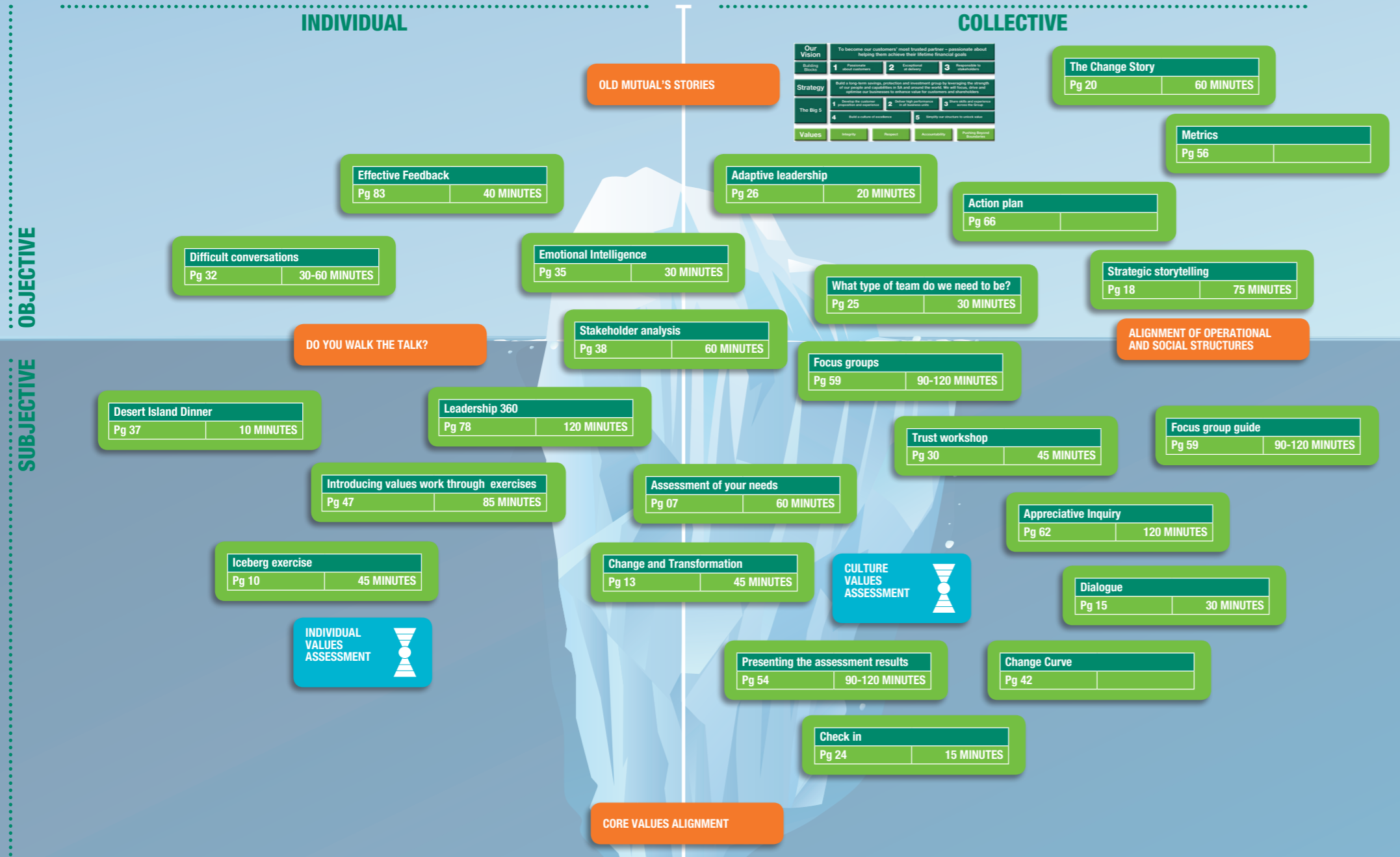




The Old Mutual Cultural Transformation Toolkit

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Introduction

The story behind this toolkit

The achievement of Old Mutual's business ambitions will depend on our ability to fully embrace and work with the potential that our people have to offer. People want to work in organisations that empower and support them in realising their potential. To feel that the organisation cares about their future, and the legacy they leave behind. In Wealth Management, our CEO has experienced first hand the power of addressing culture within Nedbank and the value of shared learning.

In 2010 work began within Wealth Management, starting with the Executive Committee and facilitated primarily by internal leaders. It required our leaders to start the change journey themselves, and we challenged them to demonstrate a difference in the way they interacted both with one another, and their teams. Cultural Leads became the core driver of this change and with the aid of the exercises in this toolkit, dialogue around values based behaviours was encouraged.

This toolkit aims to share these exercises to a wider audience, and to support (culture) leaders and their teams in a development process. From the many exercises applied and further developed in sessions over the past 18 months, we have selected the ones that are the most easy to manage. Some of the exercises are supported by suggested background reading.

We would like to thank our colleague/facilitators from Synnova, the Barrett Values Centre, thought leaders in the field of transformation and all of those leading the Cultural Journey in Wealth Management, as without their valuable knowledge and input, this toolkit would not have been possible.

Enjoy!

How to use this toolkit

This toolkit has been developed to enable you to run the exercises without any additional external help. Each exercise includes a short introduction explaining the purpose of the exercise, a guide for the facilitator, as well as step-by-step instructions.

The majority of the exercises take 45-60 minutes to complete, however a few may require up to half a day. The exercises do NOT need to be completed in a specific order, however some exercises link to others, which will suggest a logical order to follow. Together they give you a good foundation to grow our desired culture.

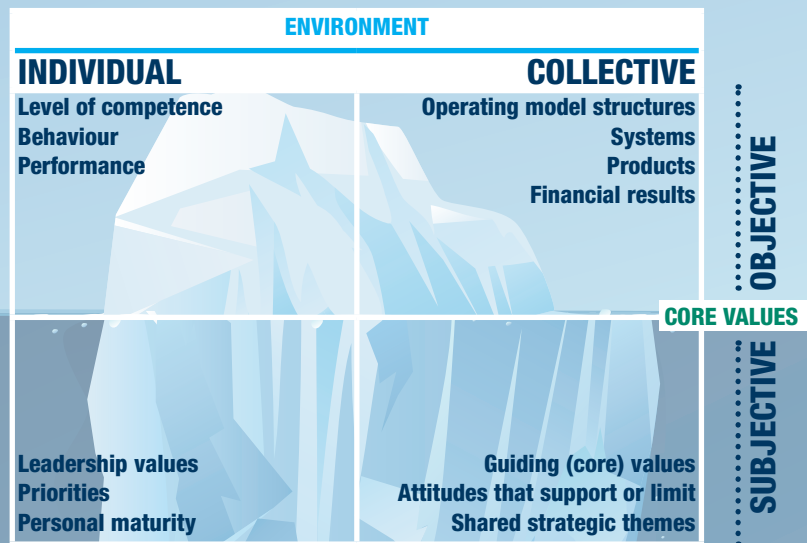
When working with the exercises, please remember that "Transformation Takes Time". Transformation will not happen overnight or purely through the completion of these exercises. We recommend that you try to put the exercises into a larger context and within a timeframe of at least a year. This will increase the teams' ability to grow, implement and sustain what they learn.

More extensive versions of the exercises are available from your Old Mutual Culture Leads team or HR business partners. In addition to helping you facilitate the exercises, they can also provide a more in-depth background to them. The Cultural Leads Programme aims at building internal capacity to foster leadership development for business acceleration. Cultural Leads are trained in this transformation programme to build our own pool of transformation facilitators, who understand and live the values-driven culture. For more background information please refer to the appendix.

TTT:
*Transformation
Takes Time*

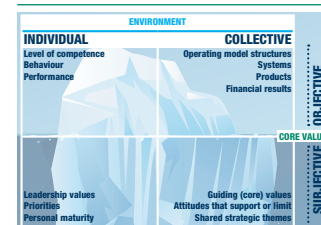
FIGURE 01
Whole system transformation

A whole system transformation calls for actions in all four directions at the same time



Adapted from K Wilber

Whole system transformation

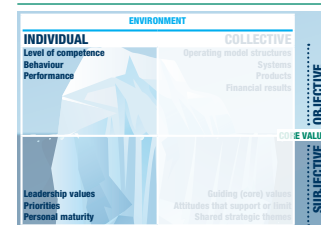


The big picture

To develop ourselves at work, we need to understand the system that we are a part of. How an individual or group within an organisation, contributes to the internal and external business environment and to society. Exchanging viewpoints will enable us to see more fully and to learn and grow as a collective. To provide some context for the discussions, we use the model to act as a pathway from the individual questions into the collective and more business focused questions.

Questions whilst looking at the whole system:

- 1 Who are our stakeholders, what do they need from us and what do we bring to that?
- 2 How do we constantly learn from our experiences and daily operations?



Do you bring yourself fully to work?

As individuals we can connect and contribute to the whole system more fully, if we feel that the culture resonates with our values and beliefs. Actively working on individual drivers, will create a deeper understanding of this chemistry.

Questions around the individual:

- 1 What are your passions in life, how do you (not) bring this to work?
- 2 What gives you, and takes from you, energy in the workplace?



Do our social structures serve us and our deliverables?

We aim to create and maintain a shared understanding and team focus on goals and strategies. The transformation work in this area, is about making it possible for everyone to understand and choose to strive in the same direction. It also enables us to emotionally connect to the rational objectives and deliverables: operating model, decisions, recruitment criteria, measurement systems, etc.

Questions around the collective/objective:

- 1 How to create clarity and commitment on team objectives between all stakeholders?
- 2 How do we best organise ourselves in delivering our promises?



Culture: what invisible forces hold us together?

In working on culture, we create a shared foundation, built on collective beliefs, and values with behaviours. Shaping an attractive, high performing culture that is built on trust, enables people to bring the best they can be and will make our organisation a great place to work.

Questions around the collective/subjective:

- 1 How is our level of trust within our team?
- 2 Among all the teams I belong to, what is unique about this team for me? What would motivate me to give more time to this team versus other teams?

Assessment of needs



A way to assess the type of intervention that would be beneficial for you, is to connect to your team's current status and energy. This can be done through an individual or a team-dialogue. You can choose to involve either a smaller group or the whole team as well as key stakeholders.

Step by Step Instructions

- 1 Ask everyone to read this paragraph.
- 2 Divide into small groups of 3-4 people. Ask them to define through dialogue which of the described areas, they feel well connected to and where they need to improve.
- 3 Ask them to reflect on one or two of the questions in the area that they selected.
- 4 Get the groups together to share learnings and to find where you need to invest more time.
- 5 Optional: select appropriate tool(s) to work with, with the help of "Working with this toolkit" figure on the inside cover of this book.

“ Never doubt that a small group of thoughtful, committed people can change the world; indeed, it's the only thing that ever has. ”

Margaret Mead

Building mindsets and capabilities

Throughout life, we shape and develop a 'mindset' with a set of 'mental models' for how we view the world around us. It is those subjective, fundamental beliefs and principles that inform the way in which we act. It acts as a filter, enabling us to quickly process large chunks of information.

Our mindset impacts our expectations and the way we measure others, or what we are likely to impose on others to be "the right way". It's defining our capacity to learn, understand, take on new thinking and it shapes the language we use to articulate our thoughts. That is why it is so important for us to become more aware of our mindset and develop the language we use to interact with others. This section will explain some of the underlying thought models, principles and beliefs that the transformation work is based on, accompanied by some practical exercises and tools for skills-building. Every perspective is presented briefly, followed by an exercise that you might ask the teams or groups of people around you when working on transformation with them.

FIGURE 02

The visible and the invisible

The Iceberg Model

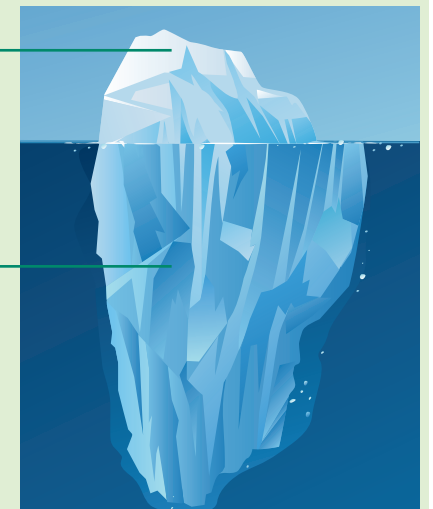
We need to focus on both levels to engage mindsets and capabilities of our people

Objective/Rational

- Competence
- Performance
- Structure and systems
- Bottom-line results
- Behaviours

Subjective/Emotional

- Leadership
- Relationships
- Belief system
- Limiting attitudes
- Priorities
- Values
- Needs



The Iceberg metaphor

Introduction and Purpose

An iceberg has only one ninth showing above the surface of the water. We work with the iceberg metaphor to illustrate situations where there is a visible and tangible portion above the surface and a much larger, invisible and intangible portion below the surface. For our work with culture we recognise that reality consists of a part that is visible to others and also for a large part that is not. Above the surface you have the rational and logical world. This world is looked upon as predictable and sequential. This part of our reality is usually depicted in plans, schedules, visions, goals, strategies, structures, processes, etc.

