday, when such-and-such happened, I concluded... This annoys me because..."
- Be **comprehensive**: Support your arguments, develop your analysis, and don't censure certain facts.

4

Ensure real dialogue

Work to arrive at a shared understanding of the situation, rather than merely express your own point of view.

- **Listen** to the other person's point of view: try to **understand** before trying to persuade.
- Be **willing to change** your mind, and even to **receive feedback** in return for yours!
- **Ask** the other person to propose solutions, and what he or she thinks of your ideas.



Cultivate social networks

Use networking to break down organizational silos



Didier Avril, série Storytelling

Our sources

This synopsis is based on the publications presented below and on the back page.

The Hidden Power of Social Networks

Rob Cross, Andrew Parker, Harvard Business School Press, 2004.

Never Eat Alone

Keith Ferrazzi, Currency Doubleday, 2005.

Social networks have not always had a good reputation. Although they are sometimes recognized as necessary for success, they are often associated with unscrupulous social climbers willing to do anything to get ahead, or with people who want to influence things behind the scenes for dubious motives.

This image does have some truth to it. However, it would be a pity to stop there without acknowledging the truly positive side of networks. For organizations, active social networks can be a valuable way to combat organizational silos and thus accelerate the flow of information, facilitate effective decision-making, and encourage people to take initiative.

Managers would therefore benefit from getting involved in the development of such networks, both for themselves and for the members of their teams. To achieve this goal, the publications we have selected provide several tips, of which several stand out in particular:

- **Think of building your network not simply as a way to advance your own interests, but rather as a part of your social life that enables people to help and support one another more effectively.**
- **Analyze the networks of your subordinates and work with them to resolve any deficiencies.**
- **Encourage your subordinates to develop personal links with one another and to expand their networks to other parts of the company.**

In this synopsis...

- 1 The value of social networks
- 2 Develop your network
- 3 Support networks

1 The value of social networks

Social networks don't have a particularly flattering image. They are certainly seen to be critical to success in some arenas, particularly those involving sales and business development. However, social networks are often associated with more or less underhanded means by which individuals advance their selfish interests to the detriment of the common good. The typical "networker" has the image of someone who

Although social networks are often viewed with suspicion, they can be very useful to companies.

is quick to distribute business cards, is not particularly honest, and is willing to stoop to hypocrisy in order to fill his or her address book with good contacts.

This stereotype does have some truth to it. Nonetheless, it would be a mistake to assume that anyone who makes an effort to develop and maintain a network of contacts must have reproachable motives. The publications that we have selected show that the clichés surrounding networking (Figure A) are often unfounded. In particular:

Effective networks cannot be maintained without sincere caring

The unpleasant attitudes often associated with the image of networking turn out to be ultimately counterproductive. Indeed, two things are needed to network effectively:

- **People must truly get along.** Networking efforts are often thought to be driven by immediate personal interest. It is consequently often assumed that a good networker must be hypocritical toward people he or she doesn't like if some benefit can be derived from the relationship. This conception is false. Indeed, this sort of attitude generates merely utilitarian relationships which are often limited to exchanging favors from time to time or to sharing scant information. To the contrary, mutual esteem fosters more enriching relationships and is ultimately more beneficial for everyone concerned.
- **Networks must be based on authentic generosity.** "Jaded networkers" generally try to use their contacts to serve their own selfish interests. However, this behavior rarely pays in the long term – who wants to help a blatant social climber? Those who manage to build the most complete – and ultimately the most effective – networks

do just the opposite. That is, they try to do nice things for people they know without expecting anything in return. In this way, they generate real feelings of gratitude and respect, and can thus build lasting relationships founded on mutual trust and sincerity.

Effective personal networks therefore rarely emerge from purely utilitarian relationships. In addition to giving people the pleasure of relating to others, interpersonal relationships generally facilitate the achievement of personal objectives: they facilitate access to the right information and to the right people at the right time, they ensure that one gets the support he or she needs, etc. However, people who have built a solid capital of trust over time find it easier to reap these benefits than those who attempt to exploit a list of superficial contacts opportunistically.

Social networks are as useful to the organization as to individuals

Networks are an essential part of organizational life, without which companies would find it difficult to function properly. Networks are often wrongly seen as exclusively promoting the selfish interests of isolated individuals. Yet, a network also benefits the circles in which a given individual moves:

FIGURE A Some unfounded clichés...

Networking, an activity that consists in actively building and maintaining a network of contacts, is subject to a number of unflattering stereotypes that do not always correspond to reality.

It is often thought that...

Yet, it is often true that...

Networking consists in developing contacts with a definite goal in mind.	Networks are most effective when the underlying relationships are based on a longstanding bond of trust, rather than on superficial contacts developed exclusively for opportunistic reasons.
Networks work primarily based on mutual favors ("I did you a favor, now you owe me one").	The quality of human contact is fundamental when developing relationships. Keeping strict accounts of services rendered makes relationships purely utilitarian and dooms them to dwindle away.
Good networkers are very social people with a gift for that sort of thing.	Networkers have a wide range of personalities. In any case, fast talk and a big ego are not much help in building solid relationships.
Networking necessarily requires people to compromise themselves and be hypocritical.	Being yourself is the golden rule for building healthy relationships and real trust with other people.
The success of networking depends on the number of relationships you establish with "influential people."	Parameters like the level of trust, the different kinds of people you know or the ability to mobilize the members of your network are just as important as the number of contacts in your address book.

- **Information circulates better.** Information generally circulates better through social networks than through official channels, because it reaches those concerned very rapidly and is often transmitted through dialogue that is richer than a simple official announcement. The internal networks maintained by the members of an organization thus play an important role in ensuring the efficient flow of information and are a good complement to official communication channels.
- **Silos are broken down.** The ability to mobilize the knowhow of individuals and get the members of the organization to collaborate actively is recognized to be critical. The personal network of contacts of each member of the organization can contribute to this goal. Such networks help people find out what is happening in other parts of the company and take account of the issues of other departments. Moreover, they are instrumental in creating a feeling of belonging to a community that cuts across geographical, functional and hierarchical boundaries.
- **Decision making is more consensual.** Networks are effective in helping to forge a collective mindset, gather opinions and test reactions. In this regard, they are an effective tool for engaging a large number of people in the decisionmaking process and ensuring that decisions are accepted by the largest possible number. So, it is important not only to have your own good network, but also to encourage others to develop one of their own. We shall see that this involves doing two things simultaneously:
 - Optimize the time devoted to developing your network;
 - Establish an environment that is conducive to network-building by the other members of the organization.

2 Develop your network

Many people would like to spend more time developing their networks, but find it difficult to fit this objective into their schedules. There are two ways to overcome this challenge:

- Target your efforts;
- Optimize the work required to maintain your contacts.

