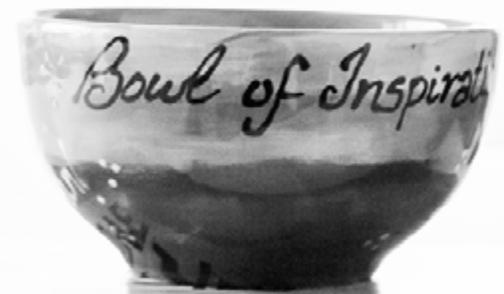


# the Roundtable Mentoring MATTERS

*Leading in a  
world of change.*



the  
roundtable ™  
Where Leaders Cultivate Leadership, Together

Volume 2

Once again, we're pleased to issue another volume in our Mentoring Matters series. We're living in a world of work where the pace continues to get faster and the demands greater; the advancements in technology are constant; jobs are no longer secure; careers no longer follow a straight path; and how we strike the balance with work and personal needs is an ongoing struggle for many of us.

In this *Leading in a World of Change* installment of our Mentoring Matters e-book series, we dive head first into some of the hot topics that keep agile leaders up at night.

At The Roundtable, we know that leadership isn't learned in a binder. We learn best by doing and we learn even more when we share our knowledge and experience with others. We see it every day in our group coaching and team coaching work. There is value in connection and so much wisdom to share.

For this series, we've compiled the advice and perspective of 11 leaders who collectively tackle 5 tough leadership questions related to *Leading a World of Change*. I expect you'll find lots of practical tips and strategies that you will be able to action immediately. And, I guarantee you'll enjoy the varied perspectives and ideas that you'll find from the leaders involved.

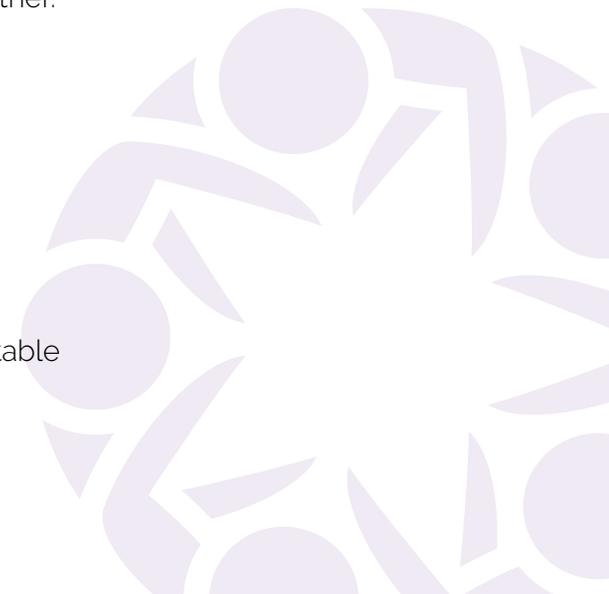
If you'd like to share wisdom in a future edition of Mentoring Matters, we'd love to hear from you.

We are the Roundtable, a place where leaders cultivate their leadership, together.

Happy leading!



Glain Roberts-McCabe  
Founder & President, The Roundtable



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## Chapter 1

Q

*"I've spent most of my career managing teams that sit near me in the office. I'm now moving to a national scope and will be leading people from a distance. What tips do you have for managing a virtual team successfully?"*



*These leaders share their advice on what to do to successfully manage a virtual team.*



**HAYDEN ALGE**  
Director, Digital Strategy  
**Workopolis**

Hayden shares his David Letterman style "Top 10 List" on how to successfully manage a virtual team.



**STEPHEN MILES**  
Chief Operating Officer – International  
**Harlequin**

Stephen highlights the importance of gaining commitment to strategy and goals with virtual employees, and outlines some further tips for working with these remote team members.

*"I've spent most of my career managing teams that sit near me in the office. I'm now moving to a national scope and will be leading people from a distance. What tips do you have for managing a virtual team successfully?"*



**HAYDEN ALGE**  
Director, Digital Strategy  
Workopolis

Having had the experience of managing both local and remote work teams, here's my David Letterman style "Top 10 List" on successfully managing a virtual team, or a team that has virtual members.

### **1. STAY CONNECTED AND BE AVAILABLE**

Make sure to schedule re-occurring, one-on-one, check-in chats with your team, perhaps more frequently with your remote members. Ensure you are always willing and able to entertain a chat in between these routine meetings.

### **2. CONSIDER ATTITUDE**

Make sure you have the right people with the right attitudes and behaviors to be effective remote employees—this is not for everyone.

### **3. PROVIDE CONSTANT FEEDBACK AND REWARD PERFORMANCE**

Provide constant feedback and reinforcement. Never assume your team feels appreciated; make the extra effort to reinforce the right behaviors and reward them accordingly and let the rest of the team know (those near and far).

### **4. EMBRACE TECHNOLOGY AS YOUR FRIEND**

Embrace modern communication technologies—video is a great way to stay connected and "keep face." Also consider using instant messaging systems like Skype to keep casual conversations owing and an informal communication channel open.

