



what it takes to achieve effective engagement

Working out how to turn the big, strategic goals into action is a job for everyone. We know that by now. In a world described as 'VUCA' –volatile, uncertain, complex and ambiguous – it's a clear imperative, for firms and armies, the civil service and the NGO, that we must engage the entire organisation in developing ideas for 'how', in deciding, planning, committing to and then tracking those initiatives that translate the intended strategy into intended results.

So there is a lot of activity. Workshops, brainstorm, online jams and offsite workouts, project teams and town hall forums. Spending time on these activities is now part of the daily job for most. And there is a lot of excitement. And a lot of frustration.

In this Debrief, we have collected the practices and principles that appear to make engagement processes more successful. The findings are based on witnessing at first hand the successes and failures of over seventy different programmes of engagement undertaken by fifty organisations of all sizes and styles. We have tracked their progress and assessed their effectiveness. From a multinational marketing services group to a Danish software house to an English healthcare unit.

This work has enabled us to identify, and for the last few years apply, a set of five essential principles and a host of practical pointers. These principles layer one on the other to arrive at a model for making those activities intended to get everyone working on strategy execution most productive.



We propose that you consider how well you and your organisation embrace these principles and how you could improve the practice in your place. Maybe do it with colleagues, in the name of collaboration.

We offer some tales from the front line and a gentle call to action. And we start at the heart.

Belief

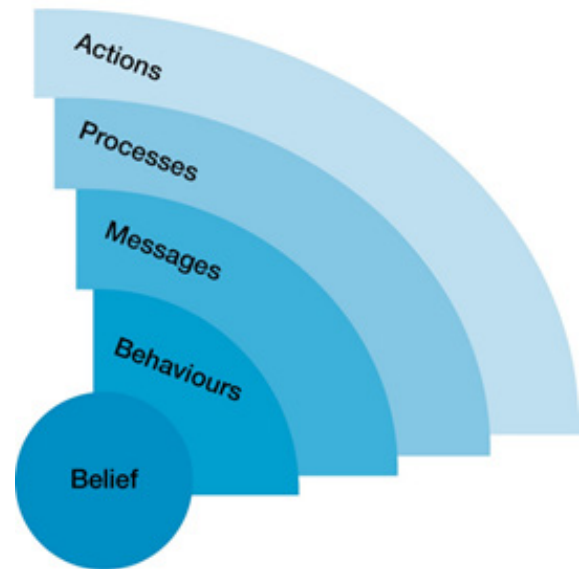
You have to actually believe that collaboration gets better results. Many of the engagement activities we have observed took the character of a charade as the true intentions of the management became clear. After a month-long process of online consultation and dialogue with their staff and clients, the leadership team of a professional services firm met to develop the three year plan for shareholders. After two days, with not a single reference made to the output of the much-heralded listening exercise, the obvious question was asked of the CEO and his response conveyed the value the top team really placed on the collaborative power of its people: "I can't see how a couple of thousand submissions online can help us get out of this mess"!

You have to believe that more names in the room help. Certainly, more eyes bring a better chance of reporting the true customer experience; more brains can invent a new way; more voices can name the unchallenged assumption. We believe that in a complex and uncertain world, the answers can lie anywhere and leaders must begin the process of engaging their people with their own firm belief that it will be the combined knowledge and ingenuity of all of their people that will navigate the business to the best outcome. Don't run a process to engage your people in thinking about the 'how?' if it's just a box-ticking; you will soon be found out.

So, check your genuine intent.

Behaviours

The route to productive collaboration lies in a balance of Inquiry and Advocacy, in asking and asserting. An exchange of pet-peeves and preconceived solutions, in which the participants wait for the others to stop speaking rather than genuinely listen, is of little benefit to the creation of new knowledge. We have witnessed reputed 'stars' and industry veterans assembled in an undoubted 'A team' to develop the plan to execute change in a construction services group disband with no new or useful solutions simply because they were unable to build on others' inputs. And we have seen colleagues from across a healthcare firm politely invite each other to speak until the frustration with no progress threatened blood pressure levels. The fact is that we need everyone to listen AND we need everyone



to advocate their position. Progress is made when people speak out for what they think and know, and then shut up and listen to the feedback. And then consider it and build on it, and then speak up again. We need the advocate and we need the curious questioner, and we need them in the same person. Productive collaboration requires us to be curious about the inputs of others and confident to share our own, even though they may prove to be flawed.

This takes an environment in which it's acceptable to be seen to be wrong and it needs people with a willingness to fail. With all the power dynamics present in organisations, advocating is not an invitation easily accepted so alongside advocating and listening we need encouraging and supporting others. Enabling others to speak up is a shared responsibility, not just down to the speaker. When we do see reward for participation or for showing support, it is often trivial and usually delayed pending the contribution turning out to be a big hit. Instead, leaders should focus on – and recognise and reward - the behaviours.