► Target your efforts

Given the time required to build and maintain a network, relying purely upon chance meetings would be a mistake. To build a good professional network, a targeted strategy must be pursued with perseverance:

▮ Clarify your objectives

If you do not direct your efforts toward a clearly delineated goal, your network is likely to be inconsistent and inefficient. You must consequently define your networking strategy to meet specific needs. For example, depending on whether you want to build your career in a profession or in an industry, the kind of network to develop will not be the same. Moreover, you should identify departments

A certain level of discipline will help you fit network-building into your schedule.

in your company with which it would be helpful to cooperate smoothly, or with which you would like to develop a closer relationship. Your networking objectives may also concern your interests outside work. Do you want to play a role in your city, in politics or to serve a social or humanitarian cause? The point is not so much to have a single objective as a clear idea of the type of contacts you would ideally like to develop over time.

▮ Identify people you want to meet

Once you have clarified the arenas where you want to develop your network, such as the marketing department of your company, an industry or a professional circle, you should develop a list of the ideal contacts that you would like to make. For instance, this could be a specific expert, a given company, the head of a non-profit organization, etc.

▮ Implement a strategy to open doors

It is often difficult simply to go out and meet the people on your ideal contact list. However, analyzing this list will help you understand the types of contacts that would be likely to lead you to a given person one day or another, and imagine how to direct your efforts accordingly. Often, the best place to start is with the people you know, e.g. your friends, family, colleagues, school alumni, etc. You could start by simply asking them to whom they could introduce you. You can then capitalize on these new relationships to pursue your strategy (Figure B). Many other drivers are also available, of course, such as volunteering for a cross-functional project, working for a non-profit, joining a club, attending conferences to make contacts during breaks, etc. You can also try to make yourself more visible to make others want to meet you. This can be done in different ways, depending on the context. You could write a report, circulate a memo, publish an article, join the board of a non-profit, etc.

► Effectively maintain your network

Maintaining your network takes a lot of time once you acquire a large number of contacts. Yet, this task is essential and will determine your ability to call upon these contacts when the day comes. You must therefore use a methodical process and ensure that it fits as well as possible into your regular activities.

▮ Schedule periodic "booster shots"

Regular contact is essential to maintain relationships. Yet, don't hesitate to adjust the frequency of these contacts depending on the importance you accord to each relationship. For example, some networking experts recommend classifying your relationships into different types and deciding how frequently you should telephone or e-mail each type. You might decide, for instance, to make monthly calls to

most strategic contacts, quarterly calls to people with whom you would like to maintain an active relationship, and yearly calls when you simply don't want to lose sight of someone. Planning this schedule on a computer or an electronic agenda will keep you from falling behind and from letting your network deteriorate.

Offer added value to each contact

A simple e-mail "to say hi" has little chance of making an impression on the person who receives it. Yet, to maintain the relationship, each interaction must leave the other person with an impression that is as vibrant as possible. Think to include small details that will lend particular interest to a phone call or an e-mail, such as a photo of your last meeting with the person, a copy of an article, notes on something interesting you have read recently or the title of a good book. Such details may help or please the other person and also help him or her remember you. These are just several examples among possible inexpensive things you can do to make the contact stand out and keep it active.

Systematically organize group meetings

Whenever possible, don't hesitate to arrange a meeting with several people at the same time, for example, for a meal or a sports event. Face-to-face conversations are irreplaceable to maintain a relationship, but it is difficult to find the time to meet each contact individually. This problem can be solved by organizing meetings with several people at the same time. This arrangement also gives an opportunity for your contacts to meet one another, which will in turn help them develop their respective networks.

3 Support networks

Some contexts are more favorable than others to network building. Managers must therefore make sure that the environment in which their team operates is favorable to it. There are three main ways to do this:

- Analyze the networks in the organization;
- Ensure that team members know their colleagues and understand what they can contribute to one another;
- Encourage people from different departments to meet and collaborate.

► Analyze the networks in the organization

Analyzing the networks in a team or organization does not necessarily require the help of specialized experts. Ordinary managers can personally conduct such an analysis and derive relevant conclusions. This task is facilitated by breaking down the analysis process into three key steps:

Map the network

The point of this exercise is use interviews or surveys to evaluate the contacts that each employee maintains with the other members of the team. The precise type of questions posed will naturally depend on the context

There are a number of ways for managers to help their subordinates establish effective networks.

and targeted objectives. For example, focus could be placed on the quality of mutual support and cooperation, the speed of access to information, and the effective utilization of available expertise. Based on this analysis, a map of existing networks can be drawn

FIGURE B Transforming contacts into relationships

When you meet someone in a formal setting, you may have just a few moments to start a friendly relationship. The following recommendations can help you achieve this:

- **Prepare for meetings.**
When you attend a conference, a trade show or any other gathering, you should arrive knowing beforehand who you want to meet and how you intend to go about meeting them.
- **Find something in common with your contact targets.**
Research the people you want to meet, to find out whether you have something in common with their professional or academic background, geographical origins or hobbies, in order to create a bond from the very start.
- **Go beyond bland niceties.**
Asserting your personality and what makes you different generally makes a bigger impression on other people than merely sticking to social niceties.
- **Offer help.**
People are more interested in maintaining contact with someone who offers to help them and who clearly adds value.
- **Don't reveal everything about yourself immediately.**
Make people curious to know more about you and what you could bring them.
- **Rapidly make contact again.**
If possible, try to set up another meeting while your contacts still remember you clearly.

Based on *Never Eat Alone*, Keith Ferrazzi, Currency Doubleday.

and then employed to understand and improve the situation (Figure C).

Use the network maps to stimulate discussion

Although social networks are often vaguely understood to exist and to be critical, they generally remain invisible. Helping people visualize these networks is therefore very important. The authors of *The Hidden Power of Social Networks* assert that even simply showing department members the resulting map is enough to trigger good discussions on the configuration of the network, its deficiencies and the means to improve it. For example, as a result of these discussions, many people who speak very rarely to one another become aware of the benefit of getting together. Very often, the network is rapidly reconfigured as a result and becomes much more efficient.

Take corrective measures

Some deficiencies highlighted by the map do not always resolve themselves spontaneously. In such situations, managers must make the necessary decisions. Figure D presents several examples of frequent problems and the types of initiative that can be used to resolve them.

► Tell people about the expertise of other team members

Cooperative relationships are not established unless people see the benefit of talking and working with one another. Yet, people working in the same department are frequently unaware of exactly what their colleagues know. The authors of *The Hidden Power of Social Networks* state, for example,

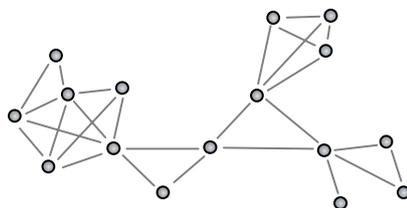
that they have often met people who work in the same office without understanding exactly what everyone else is doing! Managers who would like to encourage network-building must actively combat this phenomenon in the following ways:

Communicate regularly on the role and expertise of respective team members

Periodic updates must be provided on how the company operates, as well as the identity, function and skills of the people who work there. Likewise, explanations on individual roles and expertise should be given whenever the organization changes, or when people leave or arrive in a new position. Experience shows that without such reminders, people quickly forget what their colleagues do when they don't work with them on a daily basis or when their

FIGURE C Map the internal networks of the organization

Developing visual representations of the internal networks of a company can be very helpful in analyzing them. A network map should help visualize the existing interpersonal relationships within an organization. It looks something like the diagram below :



The points symbolize individuals. The lines symbolize interpersonal relationships, established based on the statements of organization members gathered from interviews or questionnaires.

