ROUND TABLE *Wrap-Up*

FALL CONFERENCE 2023

As part of the GBA Fall Conference, a live broadcast event held in October 2023, the GBA Business Practices Committee hosted several round table sessions to discuss important current issues facing the geoprofessions. Each round table was moderated by a member of the committee, who took notes and summarized the key points of discussion and the most important items to share with GBA members. What follows are the notes from each round table discussion. Use these notes for discussions with your team, to prompt a review of policies, or as a kickoff to a strategy brainstorming session.



CRUCIAL CONVERSATIONS

Abstract

Uncomfortable conversations are sometimes integral to addressing project concerns, project performance, risk, and other issues that can affect your client, teaming partners, or staff relationships and your business. Crucial conversations done properly can be one of the most effective ways of building trust with your team, clients, and business partners. This round table discussion addressed the following questions:

- What are some ways to start a difficult/crucial conversation?
- What makes a conversation crucial?
- What can a firm do to encourage managers to have these conversations?

Most Important Items To Share With GBA Members

1. Not every crucial conversation is difficult, but every difficult conversation is crucial.
2. Crucial conversations, when performed properly, can be one of the most effective ways of building trust with your team, clients, and business partners.
3. Every interaction is an opportunity to increase or decrease trust.
4. Issues related to HR concerns, safety, performance, project problems, financial risk, client concerns, or time sensitivity are just a few that require crucial conversations.
5. Establish a comfortable setting to have an authentic conversation. If possible, the conversation setting should be face to face. It's best to avoid a desk between the individuals having the conversation. Sometimes it's necessary to have a third party in the room.
6. Address the issue directly. Be frank. Be kind.
7. Don't wait. Thoroughly address the issue as soon as possible. The longer you wait, the harder it is to have the conversation and the more likely there are to be repercussions.
8. Building good relationships makes tough conversations easier. Teaming with effective communicators that value knowledge and opinion sharing (good, bad, or indifferent information) produces better results. Working with unsophisticated people can lead to poor communication, more frequent problems, and create a need for more crucial conversations.

9. When encouraging others to have crucial conversations, coach them to:
    a. Prepare. Prior to the crucial conversation, consider what the best or worst results would be by having (or not having) the conversation. This should make it clear to them that a conversation is necessary. Offer to help them in their preparations or invite them to observe you having a crucial conversation as an example.
    b. Keep the end in mind, focus on results, be empathetic, do not get distracted, slow down, and be present.
    c. Be proactive. Have regular check-ins with employees to communicate issues in real time.
    d. Learn how to communicate with different personality types. This will make future conversations easier.
10. Set expectations early on and follow through if consequences are required. A bad employee/client/partner relationship is always noticed by others and can be a morale killer if not addressed.

Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

Key Points

- Crucial conversations done properly can be one of the most effective ways of building trust with your team, clients, and business partners.
- Not every crucial conversation is difficult, but every difficult conversation is crucial.
- Crucial conversations tie directly to relationships. A trusting relationship is the cushion that allows you to have a crucial discussion with a team member.
- Always address issues head on. Dive in. Introduce the issue as a difficult conversation.
- The longer you let something go, the harder it is to have the conversation. Address the issue sooner rather than later.

Advice

- If possible, conversations should be face to face.
- Establish a comfortable setting and have an authentic conversation.
- Avoid a desk between the individuals having the conversation.
- Consider having a third party in the room for the conversation (this is often important for HR-related topics).
- With staff, consider starting a difficult conversation with their strengths and reiterate that they are important to the team.
- Crucial conversations can be focused on negative and positive discussion points. Conversations don't just have to be about poor performance issues.
- Address the issue directly. Do not dance around the topic. You are not doing anyone a favor by not being direct. Set clear expectations so you can hold someone accountable.
- Always provide a follow-up summary of a crucial conversation in writing. Try to make the takeaways collaborative to get buy-in.
- Be prepared to offer a plan or solutions. Do not just pile on problems. Set or clarify expectations.
- For newer managers, help them learn how to have a crucial conversation by sharing the experience of having a crucial conversation (in a client or project meeting).