Below the surface are the things you don't see but still exist, like our emotions and spirit. We usually talk about them as attitudes, prejudices, patterns, feelings, beliefs, priorities, values and needs. This part, that we all know is there, is often difficult to predict and to manage. One could ask "what is it that makes the iceberg move? Is it the 'wind' above or the 'current' below?" There is a well-known saying that "Culture eats Strategy for breakfast" (by Peter Drucker) – which in reality means that whatever logical strategy (above the surface) you may come up with, you will not succeed with it unless you align it to your current and desired culture (beneath the surface).

Facilitator's Guide

Shifting behaviours and mindset is not an easy exercise. It's helpful to be in conversation around this and support participants to coach each other through some typical obstacles. When working through this as an individual or as a team, a next step might be to look at the major organisational shifts that you need to role-model for your business.



Step by Step Instructions

- 1 Introduce the iceberg model (Figure 03 overleaf) and ask for some examples of shifts that people have observed either in business or as individuals.
Examples that you could use are a shift *from* operating in silos *to* teamwork, *from* bureaucracy *to* flexibility; or *from* telling *to* inviting other people's thoughts.
- 2 Ask each participant to look at their personal *from-tos*; how do you look at your shifts as a leader?
- 3 Then ask everyone to select one shift that they would like to explore deeper.
- 4 Ask everyone to fill in the left hand side of the iceberg picture.
- 5 Ask the group to pair up and briefly discuss their thoughts with their partner.
- 6 Widen the discussion out to the entire group and ask for examples. (To kick this off it may be helpful for you to suggest an example.)
- 7 In pairs, ask everyone to consider a behaviour that they would like to demonstrate. Ask everyone to place themselves in a situation where they were living this behaviour. What would they need to think? What would they need to feel? What would they need to prioritise and value?
- 8 Ask one or two of the pairs to share their thoughts with the group.

Debrief

In the end more needs are met, in a more healthy way; search for what thoughts/feelings are helpful to have if you wanted to 'live' the new behaviour.

Picturing the new behaviour accompanied by the shift that this would require, enables us to clearly outline our goals. This might require more work than the team can support itself with.

FIGURE 03
The Iceberg Model



Change and transformation



Introduction and Purpose

We often speak in terms of changing the business: setting up programmes to develop, fix or reach something. In the past years, the ‘change-the-business’ efforts have gone up considerably and the predictions are that these efforts will become more common place. This means that the skills to facilitate changes, and the mindset of change being the norm, will only need strengthening. The purpose of this conversation is to explore and personalise the concepts of change and transformation and to have a conversation on how to role-model this as leaders.

Change happens in how we meet the environment around us and it takes place above the waterline of the iceberg-model. In order for us human beings to take on and sustain behavioural change under stress, we need to adapt and align. This often needs more than change; it requires us to transform who we are in order to shift our mindset and understanding to a new way of being. Transformation is especially important when the requested, long lasting change will have an impact on our identity, ego or beliefs.

Facilitator’s Guide

We suggest that as a facilitator to not shy away from sharing your personal transformation stories and to do this with authenticity. Linking a transformation to your own personal experience will illustrate and create understanding. More importantly, talking through your own life’s examples, will help to create the trusted atmosphere for participants in the exercises to do the same.

Step by Step Instructions

Reflecting and exchanging thoughts on change and transformation.

- 1 Ask the group for examples of transformation that people see around them or in their own life. Examples that you could use are: parents recognising their transformation after children were born, moving countries in early life or even the global shift that happened on 11 September 2001. In nature there are many examples, for instance the birth of a butterfly.
- 2 In pairs, exchange stories from your own lives of when/where a transformation took place. Take the time to share with each other: what happened and what shifted in your life because of this? How did it transform you?

Ask the pairs to also look at common patterns between them of when and how a transformation takes place.

Debrief common patterns

Transformation is very personal, yet there's always a perspective shift. Mindset and behaviours will shift to a new place of being. And, as opposed to a change, we can recognise that after a transformation took place, it will never be the same – we cannot go “back”.

“Amongst my leadership team, I think we are far more in touch with the impact that we have on staff and the degree to which we actually influence the feelings and the culture.”



Chief Finance Officer



Dialogue



Introduction and Purpose

To change the conversations in a team we need to allow a deeper exchange to take place. Dialogue will give us a chance to look deeper into what people mean, prior to forming judgements. It requires deeper listening and inquiring, to create more awareness and insight on a topic. At the end of this exercise, we should be more aware of what impact our behaviour in a conversation has on the outcome and how to achieve a better result.

Facilitator's Guide

This exercise is meant to stimulate a group, going into a deeper, explorative and meaningful conversation. It can be done in connection to an upcoming meeting or a key conversation where people have different opinions. During the introduction, this needs to be framed, and as such, might be linked to the outcomes of earlier conversations that didn't have the necessary impact, or the request for more honest communication.

Step by Step Instructions

Introduce how the word “discussion” comes from “desiccate”, to break down into pieces, define what is right and what is wrong, to state our opinion. We need discussions to determine, advocate and decide the rationales. However, the word “dialogue” comes from dia, window, and logos, stream of words: hence it means to be looking through the meaning of a stream of words, building on each other's views and trying to identify underlying causes and learn from each other. There is great power in understanding when to use discussion and when to use dialogue. This will enable you to get the most value out of a situation, and to be able to connect our rational reality with our emotional reality to utilise the full potential of team members.

Learning the art of dialogue leads to increasing non-directive communication skills and enhancing your ability to influence, being in deeper conversation with others. In dialogue: Meaning is created by “cooking together” as opposed to offering pre-cooked ideas.

Exercise**Exploring dialogue**

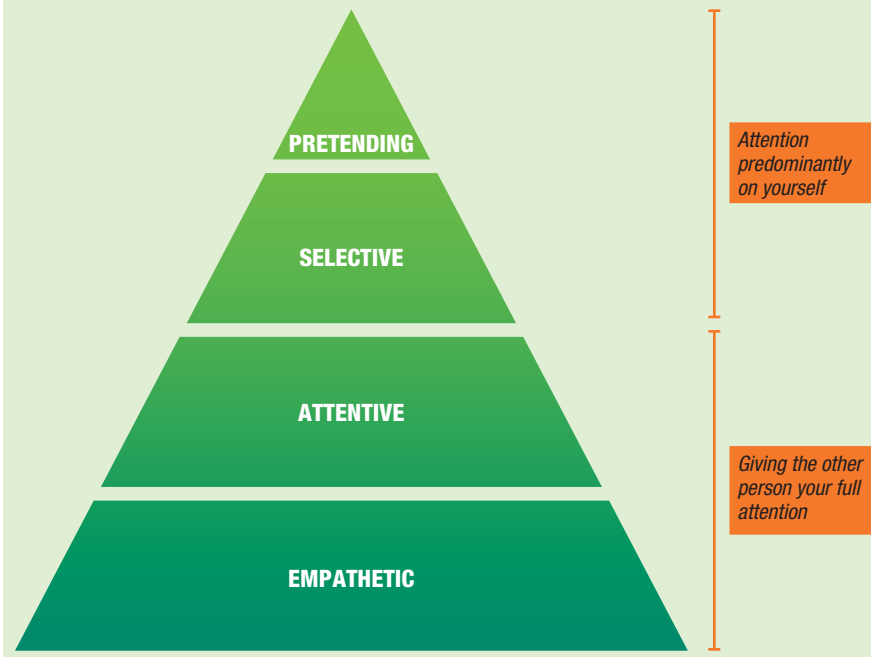
In pairs, create a sentence. One word at a time, alternate words, punctuation counts as a word. This is an intuitive exercise that works best when no notes are taken.

Debrief**A conversation is personal**

Dialogue is all about the act of listening and building relationships. Broadening your skills through dialogue means broadening your repertoire to make a connection. This is not intended to replace your skills, but to stretch you; to experience what it adds to your “toolkit”. Ask the group what skills we need for this exercise?

Examples could be letting go of lead and control, spontaneous responses, moving between telling and deeper listening, the ability to suspend judgement, etc. What value might those skills add when in a business conversation? (For more exercises, see also “Difficult conversations”, page 36)

FIGURE 04

Dialogue requires deeper listening

How to transform your leadership

Transformation of the business approach might accelerate or be blocked by the way that the business leaders operate. Their commitment to designing a new future and making the necessary changes are crucial in this process and is why we spend so much time and effort working with the leadership in this regard. In this section you'll find tools for team dialogues that aim to create more joint ownership and commitment from the leaders. In the section on debriefing the Barrett assessment outcomes, there's more information on how to use the 360 degree assessments in individual and team sessions.

“ You don't need followers to be a leader. You just need to be able to face and overcome your fears. First and foremost, you must be able to lead yourself before you can lead others. ”

Richard Barrett

Strategic storytelling

Influencing differently



Introduction and Purpose

Storytelling in business is meant to bring goals and themes to life. We encourage participants to work with their personal stories, exploring them as they provide rich lessons. As we mentioned in the section on transformation and change, stories can also be a powerful metaphor, to open the conversation on transformation.

Facilitator's Guide

Explain the purpose of the exercise and organise the work space to allow for easy movement around the chairs, as this exercise will require different groupings.

Step by Step Instructions

Exercise 1

1. Introduction to storytelling

Joseph Campbell conducted research into the patterns that stories often follow. Additional research also highlighted the importance of using examples and metaphors to make stories relevant and appropriate to your listeners. Ask the group what elements make a great story and to provide examples that highlight this.

The following are known ingredients to creating an attractive story:

Humanise it - by making it believable and possible. Set the frames before proceeding and appeal to your listeners' values and what is important to them. Make the story understandable from their perception. Relate in common terms so that listeners can apply it to themselves whilst you are speaking.

Personalise it - use names and places while respecting confidentiality and make the information personal to real people and locations.

Specify it - give sufficient details and specifics so that your audience feels involved but doesn't lose their focus with matters outside of the storyline.

Dramatize it - lay it out as if it were a movie. Keep it clear so others can see, hear and feel it.

Visualise it - psychologists tell us that most of our knowledge comes to us through visual impressions, calculating this as between 58% and 85% of all that we take in.



2 Find a partner and ask each to think of a time in your life where you had to deal with significant change (either business or personal) and in which you were successful. Take turns to tell your stories to each other (15 minutes each = 30 minutes). When listening to the story of your partner, use the skills of inquiry and reflection to bring their story to life – what thoughts, feelings or actions did your partner experience? (Listener takes notes.)

3 Then take 15 minutes to debrief together:

- What inspires you?
- What would you add or leave out?
- What powerful questions do you have after hearing this?

Exercise 2 (optional)

4 Form groups of approximately four people. Each listener takes three minutes to tell the story of their partner to the others in the learning group until all of the stories have been heard. The group then chooses the story that they think has the highest impact to share with the whole group, and the storyteller is invited to share the chosen story with whole group (plenary 15 minutes).



Debrief

Have a conversation with the group on using storytelling within the organisation.

“ My best achievement, I suppose, was to have the ExCo team decide to have a one hour talk at the meeting every month, on people and culture. So it's in the agenda every month and they take it very seriously. ”

Cultural Lead

Transformation

A compelling change story



Introduction and Purpose

Business transformation programmes are still relatively unsuccessful. Research highlights that even with increased learning opportunities, the percentage of successful transformation programmes, has remained stable over the past 20 years, is around one third. One of the key mistakes is that the transformation is a vision from only a few people and not understood and owned by key stakeholders and employees.

The change story provides us with an approach to making the transformation process meaningful and understood, tapping into a wider energy by making the transformation personal and openly engaging them. McKinsey has calculated that by expressing the vision and strategy in a compelling change story they are 3.7 times more likely to be successful than transformations with no change story. If you want to read more about this approach then we suggest you read the book 'Beyond Performance' by Scott Keller and Colin Price:

“Successful leaders often speak about formative events in their own life to show their determination to overcome obstacles and connect their personality with their vision. For instance when Andy Grove was CEO of Intel, he used his personal story of escaping Communist controlled Hungary at the age of 20 to push the company to make bold decisions as they transformed into a giant in the semiconductor industry.”

How to build a change-story?