It is possible to draw several maps of the same organization, depending on the angle from which the analysis is conducted. For example:

Angle of analysis

Possible questions

Regular professional contact	With whom do you work regularly in the course of your work? "With whom are you in contact most often?"
Accessibility	"Who can you contact rapidly when you need it?"
Knowledge of the expertise of other people	"With whose skills are you very familiar?"
Access to strategic information	"Who do you call to obtain information essential to the success of your assignments?"
Energy	"Who has the energy to motivate you?" "Who tends to bring you down?"
Type of shared knowledge	"Who do you ask to get new ideas?" "Who helps you when you want to improve processes or methods?" "Who do you ask to find out what is going on in the company?"
Personal dimension	"With whom do you have good rapport?" "Who could you imagine meeting outside work?"

Based on The *Hidden Power of Social Networks*, Rob Cross, Andrew Parker, Harvard Business School Press, and *Karen Stephenson's Quantum Theory of Trust*, Art Kleiner, Article published in *Strategy + Business*, issue 29.

domain of expertise is too remote from their own. For example, a consulting firm decided to establish a department in which half of the members were strategic consultants, and half were IT specialists. Several months later, despite a shared office layout, contact between these two groups was observed to be very limited. The company had been in such a rush to move ahead with the physical integration that it forgot to introduce people to one another, and they continued to function in separate silos.

Capitalize on people with the best “connections”

Understanding the role and expertise of the other people in the organization is certainly important. However, it is equally important to understand who these people know and how to benefit from their networks. By highlighting the role of these “links,” a company established in three continents made great strides in improving cross-border collaboration between units in Europe, the U.S. and Australia. It identified several people who had unofficial long-standing relationships with units on other continents and used these people

as official liaisons. All employees were asked to go through the identified liaisons to get to know their colleagues on the other side of the world who were working on subjects similar to their own. The involvement of these middlemen helped team members target the right contacts depending on their needs. Communication improved fantastically, thereby accelerating the development of global centers of expertise.

Create databases

In large organizations or companies scattered across a number of locations, databases can accelerate network building. Existing information on individual knowledge and expertise can effectively be consolidated in such databases and made available to everyone. This is why many organizations like British Telecom or the World Bank have developed information systems to make it easier for thousands of employees to contact one another. Although such systems are undeniably useful, they are rarely the whole answer. Their effectiveness depends on taking certain precautions, as **Figure E** explains in detail.

Foster the development of personal relationships

Even when people understand what their colleagues do, this is not always enough to get them to cooperate. They must have both a desire and a legitimate reason to contact someone when the need arises. Simply managing a company directory is not enough to create an effective network. Managers must also foster the development of an environment conducive to interpersonal collaboration. Several management practices can be very helpful in this regard:

Encourage autonomy

Many people tend to rely on the boss when they are confronted with a problem that goes beyond their scope of responsibility, or when they are looking for information. A better idea is to encourage people to hook up directly with those who can help them, and give them relevant contact information to do this, if necessary. This helps employees develop their own networks and get used to employing them.

FIGURE D Common network deficiencies

Problem	Possible Solutions
Bottlenecks A person occupies a position that is so central in the network that he or she cannot handle it all and paralyzes the system.	<ul style="list-style-type: none"> Relieve the person in question of some responsibilities. Explain the problem to the other members of the network and ask them to try to contact one another directly more often.
Exclusion of an individual A person has very few contacts with the other members of the network and his or her skills are thus underutilized.	<ul style="list-style-type: none"> Change the person's position in the organizational chart or geographically. Reallocate tasks to the person to facilitate his or her integration.
Closed circuits A team keeps to itself and becomes isolated from the rest of the organization.	<ul style="list-style-type: none"> Bring new people into the team. Try to set up meetings and opportunities to collaborate with other departments. Periodically ask people from outside the team to participate in team efforts and meetings.
Geographical dispersion Geographical distance separates people and makes contact and collaboration difficult.	<ul style="list-style-type: none"> Establish technological solutions to facilitate contacts. Consider a geographical reorganization.
Excessive dependence on one person Information and contacts strategic to the organization are controlled exclusively by one person.	<ul style="list-style-type: none"> Ensure that other team members also have access to these contacts and information. Develop a buddy system, where some tasks are allocated to two people simultaneously.

Based on *The Hidden Power of Social Networks*, Rob Cross, Andrew Parker, Harvard Business School Press.

Foster geographical proximity

The physical layout of the work environment has a considerable impact on interpersonal communication. This fact must be taken into account in order to facilitate contact between people who would benefit from meeting. Chrysler, for example, totally revised the office layout of its new vehicle design department in order to bring designers closer to R&D staff. The resulting contacts greatly improved the flow of the development process.

Don't hesitate to be directive if necessary

Introducing people from different backgrounds is not always enough to ensure the formation of durable relationships. If a manager feels that employees would truly benefit from working together, he or she should not hesitate to push things in the right direction. For example, the manager of an internal auditing department recently created at a bank had to do just that. His department included former consultants, bankers and IT experts. Each group was aware of the expertise of the others, but they were still not cooperating well together several months after the department was created. Seminars were subsequently organized to help people reflect on ways to combine their

know-how more effectively. This effort was demanding, but it enabled people to develop common work practices and get used to capitalizing more fully on the expertise of their colleagues.

Regularly use crossfunctional teams

It is important for people from different parts of the company to have frequent opportunities to meet and collaborate. Actively ensuring that project teams are composed of a diverse range of participants is an effective way to achieve this objective. For example, this approach is frequently used by many consulting firms, which have a strategic stake in sharing and building global knowledge and expertise. Some even include team members from offices in other countries, despite the cost that this adds to the project and despite the fact that local resources may have been available. They do this because they understand that this policy is extremely effective in simulating interoffice exchange and thus greatly enhances the overall performance of the organization.

Recognize the ability to play as a team

The evaluation system should encourage people not only to perform

individually, but also to contribute to collective success and to share their know-how with the other members of the organization. Some companies officially make this an official performance criterion, against which managers are asked to evaluate their subordinates regularly. Others prefer to reserve financial or honorific rewards for people who are seen as the best team players, rather than those who perform the best individually.



Although networking does not always have a particularly flattering image, it is an effective way to break down organizational silos, without necessarily involving the moral compromises with which it is often associated. Managers could therefore benefit from building their own networks, as well as from encouraging their subordinates to do likewise. When this happens, the entire organization wins, as people who feel closer to one another are able to share information more effectively and are more open to outside influences.