### **5. LEVEL SET EXPECTATIONS**

Treat everyone alike, despite workplace circumstances. Expectations around job performance and overall output productivity should be tolerated equally with the same accountability from all contributors.

### **6. ENCOURAGE CROSS-FUNCTIONAL INTERACTIONS**

Encourage cross-functional relationships to blossom between your remote team and other key cross-functional stakeholders. This will make them feel more connected with the business, especially with those who they rely on at head office.

### **7. SHOW FACE**

Ensure that you create some face-to-face time. Make a couple visits every now and again to your remote markets or invite the team to visit you for a team check-in/meeting to keep the team feeling connected. No one likes to be excluded from the conversation.

### **8. SPREAD THE LOVE**

Ensure that you don't discuss or share work-related updates (as small or insignificant as they may seem) without including your remote contributors. Keep them all connected and involved equally at all times.

### **9. TAG TEAM**

Appoint SME (subject matter expert) roles amongst team members. Each contributor will act as a subject matter expert whereby they will be responsible for providing timely updates to their team members. This will keep the team connected and your remote contributors will appreciate it.

### **10. TRUST YOUR TEAM**

Nothing is worse than being a pessimist. Trust that your remote team knows they are respected and performing to the standards and expectations that you have of them. In turn, you will see a much more engaged, confident, and happy team—this trust will be reciprocated. 🌐

*Managing a remote team is now becoming much more common as companies embrace national and international business opportunities and matrix organizational structures.*

A key distinction in remote teams is that they have more latitude with their time, their work environment, and the process they apply to get work done than they would if they were just down the hall from you.

Distance, time zones, and potentially language and culture (depending on how distant your team is) can amplify this even further. With this in mind, there are a variety of things to think about when deciding how you manage differently with a remote team.

*However, the one thing that holds true, whether your team is local or remote, is the importance of bringing them onside to your strategy and goals.*

Once you've done that, there is less likelihood your projects will be pushed aside. They will manage their own environment and process to get the work done and you will have the confidence of their commitment, even though you have less access to monitor progress.

Once you have your remote team aligned and committed to your goals and strategy, here are a few considerations for how you may approach things a bit differently than you would a local team:

#### **COMMUNICATE CLEARLY AND SPECIFICALLY**

You will communicate with remote team members less often, and it will be with more structure. You will not bump into them in the hall several times a day. So, it is important to be very clear and very specific on what needs to get done, by when (objectives, actions and due dates); to be clear and explicit in your expectations; and to offer your support.

If language or culture is an issue, choose shorter words, don't use jargon and drop the use of all the latest buzzwords. Short, clear, specific and understandable—that is the goal. It won't get the transcript of your call published in Wired Magazine, but it will get your team working on the right things.

#### **FOLLOW-UP AND PROVIDE FEEDBACK**

Touch base with your remote team on a regular basis and provide feedback on a regular basis. Put follow-ups in your calendar so you don't forget—even if it is just to remind you to drop them a note to ask, "How are things going?" twice a week.

*It's hard to keep them top-of-mind when you don't see them day-to-day, so leverage tools to help you.*

You will not see your remote team members at the coffee machine so you need to actively create the opportunity to catch up.

*"I've spent most of my career managing teams that sit near me in the office. I'm now moving to a national scope and will be leading people from a distance. What tips do you have for managing a virtual team successfully?"*



**STEPHEN MILES**  
Chief Operating Officer –  
International  
**Harlequin**

As it relates to feedback from a distance, remember that it's not always as easy to "get a feel" for where you stand over the phone or in an email. Don't make them guess—tell them. Be specific about what they are doing well and what they need to improve or change.

### **BE THEIR TEAM LEADER NOT THEIR "HEAD OFFICE"**

Coming from head office can have a lot of negative connotations to the distant office. I used to work for a company that called them seagulls. Head office flies in, squawks a lot, craps on everyone and then flies away again. Work hard not to be that manager. Build a relationship with your distant team so they really feel you are with them, part of their team.

### **LEVERAGE COMMUNICATION TOOLS APPROPRIATELY**

There are various ways to connect and communicate. Choose the appropriate tool for what you are trying to achieve and use it effectively. Here are some considerations:

In person visits are particularly important when you first start to manage a remote team. Take advantage of every minute you can be together. Get to know them in business and personally. Lunch, coffee, meetings, etc. Ask a lot of questions and listen actively—"small mouth, big ears." You want to quickly get a feel for how much rope you can give them so they are empowered and successful but do not hang themselves.

Video/Skype is almost as good as being there. It conveys emotion, conviction and concern better than the phone or email, which are critical leadership messages that are sometimes lost with distant teams. It does not have to be overly formal or structured. Take two minutes just to ask, "How are things going with project X?"

Telephone does not allow you to use body language, or facial expressions to help you communicate, but can be very effective when combined with other tools such as screen sharing. If you are using the phone for a conference call, remember a few best practices: ask everyone to mute their phones except to talk; introduce everyone on the call or in the room; and engage everyone by asking each attendee by name if they have questions, or input, etc.