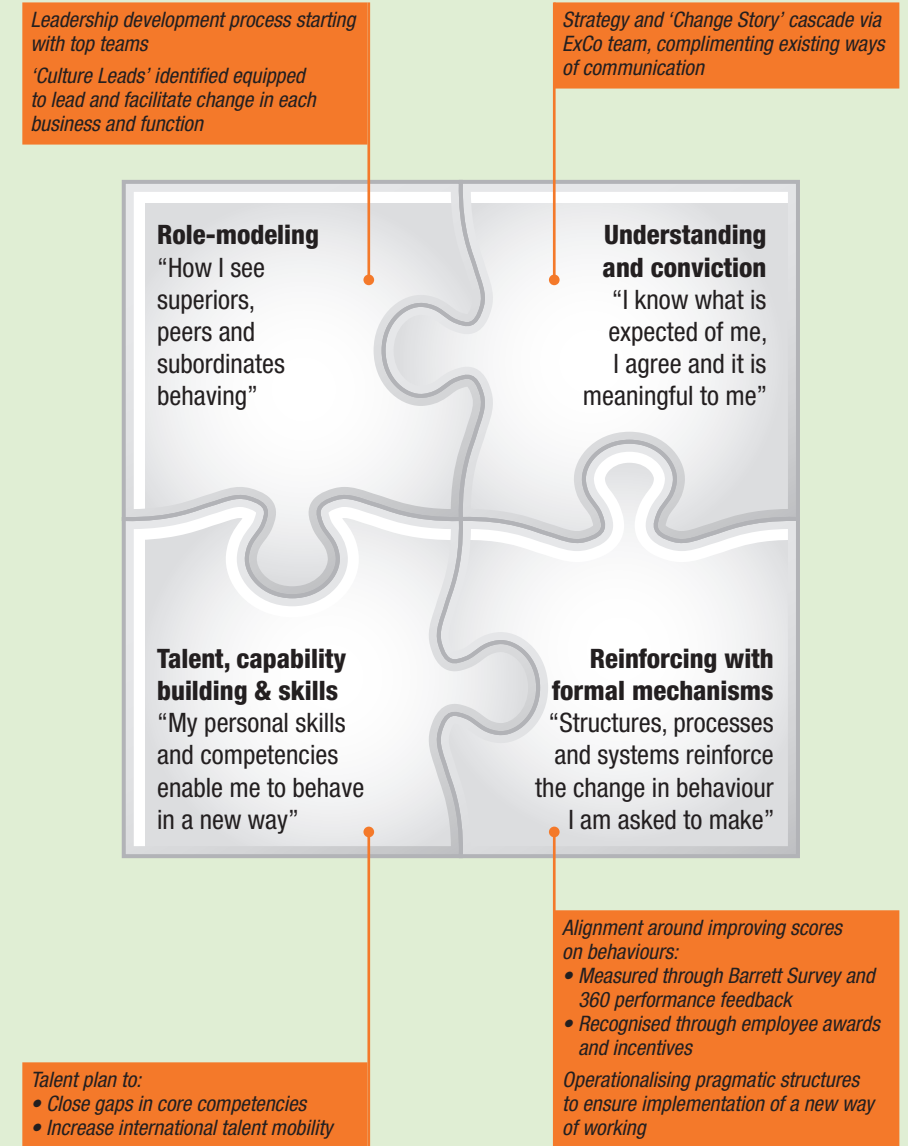
In Western story telling tradition, it is normal to communicate the “what for” and the “where to” through the following pattern:

Problem → Analysis → Solution.

This approach works fine for many analytical challenges and in most cases is a process learnt from school. Transformation stories however, require a deeper attention ‘pull’ than the more traditional linear thinking. Often, the access point of a transformation story is a compelling reason for the change and an aspiration to create something new. Provoking desire for a journey to bring about a new future that is clearly underpinned with both emotion as well as reason and is specific enough to project it into a picture of the future. The leader that offers his/her vision on the future also needs to become more visible in the story (read more on preferred story ingredients in the section on storytelling in business).



FIGURE 05
Influencing model



Model originates from McKinsey & Company

According to the influencing model there are different elements to the transformation process. The story itself provides understanding, conviction and meaning, yet it also answers some of the other questions and requests that are named in the model. An important edge will be created by integrating the facts and rational, with the meaning that is given to it and the emotional connection that the CEO has with it.

The following elements need to be considered when writing the story:

- 1 Where we are now** – How do you feel being the CEO/leader? What are the things that make you proud? What creates the need for change?
- 2 Where are we going** – Paint a personal picture of the future 3 to 5 years from now and ask yourself what excites you about this? How does this influence your own future as a CEO and the future of the people in the room? What will be your and others' roles in this scenario?
- 3 How will we get there** – What will be our journey? What will be the vision, values, strategy and culture? How do people in the company feel about this? How does this translate into short term objectives for this group? What makes these objectives so important?
- 4 What does this mean for the (top) team** – What is the behaviour change you look for amongst the top team? How will you help in this transition?
- 5 Challenges and support on the way** – What worries you about the months ahead? Are your concerns shared within the leadership team? If you put yourself in the shoes of someone in middle management, what do you think their main concerns would be? What might be uncertainties?

Implementation

Often this starts with the CEO sharing his story. The direct reports will need to give feedback allowing the story to be refined for a wider audience.

Each 'layer' in the organisation will now become the author of their own story as well as being co-author of the story one level up by providing feedback. As it cascades down through the organisation the story, becomes increasingly granular around the question 'what does it mean to me', tailored to address the level below, and linking this to rewards and consequences.

Building meaningful team meetings

In team meetings, people with different backgrounds, interests and skills work together. This makes the work interesting and diverse but also challenging at times. Due to the different personalities, team meetings can sometimes be highly effective and at other times they simply "don't work". Running effective team meetings and organising team sessions is a critical capability. In this chapter we will provide you with tools to identify, analyse and discuss this, allowing you to break through barriers and accelerate the teams' effectiveness.

Check in



Introduction and Purpose

Having a check in at the start of a meeting, helps people into a frame of mind for conversation and reminds everyone of their commitment to the expressed intention for the day. It insures that people are truly present. We often do a check in at the start of a workshop (day) and a checkout for the ending of it.

Facilitator's Guide

As a facilitator, it's important to maintain focus and energy on the speaker and the questions being asked and not to derail the meeting into lengthy comments from the other participants. A check in at a new setting is usually kicked off with the leader going first, or with a volunteer, and proceeds around the circle. If an individual is not wanting to speak, then it is fine to 'pass'.

Step by Step Instructions

The two or three questions you need are customized to your needs. They aim to inquire into the deeper layers of the iceberg such as thoughts, feelings, intentions and so on.

An example of a check in would be:

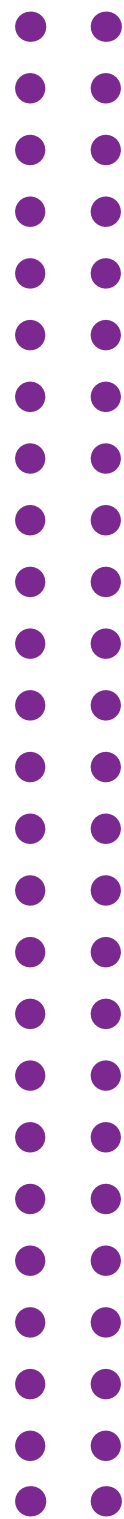
- "How are you feeling today?"
- "Is there anything that keeps you from being present here with us?"

Debrief

Once you have experienced check in or check out, you will notice how little time it costs to apply this in meetings. They can also be used as an in between check point when a conversation falters.

“ I think one of the biggest challenges is creating the right environment for people to speak out, so they know they're safe and can speak openly and honestly. ”

Head of HR Business Partnering and Cultural Lead



What type of team do we need to be?



Introduction and Purpose

To create awareness and understanding of the operational team model; Have a conversation around what are typical challenges that come up in developing this team, seen from the perspectives of each and to talk through the needs and next steps.

Facilitator's Guide

Prepare the conversation by drawing the potential models on a flip chart and/or hand-outs to take into the paired conversations. We have effectively used the model from Accenture below.

Step by Step Instructions

10 minutes – Explain the team operating models and talk through the team needs, any potential challenges and pitfalls, as well as the required leadership for each of the models.

20 minutes – Open the conversation to the wider group and discuss the type of model that this team needs to be. What might be hybrids or alternative models?

FIGURE 06

Global companies need to distinguish between very different types of teams

Information		Collaboration	
Messaging Team	Sharing Team	Coordination Team	Decision Team
Bi-lateral relationships between leader and members	Team shares information and best practices that are mutually beneficial	Team needs to coordinate activities; units are strongly interdependent	Team has joint goals that require joint decision making
Units operate as silos; limited contact required	No day-to-day coordination, no joint problem solving	Bi-lateral coordination between units is significant and critical	Team takes joint responsibility for business results
Meetings mostly used for 'messaging' from leader	Meetings used for sharing information (as well as messaging)	Team meetings used for critical coordination choices	Issues are often of cross-unit nature and requires many perspectives

Global teaming: paper Accenture, 2008

Adaptive leadership

Being on the balcony **AND** being in the dance

Transforming the way we work requires a new mode of leadership. Professor Ron Heifetz from Harvard University describes this as “adaptive leadership”. (Source: Ronald A Heifetz & Donald L Laurie, Harvard Business Review.)



Introduction and Purpose

Companies today face a range of adaptive challenges. Changes in societies, markets, customers, competition and technology, all of which force companies around the globe to clarify their values, develop new strategies and learn new ways of operating.

Adaptive challenges cannot be met by the application of routine or technical approaches. They call for mobilising an organisation to change its behaviours. Instead of maintaining existing norms, leaders have to challenge ‘the way we do business’ and help others distinguish the immutable values that need to remain from the historical practices that have to go.

A prerequisite for adaptive management is ‘Getting on the Balcony’. Business leaders have to be able to view patterns as if they were on a balcony, overlooking the field of action. They cannot afford to solely focus on the immediate action but instead need to ‘take a step back’ to see, and set, a context for change.

The dynamics of adaptive change are far too complex to keep track of, let alone influence, if leaders only remain on the field of play. To avoid becoming unwitting prisoners of the system, they must have the capacity to be simultaneously in the action and on the balcony. Leaders must reflect on a day-to-day, moment-to-moment basis on the many ways that an organisation’s habits can sabotage work. This framework can be used to set-up a conversation around the new leadership that is required or the personal shift that one needs to adapt, depending on the situation.



FIGURE 07

Adaptive leadership that transforms

Transforming the way we work requires a new mode of leadership. Professor Ron Heifetz from Harvard University describes this as “adaptive leadership”.

Companies today face adaptive challenges

Adaptive challenges are changes in societies, markets, customers, competition and technology, which are forcing companies around the globe to clarify their values, develop new strategies and learn new ways of operating.

Adaptive challenges cannot be met by the application of routine or technical approaches. Adaptive challenges call for mobilising an organisation to change its behaviours. Instead of maintaining norms, leaders have to challenge ‘the way we do business’ and help others distinguish immutable values that must stay from historical practices that must go.



Getting on the balcony

A prerequisite for adaptive management is ‘**Getting on the Balcony**’. Business leaders have to be able to view patterns as if they were on a balcony, viewing the field of action. They cannot afford to focus only on the action. They must see and set a context for change.

Whilst being in the dance

To avoid becoming unwitting prisoners of the system, leaders must have the capacity to be simultaneously in the action and on the balcony. They must reflect, day-to-day, moment-to-moment, on the many ways in which an organisation’s habits can sabotage work.

The dynamics of adaptive change are far too complex to keep track of, let alone influence, if leaders stay only on the field of play.



Source: Ronald A Heifetz & Donald L Laurie, *The Work of Leadership*, Harvard Business Review

FIGURE 08

Ultimately we should focus on a few vital mindset shifts

From transactional...		... to relational
“I am responsible for quickly and efficiently meeting the needs my clients express.”		“I am responsible for bringing the best of my company to clients and addressing their needs whether articulated or not”
“Probing my clients about their financial situation would be prying into their private affairs”		“I need to understand my clients’ full situation before I can give them the best advice”
From silos...		... to working together
“I know what’s right for my area and no one else can achieve what I can”		“I can learn from others and there is great value in ‘mining the seams’
From blame to accountability
“There is a lack of clarity regarding accountabilities around here.”		“I seek to clarify my and others’ accountabilities if they are unclear”
“I show up at each meeting so I can watch my back”		“I trust others to do what they are supposed to do in a fair manner”

“ It is not about being the top in the class. It is about becoming authentic, fulfilling your potential, and becoming the best **for** the world, not the best **in** the world. ”

Richard Barrett

Trust



Introduction and Purpose

Trust is something we often talk about in many situations, both at work and in our private life. In fact, one of the highest priorities for leaders building their teams (as has been expressed to me in the past 15 years) has been to increase the level of trust. Trust is critical in any relationship and we need to improve both our understanding of what trust is and also what we need to do in order to improve the level of trust in our relations. This dialogue tool will help you to do this.