FIGURE E Use databases effectively

Many companies have developed databases to help their employees get to know what their colleagues do and where they are located. However, many also admit they are disappointed at how little these tools are used and how little impact they have on collaboration. There are three potential ways to improve this situation:

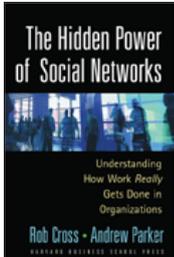
What to do	Why	Practical Tips
Consider databases as a tool that facilitates contact, but is not sufficient in itself	If people are not used to asking their colleagues for help in solving their problems, the best technological tool in the world will not suffice to change their behavior.	<ul style="list-style-type: none"> Start by working to change people's mindset and encourage collaboration.
Describe domains of expertise in a concrete manner	Many databases cite only the diplomas and general areas of expertise of employees. This information is not always helpful in finding someone who can help solve a specific problem.	<ul style="list-style-type: none"> Describe expertise as precisely as possible. Make a concrete list of accomplishments, particularly the most recent, rather than university diplomas or old experiences.
Do not exaggerate expertise	Some databases give the impression that the company contains only high-level experts. This tendency to exaggerate is detrimental to the credibility of the system and dissuades potential users.	<ul style="list-style-type: none"> Ask managers to validate the description proposed by each employee of his or her own expertise. Ask people to specify as well what they can't do, if there is a risk of confusion for users.

Our selection

To find the best ideas on this subject, we recommend the following publications:

The Hidden Power of Social Networks

Rob Cross, Andrew Parker, Harvard Business School Press, 2004.



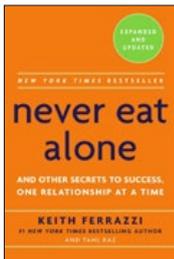
Devoted to the networks formed by employees in a company or department, this book attempts to understand how these networks function and how they could be improved to facilitate the effective flow of information. The analytical, disciplined, precise and straightforward manner in which the authors address the topic gets right to the heart of the issue with no superfluous meanderings.

In addition to offering high-quality thinking, this book can also serve alone as a how-to guide for managers who want to study the existing networks within an organization. Chapters 3 and 5 clearly explain how to do this, and are complemented by the very useful surveys and checklists in Appendix A.

We also recommend chapters 6 and 7, which contain many practical tips and illustrative examples on how to improve the way networks operate in an organization.

Never Eat Alone

Keith Ferrazzi, Currency-Doubleday, 2005.



Management literature is not always reputed to be particularly exciting, but this book is an exception. Admittedly, the topic is not in itself particularly original ("How to develop your networks?") and the advice that it proffers, although useful, is rarely revolutionary. However, the tone adopted by the author makes this book stand out. Obviously a highly gifted networker with a passion for human relations, he shares his daily experiences in a manner that adeptly convinces us that "we can do it too." The world he lives in and the social rules he follows are undeniably

US-centric. Yet, his enthusiasm and skill in establishing a sense of closeness with the reader makes it hard to remain indifferent.

Of the 32 short chapters in the book, chapters 1, 2, 6, 9, 15, 17 and 19 appear to be the most original, and should be consulted first for a quick read. In contrast, the last section (chapters 22 to 31), devoted to promoting a "personal brand," seems much more anecdotal.

Further readings

To explore this topic further:

- *Karen Stephenson's Quantum Theory of Trust*, Art Kleiner, *Strategy + Business*, Issue 29. (Article)
A detailed analysis of how networks function in organizations.
- *Use your influence effectively* (Manageris Synopsis 124a)
Develop your understanding of the mechanics of power and influence in the organization.
- *La logique de l'Informel* [The unofficial side of the organization], Gérard Pavy, Les Editions d'Organisation, 2002. (Book)
Develop your understanding of the unofficial side of organizations.
- *Leveraging Communities of Practice for Strategic Advantage*, Hubert Saint-Onge, Debra Wallace, Butterworth-Heinemann, 2003. (Book)
Organize networks to share ideas and generate knowledge in the organization.
- *Trust in the Balance*, Robert Bruce Shaw, Jossey-Bass, 1997. (Book)
The foundations of trust, a critical component in cooperative relationships.

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Energize your team

The challenge

Both motivation and low morale are contagious. Who has never tapped into the energy of a particularly dynamic colleague or, conversely, felt dragged down by a manager known for draining employee motivation? More than just a mundane observation, the importance of this phenomenon has been documented by researchers. Employees are shown to be more focused when interacting with “energizing” people and are more sustainably engaged in solving the problems they address. The ability to infuse energy into day-to-day contacts hence has a real impact on team performance.

Make every interaction an energizing moment

To maintain a high level of energy in a team, managers must be attentive to the quality of each interaction.

Think positive!

Optimism is contagious. Underlining the opportunities rather than the obstacles encourages people to adopt a constructive mindset.

- Try to identify the **opportunities** in each situation.
E.g.: A challenge people will be proud to tackle, a chance to discover other ways of doing things, to work with new people, etc.
- Show why the problem **deserves having time and energy spent** on it.
E.g.: Underline the benefits for the person or team.
- Be **proactive**. Instead of asking, “Will we succeed?”, get people to ask themselves, “How will we succeed? Upon what strengths will we rely to attain this objective?” In this way, you will help people feel stimulated by the prospects, rather than daunted by the scale of the task at hand.

Give people a voice

It is by getting involved in the discussion that people assume ownership of the topic and develop the desire to engage.

- In discussions, set aside times for **silence** and for encouraging people to speak up. Give people time to assimilate your messages. Then ask them to reformulate the content, as this will help them engage fully in discussion.
- **Listen to all viewpoints**. Even if all ideas are not retained, people appreciate having a chance to express themselves and understand why their suggestions may not be adapted in a particular case.
- **Have people participate** in defining the next stages. They will feel more concerned by the success of decisions if they take part in making them.

Recognize progress

Recognizing progress shows that efforts pay off, which keeps people motivated, especially during long projects.

- Regularly highlight **progress**.
E.g.: Scorecards with percentage completed, verbal encouragements, etc.
- Periodically put ongoing work in a **longer-term perspective** to help people avoid the demoralizing impression of spinning their wheels.
E.g.: Where were we when we started? What stages and challenges have we already surmounted?
- Don't forget to **celebrate** small victories. This enables a team to catch its breath in the course of the project.

Be fully present in discussions

Managers who are distracted by other concerns will have more trouble convincing others of their sincere interest for the subject.

- Organize yourself to avoid **distractions**, even legitimate ones.
E.g.: Shut down your computer screen, meet in a calm office, etc.
- Take a minute before starting a meeting to **focus** on the issues at hand and what you want your employee to take away.
E.g.: Review the objectives, check your emotional state, etc.
- Be attentive to your **body language**, as it says a lot about your real interest in the other person and the discussion.
E.g.: Smile, make eye contact, nod your head to show you are listening, etc.

Create transparency

People are more motivated to take responsibility when they feel fully informed of the situation.

- Avoid **unspoken comments**, as they can quickly sap your credibility and thus your efforts to convey your sense of urgency and your energy. This doesn't mean you have to be open about everything, but be frank about the constraints and divergent interests that may exist.
- Be careful to ensure the **consistency** of your words and actions. People are always more motivated when they know that statements will be followed up with actions.



Cope with **stressful situations** more effectively

The challenge

Stress is part of our day-to-day professional experience. Whether we're trying to finish a project on time or presenting the annual strategy to the executive committee, we naturally feel nervous. This pressure isn't a bad thing per se. It drives us to best mobilize all our capabilities. But it can also be accompanied by troublesome experiences, such as paralyzing thoughts, unpleasant physical reactions, etc. Fortunately, we can learn to limit their occurrence by developing a few simple reflexes.