Email is the most commonly used tool, but least effective, except to communicate facts. It is easy to misinterpret, hard to convey intent, emotion, passion, etc. You will inevitably use it regularly, but push yourself to use the other tools that are much better at helping you lead a high performance team. 🌐



## **LOOKING FOR MORE RELATED READING?**

**Lessons Learned: How to manage a virtual team**

**The Seven Habits of Highly Effective Virtual Teams – By: Paul F. Alexander**

**Managing Virtual Teams – By: Joe Willmore**

**The Distance Manager: A Hands On Guide to Managing Off-Site Employees and Virtual Teams – By Kimball Fisher**

## The Bottom-Line:



1. Stay connected and be available.
2. Consider attitude.
3. Provide constant feedback and reward performance.
4. Embrace technology as your friend.
5. Level set expectations.
6. Encourage cross-functional interactions.
7. Show face.
8. Spread the love.
9. Tag team.
10. Trust your team.



**Gain commitment to strategy and goals...** this is an important foundation.

**Communicate clearly and specifically...** objectives, expectations, actions, due dates, feedback.

**Put structure in place...** schedule regular touch points, and put reminders in your calendar for some informal check-ins.

**Leverage communication tools appropriately...** consider and choose the right tool for what it is that you are trying to achieve – in-person, video/skype, telephone, email.

**Establish a positive relationship...** let them know you are available for support and that they feel you are with them.

## Chapter 2

Q

*“Our company is in cost-cutting mode and I’ve been told I need to lay off three people on my team, each of whom has worked here for a long time. I’ve never done this kind of layoff before and am feeling pretty anxious about it. How can I make sure things go as smoothly as possible in this difficult situation?”*



*These leaders share their experience in making things go as smoothly as possible in the difficult situation of cost-cutting layoffs.*



**SILVIO STROESCU**

President, BMO InvestorLine  
**BMO Financial Group**

Silvio highlights the importance of focusing on 'fair' in these difficult situations, and reminds us how this comes into play before and during the conversation.



**ALISON DE LUISA**

Associate Vice President, Student  
and Employee Development  
**Cambrian College**

Alison shares her best practices for a smooth process in these difficult situations.



**TREVOR LEWINGTON**

CEO  
**Economic Development Lethbridge**

Trevor shares his thoughts on how to prepare to deliver tough news and also empower the team member to move forward.

*"Our company is in cost-cutting mode and I've been told I need to lay off three people on my team, each of whom has worked here for a long time. I've never done this kind of layoff before and am feeling pretty anxious about it. How can I make sure things go as smoothly as possible in this difficult situation?"*



**SILVIO STROESCU**  
President, BMO InvestorLine  
**BMO Financial Group**

This is one of the toughest conversations for a leader, and it's normal to feel anxious about it.

What makes these situations tough is that as leaders, we don't always have full control over our folks', or even our own, employment with an organization.

Macroeconomic shifts and mergers and acquisitions are often outside of a leader's control and can lead to circumstances where functions and teams get dismantled

or transferred. There are often no short-term wins in these cases, so the main goal is to support a positive rebound towards next steps.

*You can get through the tough by focusing on fair.*

This starts well before your discussion with the employee. If layoffs are indeed the only viable option, then make sure you've done what you can to ensure that the folks impacted are treated fairly.

#### **SEVERANCE AND SUPPORT**

The severance package needs to be fair. Fairness should also include support for those impacted by the change to get back into the market. This support could take the form of counseling and coaching via firms that specialize in this area. The coaching is especially beneficial for folks who have worked with the organization for a long time and may not have recent experience with job searching. If you have an HR team, definitely engage them for guidance and support.

#### **KEEP IT ABOUT THEM**

The conversation itself should be focused on supporting the person impacted by the change. Don't dwell on the hard times for the business, and definitely not on how hard it is for you to deliver this message or position yourself as "just the messenger."

Focus instead on how you and the organization will support with the rebound.

#### **SHOW EMPATHY**

In these cases, it's actually not helpful to try "softening the blow" by not getting to the point right away or painting a picture of a broader context. Be direct; don't hem and haw.

*Say what you need to say, honestly and with compassion.*

I believe in the "Amat Victoria Curam" ("Victory Loves Preparation") principle. With this in mind, remember that one of our responsibilities as leaders is to set our folks up for long-term career success. We do this by focusing on our folks' development on a consistent basis, not just when times are tough. We commit to providing feedback on a timely basis and taking a disciplined approach to career development. As such, the core support mechanisms to develop transferable skills and build career resilience should already be in place before you walk into the room to have this tough conversation.

If we do this part well, then our folks will have the confidence and resilience to rebound. There is light at the end of the tunnel. 🌟

#### **LOOKING FOR MORE RELATED READING?**

**Mind the Gap: Strengthen your mindset to get through tough times**



*"Our company is in cost-cutting mode and I've been told I need to lay off three people on my team, each of whom has worked here for a long time. I've never done this kind of layoff before and am feeling pretty anxious about it. How can I make sure things go as smoothly as possible in this difficult situation?"*



**ALISON DE LUISA**

Associate Vice President, Student  
and Employee Development  
**Cambrian College**

One of the most difficult jobs you will have as a leader in any organization is terminating or laying off employees. Unfortunately, in today's work environment this is something that most leaders will have to do during their career. There are a few best practices to keep in mind to make this process run as smoothly as possible.