Step by Step Instructions

- 1 Introduce the concept of trust, e.g. Stephen Covey talks of 'the economics of trust': *"Unfortunately, because trust is a perception, it is often a hidden variable that is difficult to understand, measure and improve. It doesn't have to be that way – particularly when we understand the economics of trust. The economics of trust simply state that trust always affects two measurable outcomes: speed and cost. When trust goes down, speed will also go down while cost will go up. This is a tax."*
- 2 Discuss with your group. So we need to have ways to get a feel for, and define, the level of trust in a group or team. We need to know what behaviours create or destroy the level of trust in our team. It is our ambition that this tool will support you in this aspect of your (teams') leadership. You must realise that it is about your willingness as a leader and member of the team to be aware of, and understand, both yourself and others. Through a collective, persistent and consistent dialogue about trust you will, over time, be able to build the level of trust in your team. Now, if you look at trust and its components, there are several elements to it. The model we use to simplify it looks at four key elements: reliability, acceptance, openness and congruence.
- 3 Provide handouts with the model on an A3 sheet.
- 4 Ask people to individually take five minutes to score themselves on a scale of 1 to 5 on each of the elements. How do you create trust around you in your personal life? And how do you create trust in the workplace?
- 5 Form the group into pairs and get them to exchange their scores and findings. Are there any patterns?
- 6 Ask the whole group what we as a team can learn from how we operate (differently), how this reflects on our collaborations between ourselves and what impact that this has on our clients?

FIGURE 09

Trust

Take these four elements – reliability, acceptance, openness and congruence – and apply them to your relationships. The important fact is that three of the four are not enough. In order to build lasting, ongoing relationships, all four are necessary. It often takes time to build the trust of other people and, unfortunately, only takes an instant to destroy.

Reliability	Acceptance	Openness	Congruence
Take action	Respect another's point of view	Clarify expectations	Talk straight
Keep promises	Be empathetic	Don't criticise	Don't play games or have hidden agendas
Meet deadlines	Be non-judgmental about a person	Value opinions of others	Be sincere
Be on time	Listen	Be willing to hear what others say	Set boundaries
Follow up, follow through	Allow mistakes, accept limitations	Use body language matching behaviour/talk	Make rules clear
Deliver	Don't try to change people	Be honest about limitations	Walk my talk
		Be straightforward	Don't be too kind
		Tell people how you feel; what you think and believe	

“Trust comes on foot, but leaves on horseback.”

Johan Thorbecke

Difficult conversations

Introduction and Purpose

When we think about it, we might notice that with so many people and experiences in our lives, that there are things that we know we need to say, and want to say, but we don't. Seemingly we withhold what we truly want to say and recognise that we are not fully self-expressed. We hold on to the past and sometimes it feels like it holds on to us.

These might not just be negative things. There might be praise and gratitude that we would like to express to the people within our lives, but then we are hampered by feeling awkward or that it is now too late to do so. These things from our past, about which we are not fully expressed, we can call withholds. We hold ourselves back. We may avoid certain people. We might postpone or defer what we need to say. Underneath there's mostly a projected judgement.

Being able to identify the difficult conversations in our lives, and to get complete with those people and experiences, is transformative. If we do not get complete with these things, it is like trying to sail a boat with several anchors still in place and holding us back. There are several ways to deal with this and some may need more advanced facilitation than can be explained here. For this toolkit we would like to offer two exercises to choose from.



“Something we were withholding made us weak... until we found out that it was ourselves.”

Robert Frost



Step by Step Instructions

Exercise A

Step 1

Listening without judgement – whilst you disagree

Split into pairs and select a contentious/controversial topic that you simply do NOT agree on.

Decide who will listen and who will “defend” the topic. The “Listener” may speak but ONLY to inquire using either questions such as “tell me more” or “what are your feelings...” Or to reflect with paraphrases and summary. (Two x 5 minutes)

Debrief

Discuss what you learnt about your own listening habits? What were your judgements? Can you suspend your inner voice? (5 minutes)

Step 2:

Dialogue in difficult conversations

Form triads (initiator, receiver, observer) by picking someone from the group that you have a little tension with or where there's a challenge or a bit of an edge. (three x 5 minutes)

Once formed, the initiator starts the conversation whilst the receiver will use dialogue techniques to inquire into the other person (5 minutes). The observer takes notes on what is said, how it is said, what happens with tensions/ feelings/process etc.

Debrief

Exchange how it felt to deliver the message and how it came across to the others. Then swap roles. (5 minutes)

Exercise B:**Expressing difficult feedback**

Identify someone that you have not shared some difficult feedback with and form pairs.

Prepare a statement of what and how you would want to communicate using the following examples:

- When this incident/event/experience happened... (brief, factual description)
- What I felt then and how I feel now is...
- Going forward, how I would like us to be/work together is...

Sit facing your partner. Make sure that the prerequisite of communication, full attention, is absolutely present.

Have your partner, the receiver, play the role of the person with whom you have the challenge. Give a neutral description of the person with whom you have this withhold, without using name/place etc. The person receiving this says nothing. Just receives it.

The deliverer of the feedback, owns the feedback completely by using only 'I statements'. Not making the other person feel wrong, just speaking about yourself. When the deliverer has finished, the receiver does not reply, argue or defend. At the end, just thank the receiver for playing the role.

Once the deliverer has finished (5 minutes pp.), the receiver feeds back whether it was delivered cleanly without any dumping or charge. If it was not delivered cleanly and with full attention, the receiver gives the deliverer the opportunity to refine it by doing it again.

Turn around and do this again. Then repeat this process with another partner.

**Emotional Intelligence****Introduction and Purpose**

The purpose of this session is to learn about Emotional Intelligence (EI), why EI is so important. It helps to expand self-awareness and to exchange means to build team awareness on how what team members need more or less of. This exercise provides you with a framework for dialogue.

Facilitator's Guide

Mention the importance of EI, explain Goleman's model and explain briefly the five elements with their description.

Step by Step Instructions

- 1 Provide handouts with the model.
- 2 Ask people to individually take five minutes to score themselves on a scale of 1-5 on each of the components of Emotional Intelligence at work.
- 3 Form the group into pairs and get them to exchange their scores and findings. Are there any patterns?
- 4 Ask the whole group what we as a team can learn from how we operate and how this reflects on our collaborations between ourselves and what impact that this has on our clients?

Wrap up and Summary

Ask what people learned and noticed. Remind them about the importance of Emotional Intelligence, and that it all starts with self-awareness. Ask them to make a few notes about what they have learned in their notebooks.

FIGURE 10

The five dimensions of Emotional Intelligence at work

FIGURE 11
Reflecting on your Emotional Intelligence

Please rate your skills on the five dimensions of Emotional Intelligence

Rate your skills on each of the Five Dimensions:	Low				High
	1	2	3	4	5
Self-awareness					
Recognise your own emotions and their effect					
Know your strengths and limits					
Possess a strong sense of your self-worth and capabilities					
Self-regulation					
Keep disruptive emotions in check					
Maintain standards of honesty and integrity					
Take responsibility for personal performance					
Handle change flexibly					
Be comfortable with novel ideas, approaches and new information					
Motivation					
Strive to improve/meet a standard of excellence					
Align with the goals of your group or organisation					
Be ready to act on opportunities					
Pursue goals persistently					
Handle relationships in a socially competent way					
Empathy					
Sense others' feelings and perspectives; take an active interest in their concerns					
Sense others' development needs and bolster them					
Anticipate, recognise and meet a customer's needs					
Read the emotional currents and power relationships in a group					
Social skills					
Wield effective tactics for persuasion					
Listen openly and send convincing messages					
Negotiate and resolve disagreements					
Inspire and guide individuals and groups					
Initiate and manage change					
Nurture instrumental relationships					
Work with others towards shared goals					
Create group synergy in pursuing collective goals					

Source: Daniel Goleman, *Working with Emotional Intelligence*, Bloomsbury Publishing PLC 1998

Desert Island Dinner



Introduction and Purpose

Since 1942, the BBC has broadcast a radio programme called “Desert Island Discs”. Due to its successful formula, it has become the network’s longest running programme: a guest brings their favourite eight pieces (discs) of music with which they would like to keep them company on a remote desert island.

We have adapted this formula into our programmes and have found it just as impactful: connecting a personal story through music.

Facilitator’s Guide

This exercise is meant as a fun, honest and stimulating way to get to know each other better. The set up needs to be framed in this way. When with a larger group there’s an option to either have every person share right after one another, or to spread this exercise out over a longer period of (meeting) time, e.g. right after every break in a meeting schedule.

We also use to combine it successfully with a dinner, hence the title.

Preparation

Ask participants in time before the meeting to please bring a favorite piece of music, that has a special meaning to them or that they feel emotionally connected to. Alternatively they can send the title to the organiser who downloads the music. Make sure that there is good music equipment at the venue.

Step by Step Instructions

This is an exercise where each person shares a piece of their favourite music – and before or after playing this, they tell us a story of what this music means for them, potentially on an important time of their life. The listeners can ask a question, if they’re interested in knowing more.

We sometimes create a CD at the end of the workshop, combining all the songs.

Stakeholders



Introduction and Purpose

Organisations achieve results through the co-ordinated efforts of many individuals and teams. When relationships are based on trust, mutual care and commitment and when the appropriate systems and processes are in place, organizations can grow, transform and produce superior results.

One of the roles of leaders in our collective corporate transformation is to strengthen and nurture the relationships that are so critical to our becoming the organisation that we desire it to become. The success of this shift depends on the co-ordinated efforts of many individuals and teams supported by appropriate systems and processes.

In looking at ways to influence the transformation, it's vital to notice the quality of our relationship with time and energy.

This exercise, that can be completed per individual as well as for a team, provides an opportunity to create a system map of our various relationships and then reflect in significant ways on the unrealised opportunities within those relationships.

Facilitator's Guide

A blank paper (preferably A3) needs to be provided with coloured pencils. Talk the group through the following exercise step by step allowing enough time to go through each step.

“People with high levels of personal mastery... cannot afford to choose between reason and intuition, or head and heart, any more than they would choose to walk on one leg or see with one eye.”

Peter Senge, Director
Centre for Organisational Learning, MIT
Steven Levin, CEO International



Step by Step Instructions

Put yourself in your “map” by drawing a small circle in the centre of the “map.” Label it “ME”.

Around you, start mapping the various relationships you have with individuals and teams by drawing lines in pencil to people – represented by small circles (use color pens for different groups/ types of people and write initials).

Please identify all important relationships that influence your ability to perform as an individual – some of these may be energy generating or energy depleting for you. You may put lines in between people where relationships matter for performance.

To help you with your map, answer the following questions and use the key provided on the next page:

How often do I interact with this individual or team? (That represents the distance between us on the map).

How important is this relationship to the results I produce? (Represent with a thick line. The thicker the line, the more important the relationship).

What is the current “health” of the relationship? What is the level of trust (openness, acceptance, reliability, congruence) and the quality of conversations in this relationship? Would you characterise the relationship as operating on the basis of free-flowing energy or are there energy blocks? (On the line that represents the relationship, indicate any “damage” to the relationship with a vertical line. The more lines the more energy is blocked). What, if any, relationships are significant and missing from my map?

All of these relationships are important to the performance of our organization. Some are more important than others. Put colour dots on names of the five people that matter most in the context of the organisation's performance (to achieve excellence).

Once completed (with names and colour dots), start to reflect on the quality of these relationships (level of trust, communication, joint-accountability). Add colour to some of the pencilled lines:

- Green for energy generating relationships;
- Yellow for neutral relationships;
- Red for energy draining relationships.

If each participant has created their stakeholder network picture, then provide them with reflection time with the following reflective questions that they may want to use:

- As you reflect on your relationship ‘map’, what patterns do you observe?
- Where relationships are not strong, what impact is that having on you, them, teams, the overall results produced? What would it take for them to be stronger?
- Are there strategic relationships missing from your map? For example, if you’re experiencing a bottleneck in a system, what relationships do you have that would help you address it?
- How do you feel about the current state of your map?
- When you consider your most important relationships, are they energy enhancing or depleting? What percentage of your relationships in general are energy depleting versus energy enhancing? Why? What’s your part in it?
- Are there relationships where you are over-invested? Under-invested? What’s the impact?

Discuss this with the group and look for patterns between each other as well as for patterns on how as a team you manage your stakeholders.

“ We are caught in an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly. ”

Martin Luther King, Jr.



FIGURE 12

Social networks

The Organisation from where I sit

Key

Frequency of interaction Distance from me to them
 Importance of the relationship.....

Health of the relationship

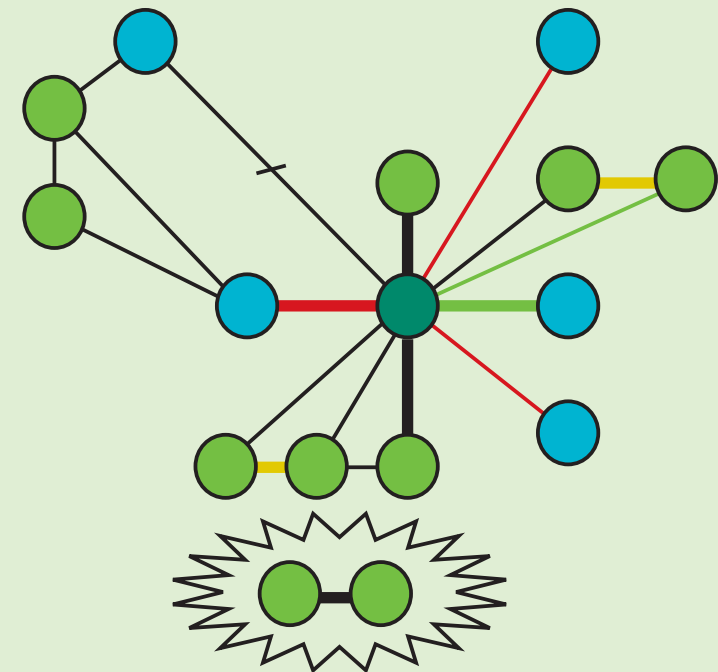
Healthy.....
 Damaged /
 Very damaged ///

Energy of the relationship

High.....
 Medium.....
 Low.....