Three reflexes to be more serene despite pressure

Everyone experiences stress differently. Understanding your own reactions will help you better manage the effects.

1 Identify your optimal stress level

The level of stress at which we perform the best varies appreciably from one person to the next. Some people need to feel a certain amount of pressure to be fully motivated and work to the best of their abilities. Others in the same circumstances, however, may have trouble concentrating and perform less well.

Ask yourself:

- In which circumstances are you most effective? E.g.: Do you prefer to wait for the day before a deadline to feel motivated and thus get things done? Or conversely, do you work better without time pressure? Do last-minute changes energize you or discourage you? What other factors play a role in the way you feel?

Organize yourself according to your optimal stress level:

- **Adapt your schedule.** E.g.: Organize work according to your resistance to last-minute stress.
- **Adjust the pressure you create for yourself.** E.g.: Manage the number of projects you undertake simultaneously; ask a peer to reassure you or, conversely, spur you on during important presentations, etc.
- **Know when to ask for help.** E.g.: Don't wait to be overloaded with stress before reorganizing your work or priorities.

2 Identify techniques to manage the physical repercussions of stress

Stress triggers physical reactions that vary widely from person to person, and can be very debilitating depending on the circumstances: tachycardia, altered pace of speech, trembling, sweating, "drawing a blank," aggressiveness, etc. If nothing is done to stem these reactions, the ensuing vicious circle makes the situation even more difficult.

Identify your spontaneous reactions in stressful situations:

- How do you show stress physically (trembling, sweating, talking faster, etc.)? Do you tend to become more irritable, agitated, etc., when under pressure? Which effects bother you the most?

Establish rituals to alleviate the effects of stress:

- **Identify techniques** that work for you. These techniques vary significantly depending on the individual, so don't hesitate to test several. E.g.: Deep breathing, muscular relaxation, stretching, taking a brisk five-minute walk before an important meeting, etc.
- **Be ready to activate these techniques as necessary.** E.g.: Don't hesitate to take a break during a difficult negotiation to go stretch or do some breathing exercises; have a bottle of water handy in case your mouth is dry, etc.

3 Work on the automatic thoughts that aggravate stress

Stress certainly has objective causes, but it is also highly correlated to our interpretation of a given situation. Thus, we often unwittingly have automatic thoughts such as: "He's criticizing me; he doesn't like me," or: "If this project fails, my career is ruined." Often erroneous, these automatic thoughts nevertheless help to increase our apprehension.

Become aware of these automatic judgments:

- What thoughts come to mind spontaneously? What frightens you—disappointing your entourage, making mistakes, etc.?

Put things into perspective:

- When you make an automatic judgment—such as "We'll never make it!"—, act as if you were hearing it for the first time from a third party. How objectively well-founded is this statement? Might it be an exaggeration? Are there any facts that contradict it? Aren't you unfairly generalizing or interpreting an objective observation about the situation as personal criticism?

Managing Mental Health

Goals of Managing Mental Health

The goal of managing mental health is not to solve other peoples' problems. While managers will use helping skills to support colleagues and staff, it is important to distinguish their role from that of qualified counsellors.

A manager's role is to:

- Talk about problems confidentially
- Find other resources that will assist the other person
- Attempt to help the other person resolve their problems as early as possible
- Avoid giving personal advice
- Separate their own personal issues from those of the other person
- Help others clarify their issues
- Help and encourage others to deal with strong feelings and crises in an effective/logical manner
- Identify and define and manage problems within a work context
- Help others to take responsibility for and actively solve their own problem situations
- Make appropriate referrals according to specific situations and personal needs



The Helping Framework

In the event that you notice an issue, the following tips and focus areas will help you to plan a mental health conversation.

Focus Area	Potential Actions
Seek Support	<p>Have you spoken to your manager about the issue and your concerns?</p> <p>What role will you play in this process? How and who will you team up with?</p> <p>What other resources are available to help plan your approach?</p>
Approach and Discuss	<p>Think about timing, location and the words you are going to use.</p> <p>What are you going to say if they deny the issues and reject your help?</p> <p>What are you going to say if they admit there is a problem?</p> <p>How will you balance the need for confidentiality with the transparency, collaboration, openness and risk management?</p>
Follow up	<p>Consider the reasonable timeframes and how you will objectively measure their progress towards the ultimate goal of recovery.</p> <p>Are there any issues that may need to be escalated such as industrial relations risk, safety risks or other problems associated with the person you have been speaking with?</p>
Debrief	<p>Have you arranged for someone to debrief with you?</p> <p>Should you be receiving external assistance to debrief this issue?</p>



Beyond Blue Action Plan

The following items will help you to develop a personal and/or organisational action plan to help effectively manage mental health.

For assistance in implementing these strategies, please call Acacia Connection for guidance and support.

Action Item 1: Make workplace mental health an organisational value and goal

Specific action I will take and date to be completed:

--

How I will know when I am successful:

--

Action Item 2: Speak about mental illness in the workplace, including any personal experience you may have, to reduce stigma

Specific action I will take and date to be completed:

--

How I will know when I am successful:

--



Action Item 3: Allocate necessary resources and set the measurement framework you want to use in your organisation

Specific action I will take and date to be completed:

How I will know when I am successful:

Action Item 4: Hold managers at all levels accountable to maintaining a mentally healthy workplace (and reward them for facilitating this)

Specific action I will take and date to be completed:

How I will know when I am successful:

Action Item 4: Develop your leadership and people management skills

Specific action I will take and date to be completed:

How I will know when I am successful:



Coping with Change Fact Sheet

Change is something that we constantly live with everyday. Change involves endings, transitions and new beginnings

Be it in our personal lives, professional lives, things are constantly changing. Sometimes we adapt to change with no effort but sometimes, some changes are just seemingly impossible to get used to. Like it or not, changes happen everywhere frequently, particularly in modern workplaces.

