



## Notes Template for Facilitators – Fall 2020 Business Round Tables

### Topic: Effective Leadership in Trying Times

Facilitator: Rick Hecke!

Number of participants: 8

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Empathy is critically important, put yourself in your employee's shoes
2	Balance your leadership style to individuals
3	Honesty and openness are key to building trust
4	Practice active listening
5	Be flexible
6	Act, don't overanalyze
7	Don't shrink the information going out to spare feelings, this builds trust and avoids rumors
8	Increase communication, make sure your communication is being received as intended, follow up
9	Create an environment where people feel "we are all in it together"

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Show empathy, honesty and openness to build trust
2	Increase communication and make sure to follow up, particularly if you can't meet face to face and read body language
3	Be decisive

Topic: Effective Leadership in Trying Times

Facilitator: Cameron Beul

Number of participants: 8

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Transitioning the message to people – making sure that people felt comfortable – identified core values – how we would run the company – stopped focusing on profitability.
2	Be authentic with staff. We all have made many mistakes. Keep learning, keep trying. Acoff book - Finish.
3	Three phases to handling a crisis - emergency phase, adaptive phase, reset. Focus on what is going on right now. Transparency. Share challenges with clients and staff.
4	Trying to get team aspect is important – the vibe. Learn from mistakes – empathy with team. Be cognizant of that at all times
5	Keep focus on culture. Make sure that people are our most important resource. How can we help each other.

6	Provide organizational leadership. Embrace where you are and also change. Be adaptable. Lead change in the direction that we want it to go. Train leaders to embrace teamwork. Embrace and support being a leader. Embracing and pushing change. Managers are not necessarily leaders.
7	Different levels of communication. First more corporate. Then more at the office level. Trying to find balance. Portion of staff is very engaged. Others have become disengaged. Benefits – prior to pandemic struggled to use video-conferencing. Define cameras on or cameras off in invite.
8	Let folks know that you are not ignoring them if you miss an e-mail. Bombarding staff with too much communication is almost the same as not communicating.
9	Great time to check in with clients – we’re all in this together

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Effective and clear communication. Balance between communications from corporate and locally. Consistent communication. Be transparent and authentic when communicating with staff. Use video – identify in the invite whether the call will be cameras on or cameras off.
2	Identify core values and keep a focus on the company culture. Make sure that people are the most important resource and all employees are treated like they are valued.
3	Provide strong leadership that embraces and drives change. Use this time as an opportunity to drive change in the direction that the company wants to go. Your leaders need to embrace and support being leaders. Managers are not necessarily leaders. These are trying times and we need to provide our leaders with training that they need especially in dealing with a remote work force.

Topic: Effective leadership in trying times

Facilitator: Art Hoffmann

Number of participants: 8

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Alignment of the leadership team, through all levels who share the same information and deliver a consistent message will build trust, helping your staff stay focused and not be distracted by conflicting messages
2	The practices we implement to navigate troubling times will be there when we reach the other side and if we are smart, we'll adopt and continue those practices and be a better company for it.
3	Take advantage of opportunities to lead even when the challenges aren't affecting you or your firm. Recognize when your clients are facing challenges and could benefit from your expertise and leadership.
4	Keep communications focused, informative and reliable. Acknowledge that challenges are at hand, that the organization has overcome challenges in the past and will do so again. Provide information and be transparent. Explain the future state as you see it and explain what you believe it will take to achieve it. Don't guess or make promises that you aren't positive that you'll be able to keep. Trust is hard earned but easily lost.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Leadership during crisis requires an abundance of communication. In the absence of information, the void will be filled with rumor and anxiety. Don't forget that while you as the leader have the best situational awareness of anyone, the only things your staff knows for certain is what you tell them.
2	Be empathetic. Try to place yourself in your people's situation and try to see the crisis from their perspective. Address the things that are most important to them first and give them the information about the items that will most significantly affect them and their co workers.
3	Be confident and decisive and inspire confidence that, as with past challenges, they, the organization and their clients will make it through the latest challenge.