#### **DEMONSTRATE RESPECT**

The person being laid off is one who has given their time and effort to your organization. Although you have made the decision that they are no longer a fit in your

organization, they deserve the utmost respect. It is also always important to thank them for all they have done for the organization.

People will remember if you don't thank them.

#### **OFFER A FAIR SEVERANCE AND TERMINATION PACKAGE**

Know the labour laws and the common law practice in your industry for severance packages. If you are not aware of these laws, it is advisable to contact a labour lawyer. This legal advice upfront is often worth the cost as it can avoid future legal costs related to the layoff.

#### **HIRE AN OUTPLACEMENT CONSULTANT**

It is a good best practice to hire an outplacement consultant. This consultant will help you on the actual day of the termination as well as provide ongoing support to the person affected by the layoff and will help them in the process of preparing their next steps. The advice they provide for their next job search is invaluable and will help them both practically and emotionally during this time of change.

#### **PLAN COMMUNICATION**

It is important to develop a communication plan ahead of the date of termination, particularly when multiple layoffs are occurring on the same day. Coordination of communication is critical, although even the

best communication plan and the timing around notifications will need to be fluid. People's reactions can be unpredictable.

#### **PREPARE FOR LAYOFF DAY**

Select a location to meet with the employee that is private. This is often very emotional for the person who is being laid off and they will need their privacy respected.

The actual meeting is short and direct. It needs to be clearly communicated that the person is no longer employed at your organization and the details of the severance package are in the letter that should be provided to the employee at the meeting. This is not the time to get into the details of the reasons for the decision. However, if the decision was purely financial this can be clearly stated. Sometimes people want to debate the decision or negotiate.

This is not a negotiation—the decision is final. At this meeting any keys, company computer, phones, or company property should be collected.

#### **KEEP YOUR COMPOSURE**

Although this is a very difficult job for you, it is much more difficult for the person who is receiving the news that they are no longer employed. Your composure matters. It is important to remember that this is a pivotal moment for the person who is losing their job. How you treat them will be remembered and how you carry yourself is important.

And, as a leader, this is probably one of the most difficult things you will need to do throughout your career.

Taking these best practices into account will allow you to better plan so that this difficult day runs more smoothly. 🌱

I've always said that when you have to terminate a team member's employment due to repeated poor performance or some clear violation of rules, those are circumstances where people have generally fired themselves. Assuming expectations were clear and the proper guidance was provided, poor performers must be removed for the greater good of the organization and team. In many cases you are actually doing the terminated team member a favour—freeing them up to pursue another role that is better suited to their skills, situation, or commitment level.

When there is a labour-force reduction for cost-cutting purposes, the moral high ground is a little tougher to find—and it can be difficult for team members to accept if in their own minds they have done nothing wrong. It is, however, a leader's role to deliver this bad news and to do it in such a way that empowers the team member to move forward.

Here are four things to think about to help you to be as confident as you can be in this situation:

### **1. PLAN AHEAD**

Consider an appropriate room/location for the meeting, along with timing and other logistics, and think through the details of the conversation in advance. While these types of termination discussions rarely follow a predictable path, you can minimize your anxiety by planning and anticipating what is likely to unfold given what you know about the team member, their circumstances, and your relationship with them. You may also consider role playing what you will say and what you might get in response with an appropriately selected colleague. And it's

always handy to have tissues nearby in case of tears.

### **2. BE DIRECT**

Call it what it is. It's a decision driven by the business needs for efficiency and the team member's role is part of that corporate decision. Don't try to sugar coat the truth or talk about how hard you fought for them. A decision has been made and it's not up for debate. A termination meeting is also not the time for lengthy philosophical discussion about the direction of the company or its leadership. Stick to the mission at hand.

### **3. BE COMPASSIONATE**

While team members may have observed closed door meetings in recent weeks, and/or other cost cutting measures leading up to this, the termination may still come as a surprise. Recognize what it must feel like to be on the other side of the table and don't lose your humanity in the myriad of legal documents that you are to talk the person through. And, remember that everyone has other sources of stress in their life. Whether they are family obligations, health issues, or fear of what others may think, these are things that may compound the impact of this difficult news.

### **4. PROVIDE TOOLS**

As soon as the team member reads the subject line of their termination letter, or when they figure out that strange look in your eyes, they will stop listening. It's important

*"Our company is in cost-cutting mode and I've been told I need to lay off three people on my team, each of whom has worked here for a long time. I've never done this kind of layoff before and am feeling pretty anxious about it. How can I make sure things go as smoothly as possible in this difficult situation?"*



**TREVOR LEWINGTON**  
CEO  
**Economic Development  
Lethbridge**

that they leave the room with links to government websites, phone numbers for support services, and the detailed document that explains their severance payment or any other benefits being offered. While you should take the person through such details during your conversation, recognize that they will not really hear what you have to say and many questions will arise following the meeting, as the reality of their situation sinks in.