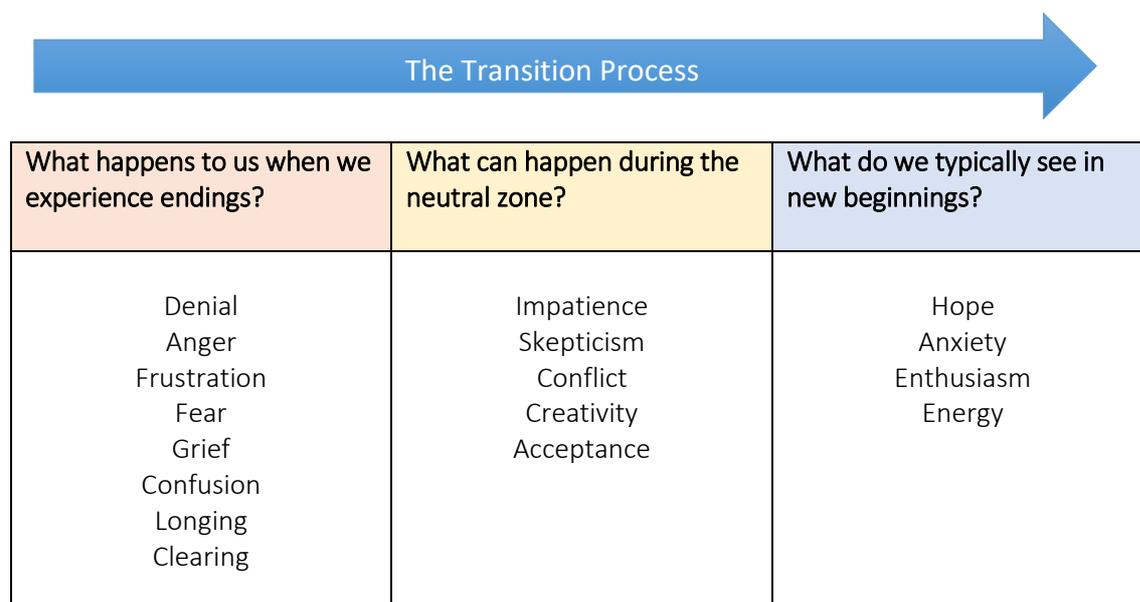
It is important that we understand how people respond to change generally and how can we work around it to make the change works for you.

Individuals have relatively predictable responses and concerns when facing change. Anticipation allows us to respond to concerns and manage negative impacts more effectively.

Experiencing change is very personal. There could be 10 people going through the same process and feel completely different about what's happening.

If we can anticipate & respond to concerns, we can manage negative impact more effectively

While people are different in exactly how they react to change, we can predict with some level of confidence that most people will have certain phases they will go through. Work by William Bridges sheds light on these phases as explained below:



Major workplace change that affects your job, your team or other elements of life can be challenging because you may think or feel that you will:

- Lose competence (e.g. while learning new skills)
- Not be as comfortable (e.g. in unfamiliar surroundings)
- Lose control (e.g. have little say in what is happening)
- Be less confident (may lose 'status' or recognition of your existing skills/ contribution)



A common reaction to these feelings includes:

- Over-generalising
- Taking things personally
- Pessimism
- Black & white thinking
- Imagining the worst

Change involves adjusting to many things at once like; new roles, teams, work space, location, systems and manager/s.

When a significant change happens what can you do that will best equip you to deal with the change?

As an employee, we usually accept the need for change but often have questions about the process. Individuals have relatively predictable concerns and questions when facing change.

Having said this, some people cope with change better than others. Research data and our personal experience shows that people who can withstand the stress of change utilise certain key skills. These are not personality traits but actual skills that employees can learn.

Stress-resistant workers tend to have higher levels of:

<p>Control</p> <p>They experience a sense of personal power and look for what they can control about their jobs.</p>	<p>Connection</p> <p>They value their friendships with people, feel respected, and have a common bond and purpose with the people around them.</p>
<p>Challenge</p> <p>They see change as an opportunity to learn new skills, not as something they must avoid and fear.</p>	<p>Commitment</p> <p>They are involved in their work and they create a sense of purpose and meaning in what they do.</p>

Employees commanding these skills are better able to reduce the negative effects of change on their work performance, personal functioning and health.

**If you feel you need more support coping with change, contact Acacia Connection for assistance:
1300 364 273**



What is Self-Care?

“Self-care” can be understood in many different ways. In its simplest form, the term refers to our ability as human beings to function effectively in the world while meeting the multiple challenges of daily life with a sense of energy, vitality, and confidence. Self-care is initiated and maintained by us as individuals, it requires our active engagement.

The term “self-care” spans a full range of issues:

- Physical
- Emotional
- Intellectual, and
- Spiritual.



Some conceptualise this construct by considering the dimensions of mind, body, and spirit, or in terms of thinking, feeling, and behaving.

It is referred to as “wellness”, a “healthy balance”, “resilience”, and simply, mental health. It is important to note, though, that no matter how one breaks down the dimensions of self-care, in the end, all of these different aspects are interconnected. Failure to take care of oneself in one realm can lead to consequences in another.

What isn't Self Care?

To better understand what self-care is, here are three things it is not:

1. Self-care is not an “emergency response plan” to be activated when stress becomes overwhelming. Instead, healthy self-care is an intentional way of living by which our values, attitudes, and actions are integrated into our day-to-day routines. The need for “emergency care” should be an exception to usual practice.
2. Self-care is not about acting selfishly.

There is no magic formula for self-care. Each “self-care plan” will be unique and change over time. Ultimately, we must listen well to our own bodies, hearts, and minds, as well as to the voices and messages from trusted friends, as we seek resilience and renewal in our lives and work.



Instead, healthy self-care is about being a worthy steward of the self – body, mind, and spirit – with which we’ve been entrusted. It is foolhardy to think we can be providers of care to others without being the recipients of proper nurture and sustenance ourselves.

3. Self-care is not about doing more, or adding more tasks to an already overflowing “to do” list. Instead, healthy self-care is as much about “letting go” as it is about taking action. It has to do with taking time to be a human being as well as a human doing. It is about letting go of frenzied schedules, meaningless activities, unhealthy behaviours, and detrimental attitudes such as worry, guilt, and being judgemental.



Other Personal Self-Care Tips and Ideas

Physical	Emotional	Mental	Spiritual
Exercise: Walk, gym, cycle, swim etc.	Deep breath and positive thoughts	Say an affirmation	Connect with nature
Soak in a hot bath with candles and music	Share feelings about an experience with a friend or colleague	Read a book or magazine	Concentrate on the flame of a candle
Stretch and move to music	Listen to music you love, sing and make noise	Express your thoughts and feelings in a journal	Meditate/pray
Get a massage	Attend a counselling session(s)	Make a to do list and organise by urgency and importance	Study with a spiritual teacher



Take a course in Tai Chi, yoga or water aerobics	Hug someone, or ask for a hug	Write a poem or draw/paint a picture	Do something of service for someone else or your community
Sit in the sun for 15 minutes	Pet your dog or cat	Visit a museum or art gallery	Listen to a guided meditation track
Sit in a garden or a park or go for a bushwalk	Telephone a long distance friend	Undertake a hobby or study	Practice a daily quiet time routine
Watch birds or animals interact in nature	Reflection: Journaling, writing, poetry	List your traits, and your needs and wants	Visualise yourself in a peaceful place
Change one thing to improve your diet	Notice what you are feeling several times a day	Make a list of short term and long term SMART goals	Learn about a religion or belief system other than your own
Incorporate humour and laughter into something you are doing	Write a letter to someone who has hurt you (but do not send it)	Preview your day on awakening, review on returning	Study ancient esoteric wisdom teachings
Take a nap	Affirm yourself daily and acknowledge your accomplishments	Work on your family tree	Practice unconditional love and forgiveness with self and others

Self-Care Philosophies

Wellbeing is about feeling good and functioning well. Prioritising these key actions into everyday life and increasing time spent in these activities will help to enhance wellbeing.



Connect

Connect with the people around you, with family, friends, and neighbours; at home, school, or in your local community. Think of these as the cornerstones of your life and invest time in developing them. Building these connections will support and enrich you every day.

