



Stronger cultures perform better.

This is instinctively true, and there are McKinsey studies that back it up with solid data. So how do you get to that improved performance? There are two basic paths: **proactive**, and **reactive**. Both work. You just have to find what works for you right now.

PROACTIVE:

Be intentional about creating a culture that drives better performance.

Assessment and Action Plan

Identify the specific areas of culture and process that will move the performance needle:

- Half-Day Management Team Assessment (p. 2)
- Staff Survey and Management Team Action Planning Retreat (p. 2)

REACTIVE:

Solve the specific problems that are slowing down performance and weakening your culture.

Strategic Management

Fix the core management processes that hold you back the most:

- Performance Reviews (p. 3)
- Strategic Planning (p. 4)

Internal Collaboration

Once and for all, deal with the problems that get in the way of internal collaboration:

- Silos (p. 5)
- Conflict (p. 6)
- Trust and Transparency (p. 7)

ASSOCIATIONS: And for the association community, I have some specific projects based on my years of experience leading and consulting to associations. (pp. 8-9)

CULTURE ASSESSMENT AND ACTION PLAN

Problem: You have realized for some time now that your culture is holding you back, but it seems too complex or unclear to actually do anything about it. Of course, if you don't do anything about it, it's not going to change, is it? But who has the time or resources for a three-year culture transformation project?!

Solution: Bring me in to help you assess and change your culture, one process at a time. You will need to do an assessment, but it won't take long to identify the most important areas that require change, and I'll help you design specific, doable, short-term projects that will move the needle.

What will it be like to do this work?

There are two versions of the assessment.

The short version involves a document review of existing structures and processes (including any previous assessments or consultant reports), a one-hour interview with the CEO, plus a three-hour meeting with the management team. In the three-hour meeting I'll present the assessment framework and gather data from the management team in the room. I'll write up a brief report with recommendations following the meeting.

The longer version starts with the document review and the one-hour interview with the CEO, but then adds an online culture assessment survey to be completed by employees and the management team. The survey results will be analyzed and I'll present a report with initial recommendations to the management team during a one-day retreat. That will provide the jumping off point for a more focused discussion that generates a small number of specific projects that will address the issues raised in the assessment.

What kind of results can I expect from this?

You will cross over the gap that separates knowing there is a problem from doing something about it. One of the biggest obstacles to being proactive about building a stronger culture is momentum, and by creating focused and visible improvement projects you'll be moving in the right direction.

PERFORMANCE REVIEWS

Problem: Performance reviews are universally frustrating, and often fail to generate desired behavior anyway. Performance reviews are confusing (documentation for firing? personal growth? meeting departmental goals?) and often forced into only one meeting per year. It's hard on both managers and employees, and it rarely connects back effectively to culture and strategy. Performance management should be about behavior and results—getting more of the behavior you need to ensure technical excellence and support both strategic and cultural goals.

Solution: Bring me in to redesign your performance review process to be more effective. We'll clarify what you're measuring in the process to ensure it ties back to the culture, skills, and personal development that drive your organization's success. Then we'll redesign the process itself so it is more continuous and includes feedback from peers and direct reports, rather than the traditional one-way review. And we'll make sure you can use technology to make the whole thing easy (because cumbersome review processes never get done).

What will it be like to do this work?

The new system will ensure that every employee is **valued** (culture), **skilled** (job expectations), **growing** (development), and **successful** (measurable). This starts with defining what's valuable—and not the feel-good, poster-worthy values like honesty, integrity, and freedom. We mean the actual behaviors that are valued in your workplace because they drive organizational success. We'll survey the staff for input, but the first round of clarity needs to come from the management team. Then we'll work with a small design team to come up with a comprehensive new process that integrates the best of what you already have into a series of annual, periodic, and ad hoc interactions that happen both in person and via technology. The process needs to address the top-down aspect (valued and skilled) as well as the bottom-up part (growing and successful). The design team will take the first crack at the process, including forms and documentation, and then I'll provide comprehensive feedback and recommendations for improvement. You'll end up with a working process along with a set of possible improvements to be implemented as you move forward.

What kind of results can I expect from this?