These conversations are never easy ones, but some thoughtful preparation will help ensure it is as smooth as possible. 🌟

## The Bottom Line:



**Be fair...** provide severance and support that helps them get back into the market.

**Focus the conversation on them...** don't dwell on hard times of the business.

**Be direct and get to the point quickly...** it's not helpful to try and soften the blow.



**Demonstrate respect...** thank them for their contributions to the organization.

**Offer a fair severance and termination package...** know the labour laws or contact a labour lawyer.

**Hire an outplacement consultant...** they can offer practical assistance to you on the day of layoff, as well as both practical and emotional assistance to the employee.

**Plan communication...** develop this ahead of the termination date.

**Prepare for layoff day...** consider location and plan for a short, clear and direct message.

**Keep your composure...** although delivering this news may be difficult for you, remember it is more difficult for the person receiving the news.



**Plan ahead...** think through the details and logistics of your conversation ahead of time, including appropriate location and timing for the meeting.

**Be direct...** don't try to sugar coat the message, simply let them know of the decision that has been made.

**Be compassionate...** remember how difficult it is to be on the receiving end of this news and maintain a level of humanity as you walk them through your message and legal documents.

**Provide tools...** prepare written documentation of severance details for them to take away and review following the meeting along with any links, phone numbers, support services that may be helpful to them.

## Chapter 3

Q

*“Our industry is facing a vast amount of change and uncertainty. What can I do to keep my team optimistic about the future, despite all of this external turbulence?”*



*These leaders share their perspective on how to keep a team optimistic in times of turbulence.*



**ELEANOR ELLIOTT**  
Director, Digital Capabilities  
**Harlequin**

Eleanor highlights the need to get very comfortable with uncertainty yourself as a leader, and emphasizes the importance of support and authenticity in inspiring the trust to lead a team through times of uncertainty. She shares her tips and strategies for how to do this.



**MARC GUAY**  
Past President  
**PepsiCo Foods Canada**

Marc highlights two different forms of change – 'controllable change' driven by internal forces and 'uncontrollable change' driven by external forces. He shares strategies and opportunities to build strength in handling both.

In today's uncertain economic and political landscape, it's natural for team members to be worried about the future, but it's important to ensure that their worry doesn't fester into pessimism and disengagement.

You won't inspire confidence in your team if you yourself are mired in pessimism, so first, you have to get comfortable with uncertainty. And I mean, really, truly! You can't fake this part.

To do this, I recommend two simple things:

1. Imagine the worst outcome. Your industry has a huge shake up, the product you are responsible for is suddenly obsolete and you lose your job. That could happen. So, what happens next? Work it out in your mind, and get comfortable with the possibility and how you'll respond. That leads us to...
2. Tell yourself that no matter what happens, you'll figure it out. You are a smart, effective leader. It's unlikely you'd be reading this article if you weren't! You have the capacity to handle any situation that comes your way. You've already worked through the worst case scenario – don't spend any more time on all the other permutations of "what if", just be confident that no matter what curveball you get thrown, you'll figure it out.

Once you get truly comfortable with uncertainty, you can effectively lead your team members.

In a 2015 study that surveyed 189,000 people across 81 organizations worldwide, McKinsey & Company determined that there are 4 leadership qualities that matter. While they are all important and worth [reading about](#),

I'm going to focus on one: **Be Supportive.**

According to McKinsey & Co, here's what this means: *"Leaders who are supportive understand and sense how other people feel. By showing authenticity and a sincere interest in those around them, they build trust and inspire and help colleagues to overcome challenges. They intervene in group work to promote organizational efficiency, allaying unwarranted fears about external threats and preventing the energy of employees from dissipating into internal conflict."*

*For your team to trust you to lead them, you must be authentic, supportive and inspire them.*

Here's how you can do this:

**Acknowledge the uncertainty.**

Whether it's in one-on-one meetings or team status, it's important that you acknowledge that things are turbulent. Pretending that everything is hunky-dory will only make you look naive and will undermine your authority as a leader. Don't be afraid to say "I don't know"! It is better to admit that you don't know exactly what's coming, than to bluster your way through, only to be proven wrong down the road.

*"Our industry is facing a vast amount of change and uncertainty. What can I do to keep my team optimistic about the future, despite all of this external turbulence?"*



**ELEANOR ELLIOTT**  
Director, Digital Capabilities  
Harlequin

**Encourage your team to focus on what is in their control.** If you're going to admit that you don't know what's coming, you have to give your team the sense that not everything is left to chance, and that's by focusing on what they CAN control. Every member of every team in every organization has some control over their work. As senior leaders, you can control how much information you gather on your industry and your strategic response. Managers can control how they'll approach and respond to problems and opportunities, and how they'll interact with peers and others in the organization. And every team member can control the efficiency, effectiveness and quality of their work.