Five most important relationships 

Missing relationships 

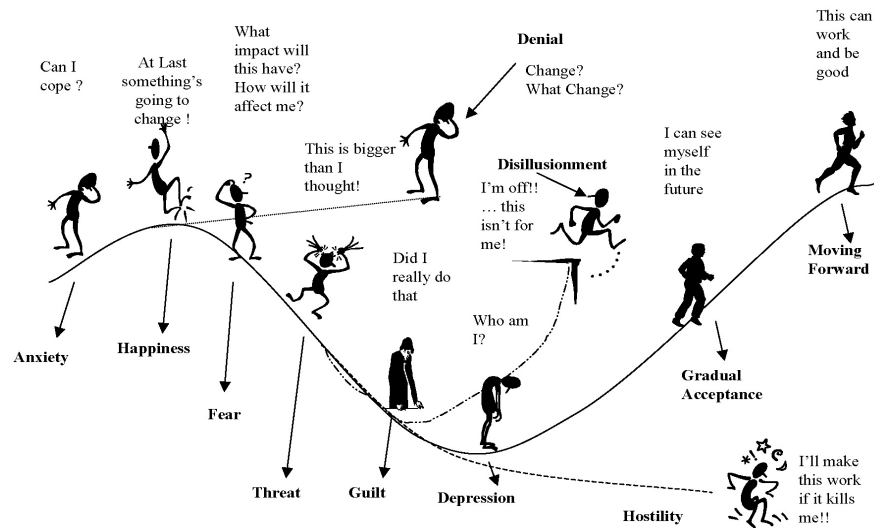


Change Curve

The Change Curve is a very useful tool when managing individual or team change. Knowing where an individual is on the curve will help when deciding on how and when to develop an exercise, what level of support someone requires. Furnishing individuals with the knowledge that others understand and experience similar emotions is the best way to build team performance.

The stages we go through on our journey are complex and may only take a short amount of time or we may be there for a while acknowledging the need for personal transformation. Much of the speed of transition will depend on the individual's self perception, level of emotional intelligence, and their past experiences. Much of the journey through the stages is done subconsciously, and may only be apparent on reflection. Also, if we have agreed change is necessary and we start to encounter difficulties we may then go into self doubt, so it becomes the lack of change that gives us the problem. Several people going through the same change at the same time will have different journeys, and will reach each stage at different times.

As a facilitator in these exercises, you will need to be sensitive to this journey and make sure you lead your colleagues through their personal transformation. Knowing when to push a team to address their issues and when to allow reflection will be key in your success.



Debriefing the annual Barrett assessment results

Barrett Tools

Introduction and overview

The Seven Levels of Consciousness model was conceived in 1997. Richard Barrett realised that with some modifications Abraham Maslow's Hierarchy of Needs could be turned into a model for mapping the evolution of consciousness in all forms of human group structures – organisations, communities, nations, etc.

The model covers both the internal dimensions of consciousness – the inner journey into self-knowledge and meaning, and the external dimensions of consciousness – the gradual expansion of our sense of identity in terms of who we are into a mission and vision around what we care about in our lives. Since 1998 it's being used as the foundation of the Cultural Transformation Tools (CTT) to map values of organisations and their leaders. As it aims to lay the foundation for whole system transformation, over time more tools were developed, amongst them a 360 degree feedback tool for leaders (the Leadership Values Assessment), that we apply to enhance leadership development.

“ I think if you take on the role of cultural lead it's really exciting. You're really playing a part in shaping the business for the future and really making Skandia a great place to work. ”

Executive Officer and Cultural Lead



FIGURE 13

Barrett Model for organisations

Glossary of terms

PV: Personal Values

CC: Current Culture

DC: Desired Culture

IROS: Individual Relationship Organisational Societal

LDR: Leadership Data Report

LVA: Leadership Values Assessment

IVA: Individual Values Assessment

SGVA: Small Group Values Assessment

CVA: Cultural Values Assessment

BNS: Business Needs Scorecard

PLV: Potentially Limiting Values

CCT: Cultural Transformation Tools

BVC: Barrett Values Centre

(L): Limiting (potentially)



Positive Focus **Excessive Focus**

- Service To Humanity and the Planet**
Social responsibility, future generations, long-term perspective, ethics, compassion, humility.
- Strategic Alliances and Partnerships**
Environmental awareness, community involvement, employee fulfilment, coaching/mentoring.
- Building Internal Community**
Shared values, vision, commitment, integrity, trust, passion, creativity, openness, transparency.
- Continuous Renewal and Learning**
Accountability, adaptability, empowerment, teamwork, goals orientation, personal growth.
- High Performance**
Systems, processes, quality, best practices, pride in performance.
Bureaucracy, complacency
- Employee Recognition**
Loyalty, open communication, customer satisfaction, friendship.
Manipulation, blame
- Financial Stability**
Shareholder value, organisational growth, employee health, safety.
Control, corruption, greed

Introducing values work through exercises



Introduction and Purpose

Creating awareness about values that people are holding, the underlying paradigms (beliefs) and about congruency or personal integrity: do they truly and fully live the values they say they have? The results of this exercise can be discussed between members of teams, to build better understanding of what's driving people and to align on if desirable.

Important is also to point at the connection between values, beliefs and behaviours. (More on this in the section with the Iceberg model.)

Exercise 1



- 1 Provide participants with the structure below. (Flipchart or handout)
- 2 Ask individuals to write in their responses to the three questions in the table. (5 minutes)
- 3 Make triads or groups of four. Discuss your answers with a colleague/in your break-out group. (20 minutes)
- 4 Ask the whole group how this was and what some take-aways are related to business or team-transformation? (10 minutes)

What 3 values are most important to you in your life? (one for each box below)	Why is this value important to you?	How do you live this value in terms of daily behaviour(s)?
1		
2		
3		

Exercise 2

Lay-out a large number of photos on the ground, and ask people to choose in silence the picture that best resonates with who they are, as a person. Alternatively ask people to bring a token or anything that shows/demonstrates who they are.



Then in break-out groups of 3-5 people:

- Share the story behind your picture (others listen to what seems to be important to him)
- Others are posing questions
 - What is important to you as a person (values)
 - Why? (beliefs)
 - How does it show? (daily behaviour)

An optional exercise is to have people jotting down their name and their value on a post-it (each value on one post-it), so they could stick that on the Barrett Model on a flip chart, on the level they think it would reside.

“ Everyone is engaged about culture and what we are also finding is people are wanting to get more and more involved in the meetings and discussions. ”

CEO International

**Reading the dotplots**

The results of the cultural assessment are shown on the dot plot provided by Barrett Values Centre. For example: See fold out Figure 14, page 51.

Most important message of the plots concern the alignment of the team or organization that is assessed. For a quick alignment-scan, we suggest the following steps, before diving into the details of the plots:

Values matches

In the left column you'll find the matches PV-CC and CC-DC.

Generally speaking, we regard two matches PV-CC as a minimum and 4-5 as optimal.

CC-DC: 2-3 matches is a nice start, 7+ is showing high alignment (and please note there where the CC is showing the here-and-now situation, the DC is pointing at the future and may take a changing context into account: therefore 10 matching values is not desirable).

Consciousness levels

Are the consciousness levels PV-CC-DC, where values are plotted, more or less at the same levels? To what extent are they differing?

Full spectrum

Does the CC (and DC) show values on all 7 levels?

Do we notice the espoused values in the CC?

Do we notice entropy in the CC? Yes? What percentage?

Entropy: <10% healthy organisation; 10%-20% watch out; >20% health and performance compromised.

Look at the IROS (L) to see the character of the problems
IROS balance shift.

What is the call if we compare IROS (P) CC-DC?

BNS: is there a clear call comparing CC-DC?

Values jumps table (in report): what message?

This quick scan can be done in 10 minutes and gives a high level overview of the health of the organisation, the (non-) alignment and the way forward.

Then using the annotated version, go back to the top and analyse the details and explore the patterns or themes showing up in the values.

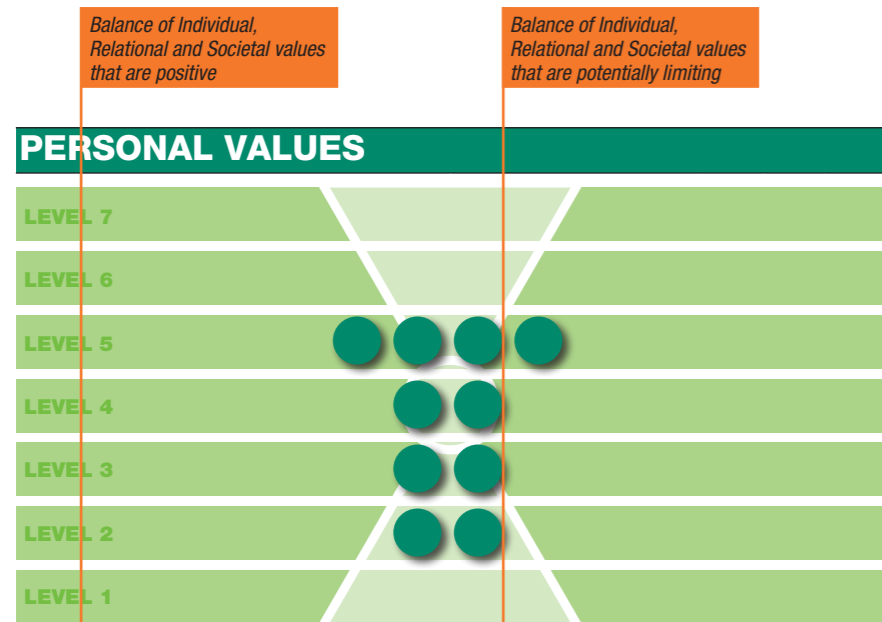
“ There's less silo approach so I'm really pleased with the way the culture's developing. ”

Chief Executive Officer



FIGURE 14

Barrett Model dotplot: cheat sheet

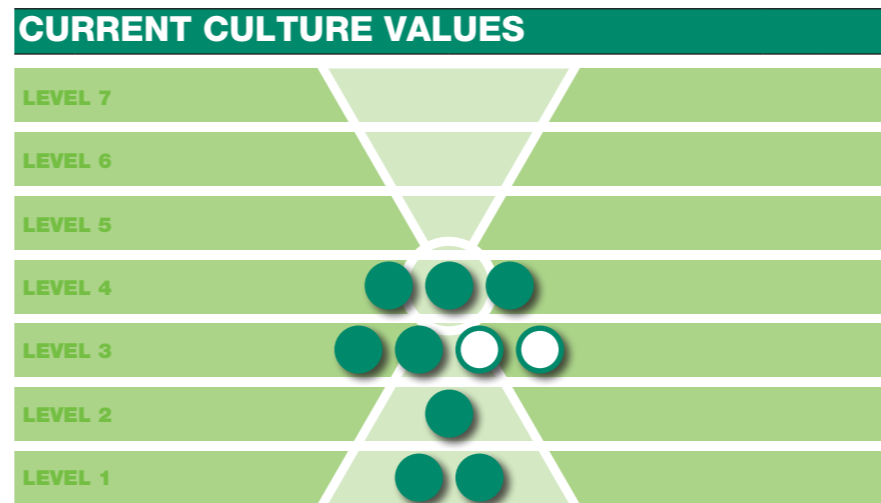


PERSONAL VALUES		IRS (P) = 7-3-0		IRS (L) = 0-0-0	
1	humour/fun	375	5	(I)	
2	honesty	354	5	(I)	
3	commitment	344	5	(I)	
4	reliability	318	3	(R)	
5	family	260	2	(R)	
6	balance (home/work)	243	4	(I)	
7	loyalty	241	2	(R)	
8	adaptability	225	4	(I)	
9	integrity	223	5	(I)	
10	efficiency	209	3	(I)	