Topic: Leadership in Trying times

Facilitator: Kurt Fraese

Number of participants: 8

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	<b>While both have been “trying times,” the pandemic experience is quite different than the “Great Recession” of 2008-09.</b> The industry took a big hit in the prior recession relative to layoffs and office closings. The pandemic hasn’t yet impacted our business strength to date but has created much more uncertainty and health security angst. The common strategy employed for both is to stay out front, play offense, not get bogged down and prioritize continued engagement of both employees, clients and communities. More like a yo you this time. Great recession was worst experience, lots of layoffs, most trying time.
2	<b>Do not try and micromanage.</b> This is a time to utilize the full team, delegate and challenge the team to find greater capacity.
3	<b>Must always find ways to make closer personal connections with staff.</b> This is particularly true of new staff. Do not wait until the crisis to try and connect. Existing strong relationships offer tremendous resources in difficult times.
4	<b>Transparency and honesty is key in communications.</b> Help the firm resist the “they” and “us” mentality Adaptability is also critical. Accessibility is critical. Direct and firm. Don’t separate from the grass roots. Be transparent
5	<b>Don’t ask folks to be positive, but instead ask them to practice neutral thinking.</b> The idea is simply set the expectation that people should not be negative. Respond and don’t react... it’s OK to say you’re going to think about it. Leave time for alignment of the head, heart and gut.
6	<b>Stick with your strategies even in hard times.</b> Strategic plans should contemplate uncertainty and help build resiliency, even on the individual staff level. Everyone wants answers from their leaders. Strategic goals can still inspire and drive the firm forward even in trying times.
7	<b>Accessibility is an even more important leadership competency in trying times.</b> Staff want to be able to connect to leaders, instantaneously when needed.
8	<b>Authenticity is critical.</b> Be yourself as a leader. It is OK to show your human side and show some vulnerability. Don’t be afraid to say you don’t know and will need to think about an answer. It is important that you be genuine and relatable. Model good behavior. Roll up the sleeves and be willing to do some grass roots work. All of this will help establish a great team dynamic: “we’re all in this together”
9	<b>Drive adaptation and change.</b> Take care of performance issues (preferably in advance). Sometimes trying times force changes that should have been made long ago.
10	<b>Be flexible.</b>

Topic: Leadership in Trying Times

Facilitator: **Guy Marcozzi**

Number of participants: 7

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Plant seeds for crisis management by build a good will bank in good time with frequent non-crisis interactions to draw from when needed. Interaction when its not needed is important so communication experiences aren't always cathartic.
2	Listening to understand the issues, express understanding and empathy
3	Willingness to make tough decisions and be responsible for them
4	Concise and consistent messaging
5	Don't tolerate complacency
6	Look to solutions in the future instead of holding on to a past that won't likely happen again
7	Empowering staff through delegating, encouragement and support
8	Communicate the plan forward and the why. Explain. Repeat multiple times in multiple formats with multiple voices so to maximize it being understood and remembered.
9	Set a schedule of interaction and find a communication rhythm.
10	Use technology (e.g.Go to Meeting) and recordings to increase accessibility to communication

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Building the good will bank prior to crisis to draw from
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2	Communication is important but leadership is also about establishing your credentials (empathy, vision, competency, a plan) and willingness to accept consequences.
3	Regular, transparent, consistent communication and messaging is essential

Topic: Effective Leadership in Trying Times

Facilitator: Ben Crawford

Number of participants: 8

Briefly summarize up to ten things from the discussion that were of most interest. This might include points discussed, concerns expressed, lessons learned, advice given, solutions offered, case histories presented, or anything else related to the topic. Expand the boxes as needed.

1	Talked about experience leading during the pandemic first. Doug talked about how they made some strong decisions at the beginning that helped them be efficient. Talked about calls with staff throughout the process to stay connected. <b>Touch points were very helpful.</b> Some admitted that they have tapered back on the touch points and gotten back to business as usual. Being honest with the staff about what was going on.
2	<b>Transparency</b> about the cash in the bank and stability for the staff. Felt like that helped relieve the staff's concerns. Issues with traveling for work and the need to quarantine when they got back to the main office.
3	Started discussing safety and the individual programs at the firms. Larger firms (Sanborn and Terracon) or firms that work on larger projects got a safety update out quickly with some good information. My smaller firm was able to get this together quickly as well.
4	<u>Core competencies and strategies.</u> <b>Being a better listener</b> , having to learn how to do that. Maybe not worry about solving all the problems of the staff. Being calm and accepting that it isn't going to be like we want it. Maybe why try to fight it. Ability to make decisions quickly. Working on <b>delegating</b> and teaching delegating, saw some growth out of staff.

Summarize the three most important items from the discussion that should be shared with GBA members:

1	Being honest with the staff but lead and be positive. Telling the staff that we aren't broke can help them relax.
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2	Listen to the staff and not try and solve all their problems.
3	Use the situation to help staff grow anyway you can. Letting them make some decisions.