*By focusing on what is within their control, they will spend less time worrying about what isn't.*

**Develop individual pride.** Pride is often confused with arrogance, so I don't see it discussed frequently in the workplace. That said, I believe it is a critical piece of employee satisfaction and is sorely lacking in most teams. Being results oriented is important, yes (it's another one of those 4 leadership traits from that same McKinsey & Co. study), but it can often be difficult for a team member to connect their individual accomplishment to corporate results – and it's those corporate results that often get celebrated.

*Effective leaders encourage team members to develop a sense of pride for their individual accomplishments.*

I do this in my weekly team status meeting. After team members share their highest priorities for the week ahead, they must also share something they are proud of from the previous week. Feeling proud of your individual contribution fosters a sense of meaning in your work and sharing these 'moments of pride' in a team meeting also encourages a sense of team pride – that we're all in this together, doing our best. It's a lot easier to weather a storm if you feel like you're surrounded by a great team.

## LOOKING FOR MORE RELATED READING?

**Change: Make it Your Friend, Not Your Foe**

**Welcome to the New Normal: Leading in Turbulence**

The truth is, everything is uncertain. What's that saying? Nothing can be said to be certain, except death and taxes? Rather than dwell in the negative space of "what if", encourage your team (and yourself!) to move forward with optimism.

You won't have any more control over what's to come, but you will be a lot happier along the way. 🌀

*Change has been a fact of life in business ever since businesses have been around.*

*“Our industry is facing a vast amount of change and uncertainty. What can I do to keep my team optimistic about the future, despite all of this external turbulence?”*



**MARC GUAY**  
Past President  
**PepsiCo Foods Canada**

As a matter of fact, at one of the companies where I worked for many years, we used the old adage: “The only thing we know for sure around here is that change itself is the only thing that will never change!” This helped us create a culture that embraced change, sought to take advantage of it and, ultimately, use it as a competitive tool. What is critical to understand is the inevitability of change and the notion that successful teams seek to control it and not be controlled by it. Here are a few thoughts on change, how it affects people in organizations and what leadership can do to thrive on it.

Change can come at us in two different forms: driven by internal forces, what we’ll call ‘controllable change’ and external forces, or ‘uncontrollable change’.

Neither form of change is easy to deal with. However, by definition, organizations are usually better equipped to deal with controllable change. And, being adept at leading ‘controllable change’ has the

benefit of helping to prepare teams and organizations to handle more unpredictable, complex and frightening change driven by external forces.

So, let’s start by looking at leading ‘controllable change’. Change in compensation structure is an example of controllable change that can affect everyone in the deepest, most sensitive way. Another example is a merger or the acquisition of another business causing job changes, redefinition of tasks, gaining interesting new colleagues but also losing close ones. These types of changes can cause significant disruption such as loss of focus, water cooler rumour-mongering and ultimately poison the culture of once successful organizations. Because they are internally driven, leadership can prepare the organization for these types of changes. Here are some things to consider in this regard:

**Develop and execute a well thought out plan.**

There are many great models to help leaders implement change smoothly and effectively. At PepsiCo, we used Dr. John Kotter’s 8-Step Process For Leading Change. It helped us to execute change properly and train our leaders on valuable skills to create a culture that embraced change.

**Create change when there is none.**

To keep our change leadership skills sharp, when there was little or no change happening, we created it ourselves. We made change our friend in the name of always “finding a better way to do things”, throwing out the old saying “If ain’t broken, don’t fix it!”

Then there is 'uncontrollable change'. It happens around us all the time and it varies from internal driven change in that there is very little we, as an individual or a corporation, can do to prevent it from occurring. In business, these changes can come from close-in partners, like customers or suppliers and even employees.

They can also come from more distant sources, like competitors or governments. Finally, as we all know, in recent years, the advent of new, disruptive technologies has not only brought about great changes in every aspect of life and business...but the pace at which these changes have occurred has been unprecedented in history.

Some 'uncontrollable changes' can be predicted. For example, big demographic shifts that happen over time or the advent of social media have had a profound effect on many fronts for the vast majority of Canadian organizations. One of the many responsibilities of a leader is to look around the corner, see what's coming and prepare the organization for it. This is an opportunity to bring a degree of control to those changes that might otherwise be seen as uncontrollable.

Some things to consider in this regard:

**Pay attention to trends.**

I always found it to be one of the most stimulating and challenging parts of my job to examine trends and how they would eventually impact our business. In order to do this effectively, it is important to create processes that allow you to look outside of your day-to-day affairs.

**Engage others in planning and developing strategies.**

Engage your people in the business of developing strategies for defending revenue streams or market share against any threats, and also to turn these changes into advantages to stay ahead of the competition. This not only leads to a better plan, but also ensures broad engagement and ownership, both of which are critical in having an optimistic outlook for the future.