Match between Personal Values, Current Culture and Desired Culture

Match between Personal Values and Current Culture

Match between Personal Values and Desired Culture



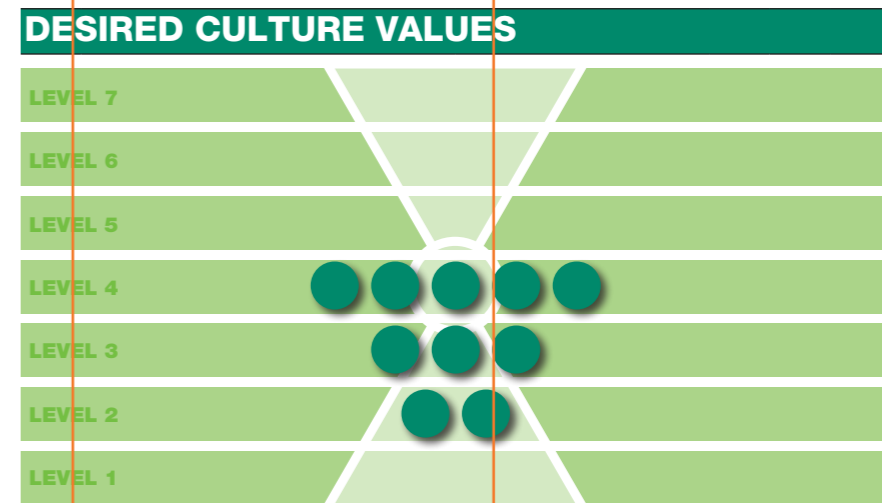
CURRENT CULTURE VALUES		IROS (P) = 1-1-6-0		IROS (L) = 0-0-2-0	
1	client focus	520	2	(O)	
2	cost reduction	344	1	(O)	
3	continuous improvement	290	4	(O)	
4	teamwork	282	4	(R)	
5	organisational growth	276	1	(O)	
6	results driven	236	3	(O)	
7	adaptability	228	4	(I)	
8	long hours (L)	216	3	(O)	
9	bureaucracy (L)	190	3	(O)	
10	reliability	188	3	(O)	

Match between Current Culture and Desired Culture

Total no. of votes for this value

Level of value

Type of value :
I = Individual
R = Relational
O = Organisational
S = Societal



DESIRED CULTURE VALUES		IROS (P) = 3-2-5-0		IROS (L) = 0-0-0-0	
1	client focus	487	2	(O)	
2	continuous improvement	361	4	(O)	
3	teamwork	295	4	(R)	
4	balance (home/work)	272	4	(O)	
5	employee recognition	257	2	(R)	
6	best practice	254	3	(O)	
7	adaptability	249	4	(I)	
8	excellence	243	3	(I)	
9	efficiency	214	3	(O)	
10	innovation	206	4	(I)	

Matches

PV + CC:	2
CC + DC:	4
PV + DC:	4

Total number of matches of each kind

Health Index (PL)

PV:	10-0
CC:	8-2
DC:	10-0

Balance of positive to potentially limiting values in each plot



Working with organisational assessments

Presenting the assessment results

90-120
MINUTES

Introduction and Purpose

Organisational transformation begins with personal transformation and most critically must start with, and be modeled by, the leadership team. This feedback workshop is designed to help initiate this process and to then cascade it through the workforce to as many people as the leaders want to support in these efforts.

Facilitator's Guide

Have the leadership team first attend this workshop with their support in later getting all the staff to attend. Run open workshops for as many groups of employees as possible with the intent of capturing everyone's input.

Prepare a presentation with the key outcomes of the assessment. This needs to contain the dot-plots. Make sure you have practiced this and feel comfortable with the material. An example presentation of the seven levels, adapted to Old Mutual language and including the Dagwood, is available through CTT trained facilitators, of whom there are many in HR.

Step by Step Instructions

- 1 Deliver the Seven Levels of Consciousness presentation (5-10 minutes).
- 2 Put results of a few other companies on the screen and invite discussion (5-10 minutes). This gives the participants an opportunity to see what the plots can show and what the white dots and other unknown items mean.
- 3 Then, ask if they want to see their results and then put on screen in front of the room.
- 4 If the group is larger than 6 people, divide them into smaller groups of 3-5 people. Give them 45-60 minutes to discuss and flipchart answers to the following questions:
 - What do they see in the results?
 - What are their positives/strengths?
 - What are their problem areas and/or opportunities for development? List their causes and possible corrective actions.
- 5 What changes need to be made? What actions are required to achieve this?

Re-convene the group and get their thoughts which can be documented on a flipchart.

Offer your insights after the discussion is complete.

Working with assessment outcomes

After receiving the outcomes from the organisational assessment, the next step is to inquire into the meaning of the results (e.g. with focus groups and workshops) and to then develop policies, practices and procedures to:

- 1 Address potentially limiting Current Culture values. Ask employees how these values are showing up in the organisation – what the behaviours are that they see and what behaviours would they like to see. Set performance objectives around the desired behaviours for all senior people.
- 2 Support any top 10 Personal values that are also Desired Culture values.
- 3 Support any top 10 Current Culture values that are also Desired Culture values especially values that have a significant jump in the number of votes.
- 4 Support the remainder of the Desired Culture values, distinguish them into reactionary values, that are a response to something occurring in the current that needs to be addressed and the new requests values, representing new things that people ask.
- 5 Address any blind spots (gaps in levels that do not contain any positive values) in the Current Culture.

“ We need to take time to pause, to consider what we're finding. ”

Cultural Lead

Metrics

- 1 These should be used with care.
- 2 Make sure they cannot drive silo behaviour.
- 3 Use wide range of metrics to track business progress.
Use entropy only at the highest level. Example metrics are:
 - Matches
 - Value Jumps
 - New value in CC and DC
 - Reduction in PLVs
- 4 Pulse surveys and Small Group Assessments can also be used to track interim progress.

“ The culture is a permanently developing thing and we have a way to go but we’ve made a hell of a good start in the initial period of time. ”

Chief Executive Officer



FIGURE 15

My Organisation's Alignment

Worksheet

WORKSHEET

My Organisation's Alignment

Based on the results of CVA, complete the following statements:

a The organisation has the following matching personal and current culture values:

.....

.....

.....

.....

b The organisation has the following matching current and desired culture values:

.....

.....

.....

.....

c The organisation identified the following potentially limiting values:

.....

.....

.....

.....

d The organisation has a level of cultural entropy of:

.....

.....

.....

.....

e The most important Value Jumps—the values that employees want to see more of are:
 These are the values that scored more highly in the Desired Culture than in the Current Culture.

.....

.....

.....

.....

f Based on the results of this survey we identified the following actions to improve the Organisation's performance:
 The goals should be SMART – Specific, Measurable, Agreed, Realistic, Time-Phased.

Actions	Description	Alignment Goal
No. 1		
No. 2		
No. 3		

What I have learned about the improvements I need to make to improve the values alignment of my organisation:

.....

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Focus group guide

90-120
MINUTES

Introduction and Purpose:

This workshop is valuable if you want a focus group to give you feedback on:

- a** The causes and corrective actions of potentially limiting values
- b** Which values are most important in the Desired Culture List?
- c** What the values specifically mean to them in any of the three lists
- d** Behaviours that do or would demonstrate the values

Facilitator's Guide

Recruit employees in whatever desired number (4-12)

Start by inviting more people in order to get the number that you want.

- Draft an invitation to meet the needs of this focus group.
- Invite peers — no employee/manager pairs and no senior executives to prevent any intimidation.
- Strive for a diverse group — different job positions, gender; cultural backgrounds, and lengths of time at the company.
- Send people in advance of the meeting something like, “These are some of the values and behaviours we will be discussing in the focus group on (date). You may want to review them now and think about which ones are most important and what they look like in action”.

Book a room and arrange for supplies

Supplies

- Overhead projector.
- Results of values assessment to project.
- Flip chart(s).
- Tape or other material to affix flip chart sheets to the wall.
- Small sticky notes or coloured dots for voting.
- Markers: five different colours.

Setup

- Tape blank flip chart sheets to walls; well spaced out so that people can easily read the charts once writing is on them.
- On a flip chart, write the Desired Culture values and cover the list.
- Be prepared to show the slides (LCD or overhead).
- If you can bring something to eat, that often helps create a relaxed atmosphere.

Report back

- Take notes during the meeting or arrange for someone to do so.

Step by Step Instructions

Welcome and introductions

- Your name and role.
- Participants' names, line of business/function, years with company.
- Why did you accept the invitation/what is your interest in this subject?

Background and outline of today's task

- Explain that we are here to talk about "... " (the intent of focus group). Prior to this session, employees were surveyed to get the most current view of what people at this company value – in essence, perceptions of who we are now as a company and what we want to be in the future".
- Outline to group why they are spending time on this topic and why now?
- E.g. "It is these survey findings we'd like to discuss today, and in probing the values to get your thoughts on (e.g. what each one means, which are most important, and how can we make them come alive)". Check if there's any questions.

Present survey results

- Review the three lists of values.
- Present some fast facts on the survey results.

Limiting Values (potentially use Limiting Values Survey forms)

- "The survey identified people's view of what is limiting our ability to succeed. (X number) of potentially limiting values were identified. You each have a piece of paper with the limiting values on it. Please write down (fill in the blanks of the form). It is important for our leaders to understand how people are experiencing these values or behaviours. So please make your comments in complete sentences or clear bullet points on how you see it.
- Gather up these sheets and inform the group that their comments will be reported anonymously.



Voting on most important values

- Uncover flip chart with the 10 desired values.
- Give people sticky coloured dots.
- Ask them to use the sticky dots to vote on the three they think are most important to the company's success.
- Review the votes. Cross out values that did not get any votes. Ask the people to defend those values that only got a few votes citing that this is their time to present an argument that might sway the second voting.
- Ask people to vote again.
- Facilitate discussion so that the group chooses a set of 3-5 values. Look to see what values are close in meaning and can be grouped together.

Defining behaviours

- From vote 2, take the top 5 values and write each one on a separate flip chart page that is already taped to the wall.
- Ask people to pair up and give each pair a different color marker.
- Ask them in pairs to go to each of the 5 sheets and write down behaviours—what do these values look like in action? Be very clear to your participants that with these behaviours this is where the rubber hits the road—this is actual guidance we are looking to give all employees. Be specific. Be rigorous in your thinking. Test your thinking by applying it to actual examples from your work experience.

Last exercise

- Ask participants: "Once we get agreement on the values and behaviours, the real journey begins—engaging everyone and making the core values real. If you were to advise the CEO on this, what are the top three things s/he and his/her leaders could do to make the core values come alive and stay real? Be specific, actionable, and measurable.
- Document suggestions.

Close the focus group

- Thank everyone.
- Explain next steps.
- Ask for some fast feedback on how the session went for people – what worked well and/or what could be improved.

Appreciative inquiry

How to move forward with the focus areas?



Introduction and Purpose

Appreciative Inquiry (AI) is an inquiry into what energises a system. It provides paths to tap, track, raise, and direct energy. Incorporating the principle that organisations and people do not need to be fixed but affirmed, AI deepens our ability to benefit from the wisdom contained within our organisations. This approach powerfully supports CTT initiatives as well as mission/vision/values alignment, strategic planning, innovation, organizational renewal, team development, and multi-stakeholder collaboration. For the purpose of this toolkit we offer you an AI approach to envision core values implementation.

Facilitator's Guide

This process uses positive inquiry to look behind the obvious, believing and wanting to understand, how everything has its contribution. E.g. limiting values in the culture survey are there for a reason – often with positive intent. When only inquiring into the value as something that “needs to be fixed” we make a mistake. By working together openly and honestly on this inquiry, we intent to build a shared commitment to our collective future. As facilitator you need to prepare a series of questions to ask for each value. When working with a large group, you may give different breakout groups a different values script to work with.

Step by Step Instructions

EXAMPLE: Win together - help others succeed/ Interdependence

Step 1

In your breakout group, please share your stories, about a time when you felt that Old Mutual Group Wealth Management or another company you were working in displayed a strong sense of interdependence. Make your description as lively as possible. Think of questions like:

- What was the situation? What were you doing? Who was with you? What was happening?
- How did the ability of your organization to develop a strong customer centricity make you feel?
- What was the most memorable aspect about this experience?
- Provide details to make the story come to life.



Step 2

- As a group, imagine a time five years from now when everyone working in this company is a living example of customer focus, either internal or external. Describe what would be happening in the organisation. What would it feel like? What would it look like?
- Exchange ideas and thoughts.

Step 3

Within your breakout group, what does the above teach you on:

- What this value MEANS for your work in Old Mutual and why it is important?
- Define how will you operate (differently) to role-model this value yourselves in the current environment in terms of your behaviour?
- Define some concrete goals/steps/actions, that you yourself want to take in order to bring this value across more in the way that you operate in your own team?

Step 4

Amongst the wider group:

- Share with the other groups your outcomes from Step 3 and have dialogue about it.
- Potentially you may choose to appoint a “value-coordinator” to hold each other accountable for this in the coming months up to a defined evaluation point.