If you know why your culture is powerful, and you can steer more behavior in support of that power, you will see up-ticks in pretty much any of your performance metrics. At the individual level, employees will engage the process (not fear it), and it will tie directly into their own development, generating levels of employee engagement that you've never seen.

STRATEGIC PLANNING

Problem: Your (expensive) strategic plans end up being predictable, ineffective, or unused.

Strategy and planning are both important, but traditional processes result in predictable plans that get forced from the top down, based on the company's calendar, not the market's, and there is ample research that proves that doesn't work. It feels overwhelming to start from scratch, so every year we go back to the same, stale planning process—with predictably poor results.

Solution: Bring me in to make your strategy processes more collaborative, flexible, and integrated with implementation.

I'll convene and facilitate meetings across departments, help you conduct some research, and analyze implementation processes to connect them with strategy formation. It's not about producing a plan (though you can have one if you like)—it's about building capacity for effective strategic decision-making and action throughout the enterprise.

What will it be like to do this work?

The essence of collaborative strategy boils down to four activities: **understand, choose, do, and learn**. In this six-month project, we'll analyze and adjust specific processes within some or all of those four areas, in order to improve your strategic decision-making and implementation. I'm not forcing you through some proprietary 18-month strategy process. I'm working on the nuts and bolts of your operations, processes, and decision making to build strategic capacity, and the six-month time limit keeps us focused on achieving results.

I start with an assessment of your current processes related to the four strategy areas, using a combination of interviews, open-ended surveys, and facilitated conversations. Out of that I will build a roadmap that prioritizes potential process-improvement projects that would have the biggest impact on strategic capacity—like how data is shared, the structure and process of team/staff meetings, how customer preferences are determined, the budgeting process, etc. I'll pick a small number of them and run teams through a 90-day process for improving how that particular piece gets done (including capturing the learning). I finish in the last month with a new assessment that can serve as the starting point for another cycle.

What kind of results can I expect from this?

With initial process improvement, you'll see more agile implementation, better decisions, and staff that have more "ownership" of their jobs. You'll also be improving the staff's ability to collaborate across levels and departments. As your strategy process begins to fully embrace a new approach, broader organizational success metrics will improve.

SILOS

Problem: Departmental silos are inhibiting internal communication and collaboration. Silos are great in helping us leverage deep expertise, but they can cause problems when departments compete with each other, obscure information, and prevent effective collaboration. Instead of “busting” them, you need to actually build capacity for collaboration, and change relevant processes to make sure it happens.

Solution: Train your people to collaborate and manage conflict, and redesign key processes to cut across boundaries. Bring me in to conduct some training sessions in conflict and collaboration skills, and then we’ll work with managers to redesign processes, including information sharing, employee orientation, and staff meetings, to enable better collaboration. We’ll also look for ways to use social technology to mirror the cooperation we want to see throughout the organization.

What will it be like to do this work?

Staff will look to their leaders first before they start to work things out themselves, so we’ll facilitate a meeting of the management team to get clear on how the silo conflict is impacting the organization and articulate a shared commitment to what needs to be done to turn things around.

Step two is to engage the silos with a training session in conflict resolution skills, in order to give people some shared language and common skills around conflict to work through the issues. I’ll interview staff prior to the training to incorporate examples from the workplace.

Finally, I’ll work with managers and staff at different levels of the organization to actually redesign work processes to address the problems. Examples include redesigning staff meetings or how information is shared, starting some cross-functional teams, or changing your new employee orientation process. My work includes facilitating meetings, providing coaching in person or via phone, or writing drafts of new policies or processes.

What kind of results can I expect from this?

When you’re finished with this project, you’ll see more getting done—with less drama. Information flow will increase, and problems will be solved more quickly (by the people closest to the problem). In addition, the conflict skills will be applicable within teams and departments, not just across them.

CONFLICT

Problem: Conflict within or among teams slows work down and never seems to go away.

Specific teams and even entire departments and organizations can effectively grind to a halt when they get stuck on conflict. Without the skills to resolve the conflict, most teams just limp along, sometimes for years, and performance suffers. The challenge is to find the root causes of the conflict and do the hard work required to resolve them fully.