Solutions

- Set up regular meetings and do check-ins to be proactive and not reactive. This can help prevent, limit, or mitigate problems.
- Constructive criticism can be seen as negative feedback. If we have more "check-ins" with employees, this can make these types of conversations less painful or unnecessary. The negative conversation can be turned into a positive conversation due to the regularity of the check-ins.
- Communication methods are important. Try to set expectations for when, how, and the frequency. Learn other's preferences and find a middle ground.
- Personality tests can be used to help define the ways that people speak and listen. These can be great tools to help with these types of conversations.
- Managerial training should include crucial conversation training.
- In a tough job market, employers and managers may be afraid to have crucial conversations because they are afraid of losing employees. They do not want to broach uncomfortable subjects, no matter how impactful the behavior is because they are afraid of losing employees.
- For companies with employee ownership including an employee stock ownership plan, having someone not pulling their weight or causing issues is not a benefit for the company since they are seen as "owners."
- Be properly prepared for the conversation – take time to think of scenarios and fallout from crucial conversations.
- Use the "HIP" model for addressing potential issues:
  - What Happened?
  - What's the Impact?
  - What's the Plan moving forward?
- Understand the "temperature" in the room. Do not mild-mannerly under deliver your message and have your point taken too lightly, or over-deliver in a tempered manner causing the other party to "check-out" from the conversation.
- Keep the conversation professional and try not to be emotional. Stick to the facts and find some common ground. Set boundaries and timelines.
- Give feedback immediately. Most people appreciate knowing if they did something wrong right away. For some, regular feedback is a way of showing that you care about them enough to regularly acknowledge how they are doing.
- If you do not know when you should start this conversation, ask HR for guidance. If left too long, there can be negative impacts.
- The actual words used are a small part of communicating; where tone, expression, and body language add so much more context to, or speak louder than, the words.
- Do not have sandwich conversations; good/bad/good/bad.
- Clients may be the hardest to address or the most avoided, especially if you do not know them very well.

Case Histories/Related Information

- There are many reasons for crucial conversations – including unsafe field conditions – that a client may ask you to put yourself into, or pressure by clients to create passing results. Crucial conversations revolve around why these scenarios are not acceptable.
- One member shared the following lesson learned: "I worked on a project where my team made a mistake, we discovered the mistake, brought the mistake to the attention of the client representative, discussed remedial options, proposed our contribution to the damages in terms of dollars and service credits, negotiated cost-sharing damages with team members, and oversaw the remedial work. The trust gained with the team and client created a lifelong client and firm advocates. Not only were the professional relationships enhanced but friendships were made."

ARTIFICIAL INTELLIGENCE

Abstract

What is AI (artificial intelligence)? AI is a branch of computer science that is designed to understand and store human intelligence, mimic human capabilities, eliminate tedious tasks, and aid in accessing and understanding extremely large data sets.

We all use various forms of AI in our daily lives, whether it's relying upon a GPS to locate a project site, online shopping algorithms to quickly find items, or asking Google to look up a particular topic. Goldman Sachs has predicted that the AI market will grow to $200 billion globally by 2025. Because of the proliferation of AI and the explosion of ChatGPT, firms are asking how to leverage the valuable aspects of machine learning while also warding against bad actors who may take advantage of these new capabilities. What does AI mean to you?

Most Important Items To Share With GBA Members

1. There is always a need for review of documents even if AI was used in the preparation of material.
2. AI is here to stay, but there is still unease and reluctance to dive into AI.
3. Members feel excited and fearful simultaneously.
4. AI generative reporting is anticipated in this industry. Students are already doing this to write essays/reports. Have AI write reports and our tasks will be reviewing the AI-generated content.
5. Risk of shared data & pressure to share data.

Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

- Limited firm adoption; most participants are still in "wait and see" mode. One organization started using AI during contract review and automated finding 80-90% of the most common mistakes.
- "Trust but validate" was a recurring theme. While AI may be able to assist with the creation of information, a human still needs to be a part of the review.
- Most individuals felt that AI is the way of the future and it is more of a risk to not adopt, but certainly there was still some trepidation as to where to start.
- Questions arose over who owns the data that is being used for AI. Is it the company's data or the client's data? How reliable is publicly sourced data? When is it appropriate to share data outside of the company? More questions than answers.
- Thoughts around disclaimers that may need to be added to documentation where AI was used during the preparation, similar to having a P.E. review and stamp. Will there be a need to disclose that the report was prepared using AI?

- One example was cited where a structural report was created 100% by AI. That report was then reviewed by a structural engineer who found several errors in logic or misrepresentation of building codes.
- People are already using ChatGPT to write reports in college and experimenting with it in AEC; have AI write report and us review.
- Microsoft & Google AI flip is switched this year.
- For geoprofessionals, DIGGS model of public data is already in place.
- There is pressure on consultants to share data. There is risk involved in using other people's data.

360 ASSESSMENTS

Abstract

Employee assessments/360 reviews are critically important to understanding employee's strengths and areas for growth to maximize performance and productivity. But what about their personal job satisfaction, relationships with peers and managers, or even an employee's effect on other employees' performance or overall team dynamics? How can GBA member firms get the most impact from employee assessments to build and retain high-performing teams?

Most Important Items To Share With GBA Members

1. Having a review process is important, but having engaged managers with proper training to implement the process is equally important.
2. If done well, reviews are a powerful feedback and retention tool. If treated like a burden or box-checking exercise, they can be damaging to retention. Reviews should be viewed as an "opportunity."
3. If not structured and measured, it's easy to lose momentum or consistency with completing the reviews.
4. Limit the number of reviews each person conducts.
5. Having a human resources professional in charge of the process can be helpful.
6. Employee assessments are a valuable tool in helping to guide career pathing and employee goals. They can help dictate important employee areas of focus including training and other relevant work-related experiences.
7. The process of assessments should be clearly defined and simple. Schedules, deadlines, follow-up, and types of documentation required should all be considered in the process and expectations should be well defined.
8. Equity is important in performing assessments. Everyone should get the same treatment at the same frequency. Field staff and those in remote offices should not be treated differently just because it might be harder to schedule time with them.

Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

- If done poorly, there may be damages that the employee experiences that may impact retention. Manager training is critical to effective feedback.
- Equity and fairness in reviews is critical. Must make sure everyone is involved.
- Communication training tends to be more focused on leadership and employees are not involved. Consider including the entire team in personality assessments so teams interact and understand each other better.

- Field team members and busy schedules interfere with reviews. Consider a deliberate approach to allow managers to meet in the field (where team members are located) so the review can happen and not be a burden.
- Team meetings can be a powerful tool for feedback beyond just reviews of individuals. Consider "Year in Review" team meetings to look for areas to improve as a team.
- Client involvement in feedback to employees could be a valuable tool to get positive client comments to employees to feel connected to their work.
- Reviews can be intimidating to the reviewee. It does not matter what medium you use for performance meetings (in-person or remote) but most agree that in-person is best if possible and going to a neutral site (out to lunch, etc.) can help facilitate conversations and relationship building.
- There should be no surprises in annual reviews; any important topic should have already been discussed.
- Numerical scales in reviews can be difficult to use fairly and consistently.
- Employee assessments are a valuable tool in helping to guide career pathing and employee goals. They can help dictate important employee areas of focus including training and other relevant work-related experiences.
- The frequency of assessments varied across companies with one per year at a minimum being the least and one per month throughout the year being the most.
- Spreading out reviews throughout the year reduces the burden. Schedule them on the employee's anniversary date.
- 30-, 60-, and 90-day new hire check-ins can provide valuable information and allow for both employer and new employees to pause and match expectations.

PROMOTING PEOPLE BEFORE THEY ARE READY

Abstract

Managers are often pressured into promoting people before they are ready either because an employee has been pushing for it, or due to a shortage of staff or otherwise qualified people. This can lead to disengagement among other staff and potentially put the promoted individual in a place where they could fail.