Be active

Go for a walk or run. Step outside. Cycle. Play a game. Garden. Dance. Exercising makes you feel good. Most importantly, discover a physical activity you enjoy, one that suits your level of mobility and fitness.



Take notice

Be curious. Notice the changing seasons. Catch sight of the beautiful. Remark on the unusual. Savour the moment, whether you're on a train, eating lunch or talking with friends. Be aware of the world around you and what you are feeling. Reflecting on your experiences will help you appreciate what matters to you.

Keep learning

Try something new. Rediscover an old interest. Sign up for that course. Take on a different responsibility at work or school. Learn to play an instrument or how to cook your favourite food. Set a challenge you will enjoy achieving. Learning new things will make you more confident, as well as being fun to do.



course.
Learn
you



Give

Do something nice for a friend, or a stranger. Thank someone. Smile. Join a community group. Look out, as well as in. Seeing yourself and your happiness linked to the wider community can be incredibly rewarding and will create connections with the people around you.

What Went Well Exercise

We can often think too much about what goes wrong and not enough about what goes right in our lives. Of course, sometimes it makes sense to analyse bad events so that we can learn from them and avoid them in the future. However, people tend to spend more time thinking about what is bad in life than is helpful. Worse, this focus on negative events sets us up for anxiety and depression. One way to keep this from happening is to get better at thinking about and savouring what went well.





For sound evolutionary reasons, most of us are not nearly as good at dwelling on good events as we are at analysing bad events. Those of our ancestors who spent a lot of time basking in the sunshine of good events, when they should have been preparing for disaster, did not survive the Ice Age. So to overcome our brains' natural catastrophic bent, we need to work on and practice this skill of thinking about what went well.

Steps to Follow:

1. Every night for the next week, set aside ten minutes before you go to sleep.
2. Write down three things that went well today and why they went well. You may use a journal or your computer to write about the events, but it is important that you have a physical record of what you wrote. The three things need not be earthshaking in importance ("My husband picked up my favourite ice cream for dessert on the way home from work today"), but they can be important ("My sister just gave birth to a healthy baby boy").
3. Next to each positive event, answer the question "Why did this happen?" For example, if you wrote that your husband picked up ice cream, write "because my husband is really thoughtful sometimes" or "because I remembered to call him from work and remind him to stop by the grocery store." Or if you wrote, "My sister just gave birth to a healthy baby boy," you might pick as the cause ... "She did everything right during her pregnancy."

Writing about why the positive events in your life happened may seem awkward at first, but please stick with it for one week. It will get easier.

For those of us able to quiet our inner culturally-conditioned cynic who judges and dismisses such practices, Martin Seligman promises that we'll be "less depressed, happier, and addicted to this exercise six months from now."

The 4Rs Model of Reflective Thinking



Level	Stage	Questions to get you started
1	Reporting and Responding	Report what happened or what the issue or incident involved. Why is it relevant? Respond to the incident or issue by making observations, expressing your opinion, or asking questions.
2	Relating	Relate or make a connection between the incident or issue and your own skills, professional experience, or discipline knowledge. Have I seen this before? Were the conditions the same or different? Do I have the skills and knowledge to deal with this? Explain.
3	Reasoning	Highlight in detail significant factors underlying the incident or issue. Explain and show why they are important to an understanding of the incident or issue. Refer to relevant theory and literature to support your reasoning. Consider different perspectives. How would a knowledgeable person perceive/handle this? What are the ethics involved?
4	Reconstructing	Reframe or reconstruct future practice or professional understanding. How would I deal with this next time? What might work and why? Are there different options? What might happen if...? Are my ideas supported by theory? Can I make changes to benefit others?



Mindfulness

It's a busy world. You fold the laundry while keeping one eye on the kids and another on the television. You plan your whole day while listening to the radio and commuting to work, you then

Mindfulness is not so much about doing as it is about being
Jon Kabat-Zinn

plan your weekend while you are at it. But in the rush to accomplish necessary tasks, you may find yourself losing your connection with the present moment, missing out on what you are doing and how you are feeling. Did you notice whether you felt

well rested this morning or that the jasmine is in flower when you left home in the morning?

What is Mindfulness?

Mindfulness is the practice of purposely focusing your attention on the present moment and accepting it without judgement.

Why should we practice mindfulness?

Increasing your capacity for mindfulness supports many attitudes that contribute to a satisfied life.

By focusing on the here and now, many people find that they are:

- Less likely to get caught up in worries about the future or regrets about the past,
- They are less preoccupied about success and self-esteem and
- Are better able to form deep connections with others.

Mindfulness is also positively correlated with benefits such as:

- Decreased stress
- Improvements in physical problems such as heart disease and blood pressure
- Improved sleep habits
- Alleviation of gastrointestinal problems



Developing and Practicing Mindfulness

<p>Mindfulness Techniques</p> <p>There is more than one way to practice mindfulness but the goal of any technique is to achieve a state of alert, focused relaxation by deliberately paying attention to thoughts and sensations without judgement. This allows the mind to refocus on the present moment. All mindfulness techniques are forms of meditation.</p>	
<p>Basic Mindfulness Meditation</p>	<p>Sit quietly and focus on your natural breathing or on a word or mantra that you repeat silently. Allow thoughts to come and go without judgement and return your focus on your breathing or mantra.</p>
<p>Body Sensations</p>	<p>Notice subtle body sensations such as an itch or tingling without judgement and let them pass. Notice each part of your body in succession from head to toe.</p>
<p>Sights and Sounds</p>	<p>Notice sights, sounds, smells, tastes, and touches. Name them 'sight', 'sound' etc. without judgement and let them go.</p>
<p>Emotions</p>	<p>Allow emotions to be present without judging them. Practice a steady and relaxed naming of emotions: 'joy, anger, frustration' etc.</p>
<p>Urge Surfing</p>	<p>When you feel a craving or an urge (e.g. to eat excess food, use an addictive substance or practice an unwanted behaviour), acknowledge the urge and understand that it will pass. Notice how your body feels as the craving enters. Replace the wish for the craving to go away with the certain knowledge that it will subside.</p>



Meditation Exercise:

1. Sit on a straight-backed chair or cross-legged on the floor
2. Focus on an aspect of your breathing such as the sensations of air flowing into your nostrils and out of your mouth, or your belly rising and falling as you inhale and exhale.
3. Once you have narrowed your concentration in this way, begin to widen your focus. Become aware of sounds, sensations and ideas.
4. Embrace and consider each thought or sensation without judging it good or bad. If your mind starts to race, return your focus to your breathing. Then expand your awareness again.



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for assistance: 1300 364 273**



Work/Life Balance

In organizations and on the home front, the challenge of work/life balance is rising to the top of many employers' and employees' consciousness. Work/Life Balance: Challenges and Solutions

In a society filled with conflicting responsibilities and commitments, work/life balance has become a predominant issue in the workplace.

Defining Work/Life Balance

Work/Life Balance is defined as a state of equilibrium in which the demands of both a person's job and personal life are equal.

Life is a balancing act, and it is safe to say that almost everyone is seeking work/life balance. But what exactly is work/life balance? Work/life balance fundamentally concerns establishing an effective balance between working commitments and personal commitments while finding a personal equilibrium between both of these key aspects of your life.