Solution: Bring me in to intervene on the conflict directly. I'll work with the team/group in a series of facilitated meetings to define and resolve the conflict once and for all, which includes developing action plans to ensure the team doesn't slip back into the conflict unintentionally. I'll also leave behind some conflict resolution tools you can use moving forward as new conflicts crop up (and they always do). Resolution of the conflict and the increased capacity will enable staff to re-focus their attention and effort on more pressing strategic issues.

What will it be like to do this work?

After clarifying objectives with the leader of the team, I schedule individual interviews with everyone who will be a part of the facilitated session. We need everyone's perspective to structure the agenda for the facilitated session, which usually boils down to three to five themes at the heart of what needs to be resolved. During the one-day retreat, we work through those issues fully. Conflict requires careful and delicate facilitation, but we will always push for the necessary clarity. We work hard to make it safe for people to speak the full truth, because that's often a missing ingredient.

One-third of the facilitated session will focus on application: what is going to be done differently when you get back to the office. And I always provide some conflict resolution tools that can be used on an ongoing basis. I also schedule follow up meetings three and six months in the future to review progress and make adjustments.

What kind of results can I expect from this?

When we're done, you and your people will be on the "other side" of the conflict, with a shared understanding of the issues and agreements about who's going to do what moving forward. Teams typically see increased performance following processes like this: being able to deal with new issues more quickly, improved morale, increased trust, better communication skills, and improved quality of group decisions.

TRUST

Problem: Lack of trust means information is not shared effectively. Trust increases speed and effectiveness, but traditional organizational processes make trust more difficult, particularly across departments. The result is a poor flow of information both horizontally and vertically, which then inhibits effective collaboration. Turning this around requires embracing transparency in a strategic way.

Solution: Change processes to embrace strategic transparency. Trust is not something you can force or “implement”—but you can grow it by intentionally being more transparent. Find specific areas where you can change the way you do things that enable greater transparency, more truth being spoken, and more effective collaboration, and you’ll start increasing trust in your organization. Bring me in to help you identify the areas where new transparency will contribute to trust, and then change some processes to actually make it happen.

What will it be like to do this work?

I start with an assessment that measures the presence of specific factors that we know contribute to high-trust environments. Then I debrief the assessment with the management team and other relevant staff in order to map out the next steps that will address transparency, truth, and collaboration. For example, changing processes around information sharing and cross-functional teams, or changing expectations during processes like team meetings or performance reviews.

The work here is about changing processes and behavior, with follow-up group discussions to ensure that everyone involved can see and understand what has changed related to trust and identify how speed and effectiveness have increased.

What kind of results can I expect from this?

The biggest impact is an increase in both speed and morale. Lack of trust creates work-arounds and redundancy as people demand to “get it done themselves.” And distrust creates an undercurrent of dissatisfaction and complaining. Successfully increasing trust reverses those dynamics.

- Problems are solved more quickly and proactively
- The amount of “water cooler” complaining will decrease
- Information flow will increase
- Meetings will actually take less time.

ASSOCIATION MANAGEMENT: BOARDS

Strategy Facilitation

Problem: Our Board is stuck at a particular point in the strategy process, and the conversations either stall or go in circles. Regardless of the specifics of your strategic planning process, sometimes the Board just gets stuck. It might be high-level word-smithing, or maybe it is failure to make any meaningful programmatic choices, but unfortunately, relying on the Board Chair or Exec to facilitate your way out of it isn't working. It is just hard to affect this dynamic from the inside.

Solution: Bring me in to facilitate a single Board meeting in which they will regain focus and momentum. I can facilitate a meeting (up to one full day) that will break the pattern and get the Board back on track. Using your association's existing strategy documents plus some telephone interviews with Board and staff, I will facilitate a conversation where the Board itself will answer the key strategic questions. You won't end up with a 39-page strategic plan (which should be a relief, quite frankly), but you'll have enough new clarity about key aspects of your operating environment, your portfolio of projects, or the strategic principles that will guide decision making and action planning to propel you forward.

Board Leadership

Problem: We need to ensure our Board is among the best in the business. It is no longer acceptable to put up with a Board that gets too much in the weeds, focuses too much on their own one-term agendas, or relies too heavily on the "we've always done it that way" excuse. Even the best Boards can slip into those patterns over time if they're not careful. If this is happening to your Board (or you're worried about it happening), then you'll want to push them to elevate their game.