In summary, change is never easy...whether it is controllable or not. However, as a leader, one can prepare their team(s) to thrive on and be optimistic about change. In my experience, this can be done by creating a culture that embraces change, investing in change leadership building skills across the organization and committing broad resources to strategic planning. I will close with the following thought for you and your teams: "If you don't like change, you'll like being irrelevant even less!" 🌀

*"If you don't like change, you'll like being irrelevant even less!"*

**LOOKING FOR MORE  
RELATED READING?**



**Fire Them Up! - by Carmine Gallo**

## *The Bottom Line:*



### BE AUTHENTIC AND SUPPORTIVE

Acknowledge the uncertainty.

Encourage your team to focus on what is in their control.

Share 'moments of pride' in team meetings.



### CHANGE: MAKE IT YOUR FRIEND NOT YOUR FOE

#### **Strength**

Build strength in handling 'controllable change'.

#### **Control**

Bring a degree of control to those changes that might otherwise be seen as 'uncontrollable'.

## Chapter 4

Q

*"I am considering shifting to a new industry that is very different than my current one. What advice do you have for making a successful transition?"*



*These leaders share their perspective on how to successfully transition into a new career.*



**ANITA MUELLER**

AVP, Enterprise Resource Planning **CAA**  
**South Central Ontario**

Anita, who attributes much of her success with transitions to being inquisitive, shares her tips and strategies for learning as much as possible.



**SUSAN HALLSWORTH**

Associate Vice President of Partnership  
Development and Donor Relations  
**Kids Help Phone**

Susan speaks to three phases that help us pivot our career into a new industry, and outlines her tips on how to make the most of each.

*"I am considering shifting to a new industry that is very different than my current one. What advice do you have for making a successful transition?"*



**ANITA MUELLER**

AVP, Enterprise Resource  
Planning

**CAA South Central Ontario**

You're not alone. Based on a Workopolis study back in 2014 it was suggested that only 24% of Canadians follow just one career path throughout their lifetime.

But, just because it is common, doesn't mean it's easy. Depending on how long you've been in your current role, this transition will likely be met with uncertainty and fear, but also hope and optimism for what may come. I've been in the workforce for almost 20 years and have been very fortunate to have had experiences in a variety of roles and industries. Whether changing departments, companies or even industries, I found my success by being inquisitive, trying to learn as much as I could and using my relationships to help support me along the way.

*Change can be crazy but with the right attitude and focus, it can be extremely rewarding.*

My drive for variety started right back when I was in university and participated in a co-operative program. I landed my first corporate job in the Property & Casualty insurance industry at a company that embraced cross-departmental transfers.

First I started in systems, then moved to R&D, finally I used my interpersonal skills and joined their marketing and sales team to drive revenue. All very different roles.

Then I took my next leap and moved to a new company. I stayed in the Property & Casualty industry so I had the safety of knowing the core operations, but each company has its own set of norms, values and ways to be successful.

During this transition I continued to ask myself;

- What do I enjoy about the industry I'm in?
- What are my transferrable skills and how can I demonstrate value?
- Where can I meet people and learn more?

That last point was quite big for me; growing my network and learning more. I looked within the company, and also at the industry associations and groups I could join to bring different perspectives and education to my role. It's one thing to say "hi" to new people as you see them in the hall or break rooms. It's a whole other thing to walk into a conference room or association meeting and barely know anyone there. I am a very outgoing individual and even for me it was quite intimidating. But, I forced myself to get out there.

A trick I can offer is to look around and find someone in the same situation and go together. I found that there was a sense of safety in numbers, even if just one familiar face.

Back in 2011, I switched from Property & Casualty to the Travel Insurance industry. One of the first things I did was join THIA, the Travel Health Insurance Association. There I found an incredible group of people with the same focus of improving the industry for our base consumers. I started off as a participant within the association, but within two years found myself chairing a working committee about travel insurance education.

*Volunteering your time and passion is an amazingly effective way to meet others and grow.*

While I genuinely loved the travel insurance industry and am hopeful to return to it later in my career, in 2015 I was given another opportunity to completely change roles and help lead our organization through a huge change management effort and implement a new core ERP system. Almost my entire background up until then involved insurance, but I couldn't pass up this exciting new challenge even though it was completely new for me. But, I went back to the basics. I surrounded myself in learning all about organizational change management, the technical sophistication of SAP and meeting others in the industry. After two years, I'm still reading articles, attending conferences and speaking with others to share and learn. As I reflect on the various roles in my career, my advice all boils down to the following:

- Be inquisitive
- Be open to learning new things
- Maintain a great network of people for support and guidance along the way.

This approach has enabled me to genuinely embrace whatever situation I'm in. It's helped me gain credibility through accreditations and different perspectives. But most of all, it's kept me focused on my strategic goal; to enjoy exciting new challenges, learn and continually grow in my career in whatever industry I choose. 🌟

## LOOKING FOR MORE RELATED READING?



**Pivoting Your Career Into a New Industry**

**Trumped by Ego: Lessons in Career Transition from The Donald**

**Ignore Your Mentors and Ditch the Career Plan: A Conversation with Phyllis Yaffe**

**Career Shifting: Leaping lanes mid-career.**

*"I am considering shifting to a new industry that is very different than my current one. What advice do you have for making a successful transition?"*



**SUSAN HALLSWORTH**

Associate Vice President of Partnership  
Development and Donor Relations  
**Kids Help Phone**

Good for you for considering a change. As others have said, "Change is the Heartbeat of Growth". Change can be hard but you can do it! There are several phases to pivoting into a career in another industry: Preparation, Application, and Keep Going.