“ Whilst one's able to set the tone from the top, it's really critical, to have dedicated individuals who go into business, spread the cultural message, and give feedback to the ExCo. ”

Chief Executive Officer

FIGURE 16

Appreciative Inquiry

Generic process

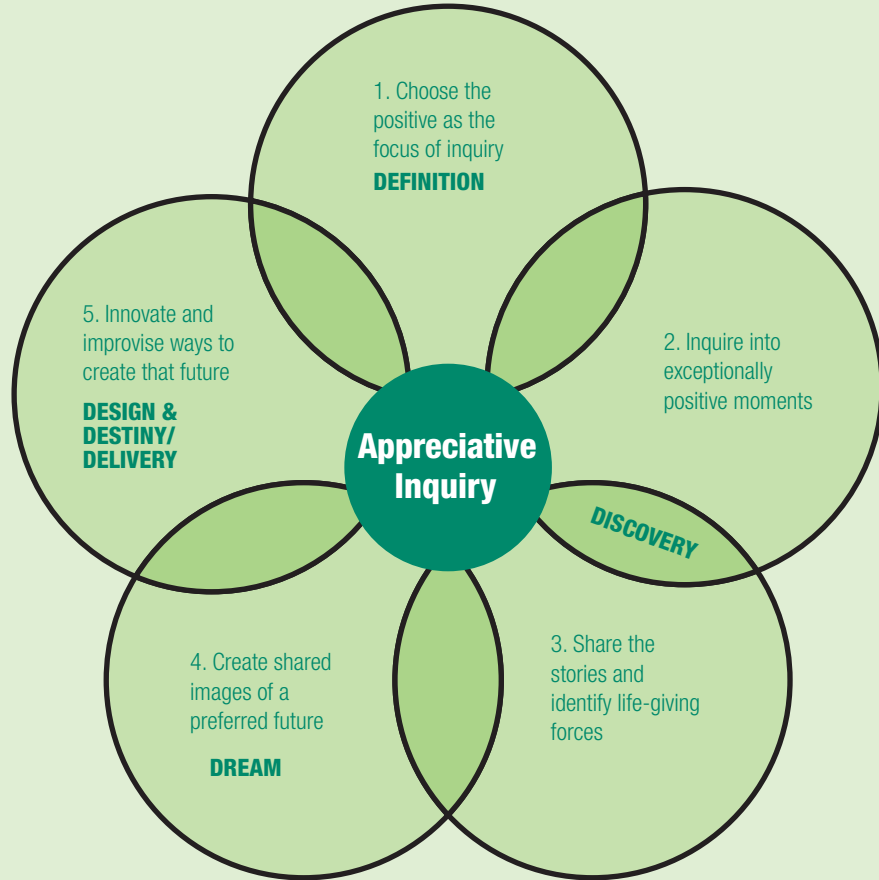


FIGURE 17

Appreciative Inquiry: Handout

Value: Describe specifics	Behaviours that you (need to) see when people operate on this value



Action plan

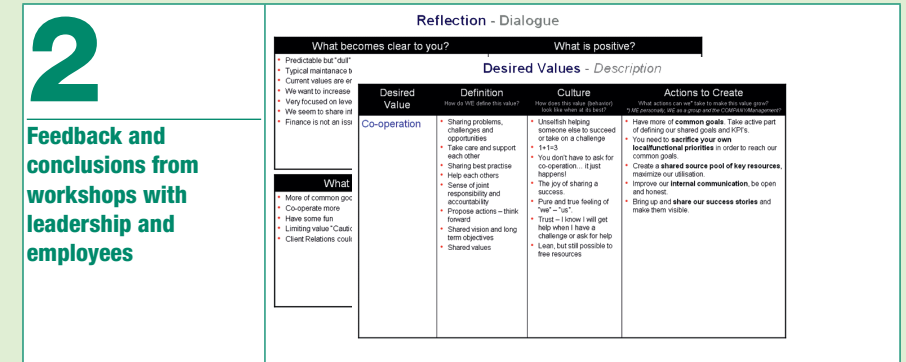
Draw up an action plan that:

- 1 Provides a clear statement of objectives, identifies measures you will use to track improvements, sets targets that you hope to achieve and package them as organisation-wide initiatives.
- 2 Tracks monthly progress on some form of scorecard.

“There’s a lot more communication, informal communication between people. People really bring themselves to work more.”

Marketing and Strategy Director

FIGURE 18
How to do and use a Culture Values Assessment (CVA)



Daily actions to live, learn and develop our desired values and behaviours

FIGURE 19

Grow our Desired Culture EXAMPLE

Rolling 3 Month Plan

KEY

- Idea, not agreed to start
- Agreed, but not started
- Started / In progress
- Done / Ongoing
- Focused areas next 3 months

Leadership commitment

- Shared compelling reason WHY!
- Personal awareness and alignment (LVA, MBTI, Vision/Mission, Trust, etc.)
- Top Management Communication and Walk the talk
- Senior Management Commitment (The Board/Steering Committee)
- All managers involvement and commitment

Organization and support

- Culture Leads (Internal and/or external support)
- Culture Guides (Facilitate wanted daily dialogues)

Define and grow an attractive and competitive culture

- Define, agree and shared Vision and Mission
- Measure present culture
- Workshops to define wanted norms of behaviors
- Handle limiting values (reduce entropy)
- Establish daily and continuous dialogues about wanted behaviors

Structural alignment

- Values Based Decisions
- HR; Recruitment, Performance review, etc.
- Reinforcement materials (visual material)

Follow up and learning

- Quarterly Culture Report
- Reflection and "Lessons Learned" meetings
- Recognition, Celebration and Rewards (Performance/Behavior Awards)
- Rolling 3 month plan: focus, actions and dates, follow up CVA

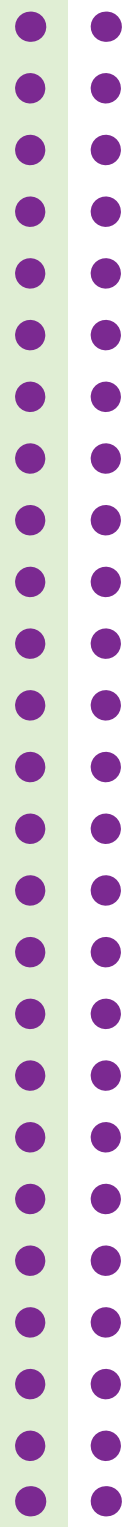


FIGURE 20

Culture Development Plan

Examples

Type	Prioritised Actions	Follow-Up (How)	By Whom	By When	Progress
		Limiting Values			
1 Long Hours	1.1 Managing long hours within acceptable and agreeable level (Less than 20% of normal working hours)	a Regular review in a weekly manager meeting	KHL	Weekly	
		b Intensive analysis on previous month's O/T performance (Staff) including personal interviews		Monthly	
	1.2 Efficient time management with individual task prioritisation and optimisation	a Listing all "things to do" every morning (or weekly or monthly) before starting work & Prioritising	All	Immediately	
	1.3 Having conference call during working hours as much as possible	a Co-planning meeting schedule considering time zone	All	Immediately	
		Desired Values			
2 Work & Life Balance	2.1 Creating "Charter of Work & Life Balance" for each person (Define, Develop, Review)	a Reviewing on a regular basis (Bimonthly) & introducing best practices to others	All Mentors	By Aug	
		b Helping them achieve it through mentoring system			
	2.2 Enhancing mind-set toward "Result Oriented"	a Reviewing deliverable quality with constructive feedback by manager	Managers	Immediately	
	2.3 Exchanging experiences and opinions with Mentors	a Developing Mentoring system	KMK	By Aug	
		b Sharing "Lessons Learned" within			
3 Open Communication	3.1 Be a good listener and humble from managers	a Showing "Walk the talk" from manager in all contacts including meeting, personal visit, team building, mails etc	Managers	Immediately	
	3.2 Sharing information more and frequently	a Sharing managers' meeting minutes	KNL	Weekly	
		b Sharing financial performance	SHY	Quarterly	
	3.3 Improving individual ability to lead a meeting and to be an opinion leader	c Having a communication day	KHL	Quarterly	
		a Giving employees more chances of being a moderator in a meeting	Managers	Immediately	
4 Professional Growth	4.1 Achieving planned individual education objectives	a Reviewing performance by manager on a regular basis	Managers	Quarterly	
	4.2 Improving systems ability	a Institutionalising English improvement and practice program (with foreigners, etc)	JHC	On going	
5 Customer Satisfaction	5.1 Enhancing mutual trust continuously based on our professional and proactive attitude	a Follow up on specifics in the global Customer Satisfaction Survey (like twin team approach program)	EYK	By Aug	
		b Regular meeting to review performances defined both in the SLA's and management level		As defined in SLA	
	5.2 More listening and quicker response from customer viewpoint	a Weekly meeting b/w CIO and AM (Account Manager) regarding pending issues	EYK	Weekly	
		b Monthly meeting b/w CIO and managers regarding customer IS/IT objectives		Monthly	

The ACT NOW! Leadership Actions

You will be familiar with the ACT NOW! Leadership Actions developed in support of the Group strategy and vision and culminating in the Old Mutual 'Dagwood', or corporate strategy framework. These are our values in action. They comprise the tool which enables you to show that, as a senior leader, you demonstrate through your own behaviours and actions that implementation of the strategy and vision is your core activity.

“ There was even competition between different departments and different units but it's not about that. ”

Director of Corporate Partners and Cultural Lead

Aim high and take your team with you

Customer first – they're the reason we're here

Treat the business like it's our own

Need to listen carefully and talk honestly

Own our decisions – decide and deliver

Win together – help others succeed

“It's not a case of coming up with some quick action plans and points and then going on to something else.”

Cultural Lead



Why is this model important?

The behaviours that we want to embed into Old Mutual by demonstrating the ACT NOW! Leadership Actions will form a core part of how our culture develops and what we are working towards making it become.

Who does this model affect?

Everyone. We expect all of our people to work towards the ACT NOW! standards of behaviour whatever their role or function. We expect our top leaders to demonstrate the leadership actions in their day to day behaviours.

How is this model used?

The ACT NOW! Leadership Actions should be used as benchmarks against which we measure our day to day behaviour. They are used to seek feedback through multi-rater reviews, to select people for roles using behavioural indicators in addition to technical skills and to build into performance objectives as the “how” of getting things done in Old Mutual.

What is the benefit of using this model?

By using the ACT NOW! leadership behaviours, we make Old Mutual a great, vibrant and dynamic place to work. And we can use the leadership behaviours to help measure progress towards our desired culture and vision. We can measure our performance and forecast progress that still needs to be made.

Aim high and take your team with you

This is about focusing on stretch; high performance; not tolerating mediocrity; energy; courage; boldness and bravery; vision; an urgent desire to win; energising others; rallying people; and inspiring others.

Customer first – they're the reason we're here

This is about understanding customer needs; being responsive; knowing the competition; learning from what competitors do well; being a customer champion; having a future-focus.

Treat the business like it's our own

This is about business acumen; being commercial, competitive and outsmarting competitors; entrepreneurship; investing resources well; driving for long-term value; being externally focused; promoting the organisation inside and out; spotting opportunities; innovating; finding new and better ways of doing things; taking calculated risks and deeply understanding implications; learning from mistakes; and managing change.

Need to listen carefully and talk honestly

This is about listening well; communicating clearly; giving and receiving feedback; being transparent; having quality, balanced interactions; displaying genuine and authentic leadership; being visible and accessible; admitting mistakes; and candour – being open and honest.

Own our decisions – decide and deliver

This is about decisiveness; accounting for risks; executing; tracking and review; persevering; discipline; determination; resilience; managing performance; simplifying; applying rigour; asking when in doubt; delivering on commitments; and focusing on results.

Win together – help others succeed

This is about holding each other to account; supporting, encouraging and empowering; challenging; empathising; sharing knowledge; demonstrating confidence in others; collaborating towards a common goal; long-term relationships; creating value through cooperation and teamwork; working across boundaries; doing more together; acting like part of a bigger team; breaking down work silos; embracing diversity; flexibility; and global understanding.