This is all very well in theory, but how often have you ever found yourself with a schedule like the one opposite. After the last 24 hectic hours, before you know it your alarm is going off and you have to start all over again. You have the work sorted, but where is the life or even the slightest hint of balance?

Personal Lives and Family Values to the Forefront

In recent years personal and family lives have become critical values that people are less willing to put on hold, put aside, or ignore, for the sake of work. Over time, the workforce has begun to change course from being willing to spend every hour working to learning to manage the complexities of modern living.

Consequently, people are looking for options that allow for both a personal and family life, and many seek ways to have it all.

A Pivotal Study

In their highly acclaimed book, *Work and Family-Allies or Enemies*, Friedman and Greenhaus (2000), two leaders in work/life balance, bring forth new evidence to help us understand choices we make as employers and individuals regarding work and family.

To handle work/life balance, Friedman and Greenhaus emphasize that working adults learn to build networks of support at home, at work, and in the community. Conflict between work and family has real consequences and significantly affects quality of family life and career attainment of both men and women.

The consequences for women may include serious constraints on career choices, limited opportunity for career advancement and success in their work role, and the need to choose between two apparent opposites—an active and satisfying career or marriage and children.

Many men have to trade off personal and career values while they search for ways to make dual-career families work, often requiring them to embrace family roles that are far different, and more egalitarian, than those they learned as children.



This research reveals a compensatory effect between two forms of psychological interference: work-to-family and family-to-work.

The impact of partner support is greater when business professionals feel their employers are unsupportive of their lives beyond work. Conversely, for employees with relatively unsupportive partners, the employer family-friendliness reduces role conflicts more than partners. Thus, one source of support compensates for the lack of the other.

Stress and the Consequences for Employer and Employee

We live in stressful times, and each of us deals with stress every day. In the past three years, an increasing number of employees surveyed indicate they are struggling with work/life balance.

Scientists agree that in moderate amounts stress can be benign, even beneficial, and most people are equipped to deal with it. However, increasing levels of stress can rapidly lead to low employee morale, poor productivity, and decreasing job satisfaction.

Work/life programs represent a largely untapped workplace solution that have the potential to significantly address stressful work environments.

Is Your Organization Culture-Ready for Work/Life Initiatives?

Before establishing work/life initiatives, it is important to know if the organization's culture is open and ready to support work/life programs.

One of the challenges of work/life initiatives-from both the employer and the employee viewpoint-is equitability, which has been cited as a major concern regarding work/life initiatives. When organizations are establishing work/life programs, it is important to consider the purpose of the programs and whom they serve. For example, do the work/life programs serve all employees or are they aimed toward employees who are parents or who are dealing with their elderly parents?

Another aspect of judging organizational readiness for work/life programs is the employees' view of perceived support of the organization.

Communication is Key

Communication about work/life programs is essential. Although an organization may offer a rich menu of work/life benefits, the desired effect-yielding positive business results-is unlikely to occur if employees do not know about the programs or understand them.

Human resource professionals should consider four critical questions:

1. Does the company culture truly support work/life benefits?
2. Does the management philosophy, starting with senior management, sincerely endorse work/life benefits?
3. Do managers and supervisors understand the impact work/life balance has on their workforce and
4. Are employees aware of and do they understand the company's work/life programs?

The following are suggestions to promote work/life programs:



- Review the human resources strategy to see if it supports the company's mission.
- Through questionnaires or focus groups, find out what employees feel about work/life balance.
- Align work/life initiatives with HR strategy (e.g., employer of choice).
- Create a work/life award program using noncash incentives aligned with business objectives.

Can Work/Life Initiatives be Measured?

Work/life initiatives create positive employer branding, promote being an employer of choice, foster organizational citizenship, and support diversity initiatives. Building a strategic business case for work/life initiatives requires hard data documenting positive results on the balance sheet.

The best place to start is to consider five key areas:

1. Employee time saved
2. Employee retention
3. Increased motivation and productivity;
4. Absenteeism; and
5. Decreased stress-related illnesses.

Work/Life Balance Trends

The challenge of work/life balance in our society is unlikely to disappear. Identified and discussed as follows are four work/life balance trends. Awareness of these trends will place the human resource professional in a position to better educate management and work closely with employees.

Employees are often preoccupied with work when not working, and when in the company of family and loved ones, experience an inability to be meaningfully engaged in non-work spheres. Modern work has become knowledge based, fluid, and intellectual; overworked people think about work all of the time. For many people, work has become cognitively intrusive."

To understand work/life balance, in simple terms, this means that work/life balance is not just about finding "physical time" to do all that needs to be done. Instead, and more importantly, it is about the "cognitive space" necessary to process, organize, and respond to the thinking demands of life within a complex society.

The cognitive intrusion of work results in:

- Lower job satisfaction
- Less happiness
- A greater incidence of work/life conflict and
- More frequent burnout.

Eldercare

One of the most significant trends in work/life balance is the increasing focus on eldercare. Researchers point out that work/life professionals anticipate eldercare will become a major issue in the coming years.



Many people caring for elders also have childcare responsibilities. These trends have led to the baby boomer generation being known as the "sandwich generation."

A growing number of companies offer work/life programs addressing eldercare. Eldercare programs include eldercare referral service, emergency eldercare, subsidy of eldercare cost, and paid eldercare.

Employee Assistance Programs can play an important role in an organization's eldercare program. Some of the lesser-known benefits of an EAP are referrals to community programs and contacts regarding eldercare issues.

Human resource professionals could significantly increase EAP usage by learning more about EAP eldercare support and communicating this to employees. Through these actions, HR professionals can emphasize the importance of EAPs to management and at the same time leverage EAP benefits to employees.

Total Life Planning

Total life planning is a new and innovative approach to work/life benefits and helps employees examine important aspects of their professional and personal lives and understand how they relate.

Their goal is "to encourage employees to look at their lives as a whole and assess relationships, emotional and physical well-being, careers, spirituality, and their personal financial situation. From these programs, employees can assess their available choices to improve balance in their lives and develop an individualized life plan ... the most successful programs set a goal-oriented environment with a meaningful and transformational component for each individual."

The concept of total life planning represents a paradigm shift in our society. One of the major benefits is renewed employee energy, enthusiasm for work, and increased productivity. Total life planning programs may be offered in conjunction with benefits such as health, life, and disability insurance, or on a stand-alone basis. However, not all organizations may wish to consider total life planning, as it brings topics into the workplace that have traditionally been considered private.

Conclusion

Work/life programs have the potential to significantly improve employee morale, reduce absenteeism, and retain organizational knowledge, particularly during difficult economic times. In today's global marketplace, as companies aim to reduce costs, it falls to the human resource professional to understand the critical issues of work/life balance and champion work/life programs.

Be it employees whose family members and/or friends are called to serve their country, single mothers who are trying to raise their children and make a living, Generation X and Y employees who value their personal time, couples struggling to manage dual-career marriages, or companies losing critical knowledge when employees leave for other opportunities, work/life programs offer a win-win situation for employers and employees.

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