Solution: Bring us in to facilitate a one-day leadership development session. This isn't generic leadership training or association governance 101. It's customized leadership development based on ten years of my research and experience in leadership and associations. Using real data from interviews and document analysis, I'll design a program that helps the Board clarify its role in driving the association's success (in relation to the rest of the system) and then identify specific behaviors that will have the greatest impact. The program challenges Board members to put ego, tradition, and even some "best" practices aside, and focus on actually doing things that generate better performance.

ASSOCIATION MANAGEMENT: STAFF

Staff Retreats and Teambuilding

Problem: Our whole staff (or a specific team) is stuck in some frustrating patterns that are affecting morale and performance. It happens to most teams at one point or another. You've got good, smart people, but the results just aren't where they need to be. This means there are other dynamics at play, and you need a trained eye to help you identify them and solve them so the team can get back to being productive again.

Solution: Bring me in to facilitate a retreat that actually leads to new behaviors that solve problems. My staff retreats and teambuilding sessions don't use games or "trust falls." The best way to build a team, it turns out, is to actually solve real workplace problems together. I'll interview staff ahead of time and design a one-day retreat that will present the most important issues (as identified by you) and then work them through, down to commitments and action plans. Where possible, I'll include some skill building to ensure you don't slip back into the old patterns.

Culture Assessment

Problem: We need to ensure our association will thrive in the 21st century. For years we let our culture evolve organically, and that's just not cutting it in today's fast-paced and increasingly digital world. We're still getting the job done, but it's harder and harder to stay ahead of our challenges and lead our members, rather than just react to them. How do we create an association that is agile, innovative, and relevant to both current and future generations of members?

Solution: Start building a culture that works in today's world. I have developed an organizational assessment, customized for associations, that will help you identify specific areas where your culture is effective (and not effective) in today's environment. Your staff will complete the assessment, which is based on work from my book *Humanize* (co-authored with association social media consultant, Maddie Grant), and the resulting report will help you prioritize an action plan for bringing your association "up to code" in today's social world. Maddie and I will facilitate a debrief session with the Management Team as part of the project.



Jamie Notter has been speaking, training, and consulting for corporations and nonprofits for twenty years.

Jamie started his career in the field of international conflict resolution, where he spent six years designing and delivering training programs in areas of ethnic conflict (if you get a chance, ask him about the awesome people on the island of Cyprus). Jamie then moved into working with organizations, initially as a diversity trainer and consultant, and later leading his private management consulting practice, working extensively with trade associations and professional societies. In 2008 Jamie joined Management Solutions Plus, Inc., where he led the Consulting Division, and in 2013 he went back out on his own.

An accomplished speaker, Jamie travels extensively delivering keynote addresses, seminars and workshops to corporate, nonprofit, association, and government audiences covering leadership, conflict, generational diversity, and how to become a more social business.

Jamie carries a master's degree in conflict resolution from George Mason University, and a certificate in organization development from Georgetown, where he serves as adjunct faculty. An avid writer, he has authored dozens of published articles and three books:

Humanize: How People-Centric Organizations Succeed in a Social World (2011, hardcover, Que Publishing, with Maddie Grant, www.humanizebook.com)

Generational Diversity in the Workplace: Hype Won't Get You Results (2007, ebook, Notter Consulting, www.getmejamienotter.com/generations)

We Have Always Done It That Way: 101 Things About Associations We Must Change (2006, paperback, Lulu Press, with Jeff De Cagna, David Gammel, Mickie Rops, and Amy Smith, www.lulu.com/spotlight/fivethinkers)

Partial Client List:

Goodwill Industries, Blue Cross Blue Shield of Florida, Entomological Society of America, American Nurses Credentialing Center, National Association of Homebuilders, Fitness Australia, American Massage Therapy Association, Young Entrepreneurs' Organization, U.S. Fish and Wildlife Service, U.S. Environmental Protection Agency, Council of Engineering and Scientific Society Executives, American Institute of CPAs, Council for Responsible Nutrition, International Food Information Council, USA Rice Federation.