FIGURE 21

The Big 5, ACT NOW! and the Barrett model

How it all fits together

Our Vision	To become our customers' most trusted partner – passionate about helping them achieve their lifetime financial goals		
Building Blocks	1 Passionate about customers	2 Exceptional at delivery	3 Responsible to stakeholders
Strategy	Build a long-term savings, protection and investment group by leveraging the strength of our people and capabilities in SA and around the world. We will focus, drive and optimise our businesses to enhance value for customers and shareholders		
The Big 5	1 Develop the customer proposition and experience	2 Deliver high performance in all business units	3 Share skills and experience across the Group
	4 Build a culture of excellence		5 Simplify our structure to unlock value
Values	Integrity	Respect	Accountability
	Pushing Beyond Boundaries		

Integrity (5)

Respect (2)

Accountability (4)

Pushing Beyond Boundaries (4)

- A** Aim high and take your team with you
- C** Customer first – they're the reason we're here
- T** Treat the business like it's our own
- N** Need to listen carefully and talk honestly
- O** Own our decisions – decide and deliver
- W** Win together – help others succeed

A Aiming high (3); shared vision (5)

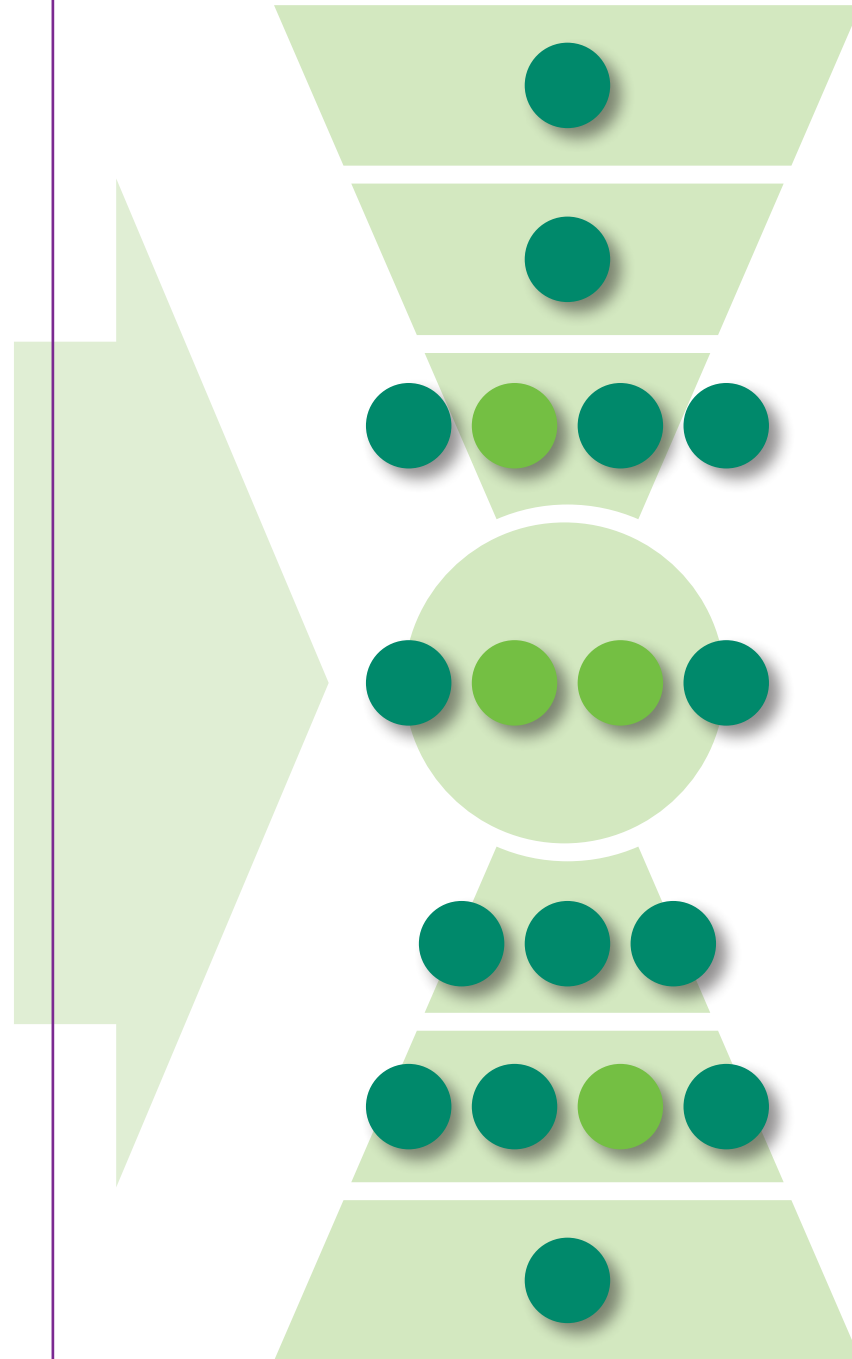
C Customer/client's interests first (6); customer satisfaction (2)

T Managing for risk (1); long-term perspective (7); continuous improvement (4)

N Open communication (2); clear communication (2)

O Decisiveness (3); disciplined delivery (3)

W Teamwork (4); internal collaboration (5); mutual support (5)





Working with Leadership Assessments

Leadership development

A 360 degree feedback session



Introduction and Purpose

The Barrett 360 degree Leadership Values Assessment or Leadership Development Report is a developmental tool that looks at the values that leaders currently use to expose their current strengths and weaknesses and provides a few directions to take forward.

Facilitator's Guide

Make sure that the setup/room where this exercise takes place is private, that you will not be disturbed and that there's confidentiality. In delivering the feedback we often work with underneath protocol, based on a coaching approach that delivers the outcomes in a positive framework.

“Most importantly the culture leads have been a very good conduit for gauging the mood on the floor and for soliciting staff feedback.”

Chief Finance Officer



Step by Step Instruction

Debriefing 360 degree results

Introduction and goals

- Opening – explain background.
- Purpose is to look at the outputs from your LVA/LDR: help to understand its implications.
- Confidentiality and note-taking.
- Check: what specifically, if any, do you want from this session?

Contextualising: asking

- What is the daily role and what are some facts around the work (length, likes/dislikes etc).
- What are the strengths in how you act (and how do other people see this)?
- What do you want to improve on or stop?

Analysing and interpreting results

- Explain the 7-level leadership model.
- Reveal the LVA or LDR dot-plot. Look at assessors' top 10 current/desired values. Check: 'What do you feel when looking at this?' 'What are people recognising in you?' 'What do you understand this to be about?' etc.
- Potentially Limiting Values if any: 'Where are these words coming from? 'How much is an over-played strength?'
- Go through Assessment, then summary and results.
- Matching Values/Non-matching values – are you aware of them? To what degree?
- Walk through Indices, PLVs & blind spots. Stated strengths/development needs.

Action Planning

- Check out which of your values were not picked up in the top 10 choices of your assessors. How important are these to you? Which do you want to come across more effectively? What could you do to ensure that these are recognised in future?
- Imagine for a moment that you are already demonstrating your very best leadership style. What will you see, hear and feel that will be different? What will you be doing differently?
- Suggested areas for improvement: start action planning on each area, including areas for development that have emerged during the session.

Session Wrap-up

- What are the highlights from this session for you?
- What are your take-aways?
- What will be the first change that you will make and when?
- What support do you need to achieve this?
- How to feed back to assessors to say 'thank you' and closing the loop?
- Suggestion to also share with spouse/significant other – this may be a good person to act as support (and may even give additional feedback).

“ Sitting back to take time to really deeply understand the issues I think is really important. I found it a personal challenge. ”

Head of Business Support & Analysis and Cultural Lead



FIGURE 22

Barrett 7 Levels of Leadership



Positive Focus ***Excessive Focus***

Service to Humanity

Long term perspective, future generations, ethics.

Collaboration with Customers and the Local Community

Strategic alliances, employee fulfillment, environmental stewardship.

Development of Corporate Community

Positive, creative corporate culture, shared vision and values.

Continuous Renewal

Promotes learning and innovation, team builder, empower others.

Being the best, Best Practice

Productivity, efficiency, quality, systems and processes.

Bureaucracy, complacency

Relationships that Support Corporate Needs

Good communication between employees, customers and suppliers.

Manipulation, blame

Pursuit of Profit and Shareholder Value

Able to manage adversity, directive, willing to take charge

Exploitation, over-control

Hot chair team exercise

Leadership feedback dialogue



Introduction and Purpose

After each individual has received their 360 degree feedback, the results of those will be taken into a team dialogue. Purpose of this is to shift the team's focus to a joint responsibility for one another's leadership as well as it is an exchange of feedback to create clarity on personal leadership impact.

Preparations

With plenty of time upfront (best directly after debriefing the 360 degree) ask each team member to decide what it is they want to share and to prepare themselves for a conversation in the team.

All are invited to take their report and action plan to a follow-up meeting and to prepare a 5-10 minute sharing on:

- Reflections on who you are as a leader (headlines).
- Key points from the 360 degree and how the feedback felt. (What made you happy/disappointed?)
- Questions that you might have to ask this team about the feedback?
- Share what you commit to do for your personal growth and development.

FIGURE 23

FEEDBACK: Do's/Don'ts

Optimum feedback approach

+ Positive feedback	Δ Delta
Always start with the positive	State one thing you would like to see more of or less of
Give three pieces of positive feedback	Be specific and clear
Clear examples	Check understanding
Observable behaviour	Finish the conversation there
The impact on you and others	
Tip Don't wait for formal performance reviews – feedback is the oxygen of change and people will develop faster if given feedback on an ongoing basis	Tip Don't get involved in long explanations or responding to defensiveness. Suggest you meet later when they have had a chance to reflect

Facilitator's Guide

Place chairs in a horse-shoe, Give a time indication of 40 minutes per person. 10 minute introduction, followed by two 5-10 minute feedback conversations and 5-10 minutes for questions and a closing response from the person on the "hot chair"

- This session needs a clear framework and can only be done when there's trust and willingness to learn from one another's feedback in the team. When you hesitate, ask for support facilitation.
- Set up the session with the clear intention to support each other and to move the team forward.
- Confidentiality is linked to trust – meaning that there is to be no repeat of what is said in the exercise – apart from your own story.
- Important for the receiver of the feedback to not respond to any feedback until everyone has had a chance to comment and then to ask for clarity. No explanation is needed and a 'thank you' will end the round of feedback.
- Mirror back when tone gets defensive.
- See that all voices are in the room.
- Ask team if they are willing to 'sign up' for this person's plan before closing comment from hot chair is invited.

In closing the session we suggest that as a facilitator you:

- Repeat the intention for this session.
- Ask how this was.
- Repeat confidentiality needs.

Step by Step Instructions

- 1 Explain the concept for giving and receiving feedback and revisit the feedback rules. (We advise feedback to be +/-delta, so that both the strengths are clear as well as any developmental points, and will offer the team to first all comment on the strengths in a first round of sharing, and then all comment with feed forward on the developmental points in the second round.)
- 2 Take notes of all that is said from and towards the hot chair, as a reflection and summary for the person in the hot chair.
- 3 First person takes a seat in the hot chair (it may help the process if the leader decides to go first) and tell their story.
- 4 Round of feedback. Focusing on what is a strength I most appreciate in you? Or what makes you great in my eyes? This round ending with a brief response from the person in the hot chair.
- 5 Second round of feedback: each person in the room now contributes with a statement on "what blocks your greatness in my eyes is..." After each has spoken we again ask for a brief response from the hot chair.
- 6 If needed (hot chair to decide) time for clarifying questions.
- 7 Close, quick break before the next person takes their seat.

“ One of the biggest things about being a cultural lead is that you need to get people to take ownership for the cultural transformation. ”

Cultural Lead

Appendices

Appendix 1

Roles in Culture Transformation

Roles	Responsibilities
WM, EU, ExCo	Walk the talk, be a role model for our values in leadership behaviours and business planning. Keep the transformation programme honest
	Accountable for culture shifts and healthy behaviours
	Not to drive cultural transformation as an HR initiative
Culture Transformation Core Team	Walk the talk
	Coach ExCo in role-modelling and setting the direction
	High-level monitoring and follow-up
	Train, Coach Culture Leads, Culture Network
Culture Leads (senior managers)	Walk the talk, mentor and challenge top leadership, facilitate conversations
	Skilled in applying methodology and extensive toolset for transformation
	Not allowing blame and dysfunctional behaviours
	Believe in the value of working with culture, be passionate about it and able to inspire others
Culture guides (union, wider management, HR)	Have natural leadership skills and the ability to take own initiatives
	Walk the talk
HR	Skilled in a "light" version of the transformation toolbox: dialogue, values conversations and influencing transformation
	Act as Culture Transformation facilitators and knowledge of CTT assessment and facilitation
	Trained as Culture Leads or guides and operate hand in hand with business leaders
	Not to own the culture agenda nor to drive the plans – this belongs to the business

Your notes



Appendix 2

Cultural Change Journey

Whole Systems Approach

Wave 1

Driving Top Team Alignment

- Leadership Development Report
- Leadership Workshop

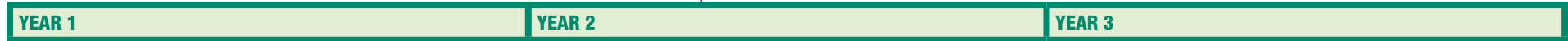
Capacity Building

What do we mean here? Any change programme needs to be owned and driven by the business, supported by people who understand:

- The need
- The vision
- The how

This group needs to be much wider than the senior leaders. Within Old Mutual we are developing the concept of 'Culture Leads'. These are senior influential people able to engage across the business in maintaining and driving the 'dialogue' of Cultural Change. Further they are the eyes, ears and conscience of the senior leaders (they mentor and coach upwards).

FOLD LINE



WAVE 1	WAVE 2	WAVE 3
Top team alignment and capacity building	Wider management and structural alignment	Mission alignment
Begins with the Board and culture leads. This later expands to the larger leadership group including managers and supervisors	New employee/executive selection	Integrate the vision and mission of the organisation into the executive and employee population
	New employee/executive orientation	
Wave 1 & 2 are partly executed in parallel and might take up to two years. Board engagement and commitment sets the tone. Their journey will inspire the rest of this process	Employee/executive performance evaluation	
	Employee/executive promotion criteria	
	Talent selection and development programmes	
	Management development programmes	
	Leadership development Programs (including change management and Leadership Model)	
	Values awareness programmes	
	Values alignment	
	Integrate the core values and behaviours of the organisation into the executive and employee population	



Inside back cover