Most Important Items To Share With GBA Members

1. Your direct supervisor has a profound impact on employee experience. Proper training for supervisors is critical to morale.
2. Consider impacts on clients and the costs of replacing an employee when evaluating compensation for an individual. How hard are they to replace?
3. Supporting career progression and having a clear plan for employees is important for retention (people want to know where they are headed). This should be done early in their employment.
4. Make connections with employees. Build trust and let them know that they count. Be aware of them as people – not just employees – and allow them the latitude and trust that they may occasionally require. Create a positive and safe work environment.
5. Set culture. Focus on what makes your company great and stand apart from others. Be transparent when discussing values and mission statements. Be sincere and genuine in communication.
6. Mentor and set expectations early on. Have frequent check-ins so there are no unanswered questions. Encourage employees to grow within your company and within their field. Establish career paths and stick to them. Create "lifers" as Sydne Jacques mentioned in her presentation. If we can get staff to understand and see a path to success for themselves, and envision themselves growing with a company, they will be more likely to stay and less likely to look for employment elsewhere.

7. Another method to potentially reduce turnover was discussed: "Don't go shopping when you are hungry." Essentially, the group agreed that more emphasis on vetting potential employees' goals, commitments, skills, and communication abilities during the interview and hiring process could reduce turnover. Be more selective when you are hiring.
8. Increased certifications and skill development will resonate with employees, and tie that to wage increase.

Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

- Hiring someone into a level they are not ready for can also be an issue, or into a role that does not match their competencies (e.g., someone with strong technical skills being hired into a leadership role and not having those skills). It is important to understand their strengths during the interview process so they can be assessed as though they are an existing employee looking for a promotion.
- Some employees might want the title more than the additional responsibility or work that comes with the new title. Having detailed conversations about what the job expectations will be is very important.
- Sometimes people can be on the wrong "path" (e.g., management versus technical). Be careful when moving them laterally (e.g., from management to technical because it might come across as a promotion and disengage other staff that may have been impacted by the individual's poor management skills).
- Sometimes people get promoted and rise to leadership levels because of how much business they bring in, but they are not culturally aligned (e.g., treat staff very poorly, low integrity, etc.). This is very damaging for morale and sends a message to staff that the company does not care that much about their stated values. Leaders should consider the long-term impacts of keeping people like that at the company.
- Staff can become disengaged if they have not been promoted fast enough (in their opinion), but sometimes they really do just need more time and experience to get to that next level. One way to help is to have them learn new skills to help them diversify and keep them engaged while they continue to get the needed experience.
- A good way to avoid having to promote people before they are ready is to have well-documented job descriptions so that as the employer, you can refer the employee to that description.
- If there is not a way to avoid promoting people quickly, training for the new role should happen before they are promoted, not after.
- It's better to promote internally than to hire from outside when there is any question about whether or not someone is ready for the next step.
- If a promotion is not available, use ownership in your company to reward the employee.
- Be careful not to eliminate field training time for entry-level staff.



SUSTAINABILITY

Abstract

- Is sustainability a requirement of client RFP/RFQs that your firm responds to?
- What do you anticipate will be included in RFP/RFQs in the near future?
- What can your firm do to prepare for these requests?
- LEED was a big thing in the past; what is everyone seeing now?
- Are the project specifications requiring specific sustainable materials?
- Are team members' sustainability credentials of value to your clients?

Most Important Items To Share With GBA Members

1. Research your clients and know if they have ESG requirements or guidelines. If they do, specifically put language in your proposal that aligns with their requirements/values.
2. ESG questions are more common. We should be working to have company ESG documentation ready.
3. Include a proposal line item that allows your client to pay you for additional sustainability work. This allows them to make decisions.
4. Sustainability is increasingly a market driver. Create policies and understand solutions so that your firm can win this work.
5. Challenge your clients to embrace sustainability by offering innovative solutions.

Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

- Some firms are listing sustainability options in their proposals – specifically calling out sustainable alternatives, so the client can choose.
- Federal agencies (Corp) call out specific requirements. DOTs are getting better.
- It is important to know if your client has a policy for sustainability. That way you can call out those options specifically in line with their policy, versus looking like an added item.
- Some are seeing scoring systems for infrastructure projects. Points for sustainability.
- One company recently had to complete a 24-page ESG questionnaire with slavery and hostage questions. This was specifically in oil and gas. Essentially in the EU connected companies are at the leading edge of asking questions.
- One option is to include in the proposal the option to evaluate the solutions presented through the lens of sustainability. This follows the broad requirements of incorporating sustainability. Even if they don't ask for it in scope, they often have policies for sustainability requirements. Usually, broad requirements from government agencies, not private.
- Various levels of scoring for infrastructure. Tracking and preparing for the scoring system to prepare for client requests. LEED and ENVISION – Need to have ESG policy.
- Huge market driver. Be proactive so that you can capture new business.
- Developing a sustainability policy and ESG policy to comply with oil and gas requirements.
- Can't just say you are going to do something but must also show metrics to prove compliance. Think about solutions qualitatively.

TURNOVER AND RETENTION

Abstract

Employees are relocating, changing careers, demanding flexible work schedules, and resigning. With an industry average turnover rate of over 15%, this is one of our industry's biggest challenges. Finding staff represents the largest hurdle to growth in our industry.

- How can we improve retention?
- What are the impacts of high turnover rates on your company?
- What is your firm doing to help keep geoprofessionals engaged in the profession?

Most Important Items To Share With GBA Members

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Key Points, Concerns, Advice, Solutions, Lessons, Case Histories, or Anything Else Related To The Topic

- Ultimately for employees everything boils down to financial compensation and work experience. The influence a direct supervisor has on employee experience is very large (good or bad).
- Field technologists are harder to retain than professional staff. One theory was that they spend so much time out of the office that they are not as influenced by corporate culture. Compensation then becomes the key driver.
- Supporting career progression and having a clear path for employees is important to retention.
- When considering employee compensation, try to take into account how much it would cost to replace this person if they were to leave.
- Ideas that firms are using to retain staff include retention bonuses, paid-paid vacations, employee recognition (shout-outs, spot rewards), employee events, unlimited PTO, work from home.
- Engagement was the most common way that employers improve retention.
- Over the past few years, companies were so desperate to hire employees, experience and depth were often overlooked. Training is crucial for the long-term growth of these individuals. If we don't make the effort a priority, they will not see the company as a place that has their best interest and professional growth in mind.
- Continuing education can be a draw, but employees are so busy with work/life they may not feel that they have the bandwidth to go back to school.
- The younger generation does not see the value of benefits, profit sharing, ESOP, etc. We need to help them to understand the long-term value of these items. Frequent conversations to help build awareness help.

- It is important to establish the culture of the company from the beginning. Help the employees to feel like they are part of something "bigger" and not just a number. Help them to feel valued and appreciated.
- Mentoring and frequent check-ins help build rapport and build trust. These conversations can be a hybrid of work/life to help enforce that they are valued.
- One round table group stated that their group represented firms ranging from 20, 150, 280, and 3,000 employees. All of them struggle with employee retention and turnover.
- Turnover and retention problems have increased significantly in the last 10 to 15 years.
- There wasn't one specific issue that seemed to be causing turnover, but the turnover seemed focused around the lowest paid employees, and specifically construction material testing staff.
- The consensus was that employees weren't staying around long enough to see growth and realize learning, skills development, and client relationships that lead to longevity.
- The turnover of staff puts growth at risk due to a lack of adequately trained staff and more senior staff resources being used to find and train staff in lieu of focusing on servicing clients and finding new opportunities.
- One way to increase employee engagement is to implement "6 for 60" (attempt to have 6 conversations in the first 60 days with the new employees). This will help prevent the feeling of being left alone on an island out on project sites.

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