So, when collaborating, take a risk, and ask. And listen. And, then, take another risk and advocate. And listen again.

Messages

For there to be an effective engagement of your people in working on how the big goals get turned into action, we need the people to turn up. We need to get attention to the cause. It is vital that the top team or the HR team have an ability to generate in colleagues an excitement and curiosity about the new, common mission and how they can contribute. An accounting firm used team talks, a CEO 'Ted-style' event, endless breakfast

meetings, posters in lifts, intranet blitzes, and interviews in the public press to call on the imagination and ambition of 4,500 colleagues to get involved. A retailer plasters the walls of its head office. A travel company used tweets to staff located across the globe. Appeal to the emotional as well as the rational: the 2020 turnover target may have less impact than heartfelt statements of the personal purpose of the CEO or clippings of the market share gains of much hated rivals.

Manage expectations about what is in play as well as what is at stake. Too many efforts to harness firm-wide inputs have been devalued by broad and unrealistic calls to action. The leader of a Belgian bank shrugged when presented with ideas for expansion that were way above even his pay grade, never mind those of the presenters. The shrug was felt for years. We must focus the collaboration on topics where the knowledge and ideas and energies of our people make the difference. If we don't, the motivating effect of getting involved in grand schemes will soon be overshadowed by the demoralising effect of fruitless work.

So, appeal to the heart as well as the mind to get people motivated to contribute. And make it clear where you need them to play.

Processes

The genuine intent of the leaders, the balanced behaviours of skilled collaboration, the excitement and appetite for participation...all need a practical outlet. Firms that successfully deploy their people in translating their strategy to action pay as much attention to the design of their collaboration processes as they do to the design of their production processes.

These 'social mechanisms' include any way in which we

bring people together to work on how we change: special workshops, regular meetings dedicated to developing or steering plans, ideas councils, management conferences, online platforms for discussion, programme teams, taskforce interventions, executive training programmes.

Designing the way that we engage our people is a creative exercise, a surprising science and a matter of practicalities. GE's 'Workout' has found fame for its highly specified format, the psychology in the theatre of its format, and for the thousands of events that have been run to generate inputs and decisions to drive change in that global group. The Lean 'rapid improvement event' is equally highly specified, with established worksheets and meeting formats all oriented to a clear goal and a working solution by the end of the week.

Experienced exponents orchestrate the flow of messages and anticipate the types of response so that the right inputs will be stimulated, useful tools can be provided, and inputs can be progressed.

The way the engagement process fits with the governance of the organisation is a key concern; we need to plan for how decisions will be made with the outputs and ideas. We have witnessed several smooth-running programmes grind to a halt because of slow senior management decision-making. To address this, a US retailer set up 'Simply Do It' to generate proposals for changes in store and provide a fast track to authorisation from key decisionmakers.

Processes need to account for what really helps and hinders people to speak up. A process which asks for named ideas in a public forum for example might work in an organisation with an open culture but won't work at all in one which is hierarchical and blame - oriented. So experts always consider what process might work in their particular organisational culture.





The design of the right process for your organisation is a project, not just an idea. The team recently charged with establishing a new, nationwide campaign of workshops and online ideas exchanges consisted of an HR business partner, a senior line manager, a social media technologist, a PA, and an external consultant with experience of designing such activities.

So, work on the detailed design of the processes that facilitate the collaboration. Manage the practicalities.

Actions

Lastly, but essentially, follow through. Organisations that succeed, leaders that succeed in engaging their people in working on the 'how', always build a reputation for the contributions of their people resulting in action. Soon after kicking off their 'make it happen' campaign to engage their people in executing their new strategy, a social housing group publicly pointed to the projects that had bubbled up and begun to bite. Collaboration needs to become the habit and positive feedback to contributors that 'your inputs matter' will feed the appetite for regular activity. Of course, the appetite will be affected by experiences elsewhere and with previous leaders so it's important to pay attention to the record for action that you inherit.

So, build a reputation for following through. Make sure things happen as a result.

Translating strategy belongs to everyone

The strategy is simply the method for achieving success. It's not just the high-level intention for where we compete or what numbers we hit; it's the big idea and it's the coherent plan for a set of actions that get us there. Which means that the people that know the business and the environment best, those that see the opportunities and threats day-to-day, those are the ones that need to work out how we translate the big idea into action.

From the established 'social mechanisms' of groups such as GE to the new democratisation of holocracy dawning in organisations like Zappos, the imperative of getting everyone engaged in working out how to translate the strategy into action is unavoidable. Check where you and your organisation stand on the five principles and consider how you can improve your practices.

Written by Hamish Scott.
Hamish holds fractional executive positions in industry and faculty positions in a number of European business schools.