### **Preparation**

The Preparation phase is really your runway before you start applying to job openings. It comprises a couple of steps – self-assessment and industry assessment and learning. These steps can take as much or as little time as you want, though, I suggest, the more time you spend self-reflecting and learning the more successful your transition will be.

*Assess who you are now, your values, your core competencies, your passions, where you want to be in the future and what will be fulfilling and meaningful to you.*

Do a self-assessment of your strengths and what you love to do. Identify the skills and experience you have and that you really want to embrace. Then do a deep dive into the industry you are thinking of moving into: Identify how your skills, experience and

passions are transferable to this industry, how is the industry evolving and what the future could look like for you.

*One of the best ways to identify how to transfer your skills to another industry is talk to others in the industry.*

Ask people in your network for introductions to have informational interviews. Then ask each one of these people for an introduction to someone else. Effectively, you are being a professional investigative networker to prepare for the next phase of transition – applying for jobs.

Try to live and breathe the industry. While reading industry publications is a good start, immersing yourself in the industry by joining or volunteering at association events to network and learn is even better. Grow your personal network by introducing yourself to industry practitioners on LinkedIn. (You may be surprised how generous people are with their insight!) These activities will help you to build your network to draw on for more informational interviews.

*Consider taking a course to gain accreditation or learn new skills.*

Through your informational interviews, identify what skills and certifications prospective employers are looking for and get to know the industry standards and lingo.

Additionally, to help build your qualifications and/or differentiate you from other candidates, you may want to consider taking a course to gain accreditation or learn new skills. Sometimes the courses that are best in class for the industry are not open to non-practitioners. In this case, consider asking someone in your network who has taken the program if you can read their course materials.

Continue to assess yourself and be confident that this is what you want to pursue. As you build your resume to apply for jobs in this field, work to highlight your relevant skills and experience. During some of your networking meetings, you may want to consider asking for feedback on your resume to help you prepare for applications. You may also want to ask about any interview questions that you should be prepared for.

From those industry practitioners you meet with, consider building an informal personal board of advisors. As you network and apply for roles, these people can have an important insight such as background on the hiring manager and what success looks like for the role, knowledge of the organization's culture, etc.

### **Application**

As you apply for jobs in the industry, think about how to demonstrate your transferable skills and experience as well as your knowledge of the sector. Customize your cover letter and resume to highlight relevant successes and indicate how they are applicable to this opportunity. When you have an in person interview, consider proactively preparing a presentation to demonstrate the thinking that you will bring to the role.

### **Keep Going**

Congratulations! You have successfully secured a role in the new sector. Don't stop your hard work of personal growth! Keep going by pursuing certifications which will help you to continue to learn and succeed in the industry. Invest in memberships and volunteer your time to support the industry and others. Go back to your personal board of advisors and your network to say thank you and share your learnings. These informal team members may be seeking your thoughts soon. 🌟



## **LOOKING FOR MORE RELATED READING?**

**Do Over: Make Today the First Day of  
Your New Career by Jon Acuff**

**What's Next – By: Barbara Moses**

## The Bottom Line:



### FOCUS ON LEARNING & GROWING

- Be inquisitive. Try to learn as much as you can, using your relationships to support you along the way.
- Be open to learning new things. Look within the company, and also at joining industry associations and/or groups to bring different perspectives and education.
- Maintain a great network of people for support and guidance along the way.



### THREE STEPS TO PIVOT INTO A NEW CAREER

1. **Prepare.** This is your runway before you start applying to job openings. The more time you can invest here, the better.
2. **Apply.** This is your opportunity to demonstrate your transferrable skills and experience, as well as your knowledge of the industry. Look for opportunities to highlight relevant experiences in your resume and cover letters.
3. **Keep Going.** Once you have secured your role in a new industry, don't stop your hard work for personal growth. Consider memberships and volunteer opportunities in the industry.

## Chapter 5

Q

*"I work in a fast, paced, demanding work environment where the sensitivity for "life balance" is low. The expectation is that the demands of the business will always come first. How can I make space for my personal priorities without it seeming that I am not committed to the business?"*



*These leaders share their perspective on how to achieve life balance while still demonstrating commitment to your work.*



**AMY LASKI**

Founder and President

**Felicity [Inspiring Communications]**

Amy speaks in terms of "work-life integration" rather than "work-life balance", pointing out that with the evolution of technology, work will inevitably creep into our personal life and vice versa. Suggesting that GUILT often impedes us from establishing a standard of work-life integration, she shares opportunities to assess and quieten the guilt.



**JULIE THOMPSON**

Director Program Management and  
Compliance

**Plan Canada**

Julie points out that balance is unique to each of us, and is a work in progress that may bring different needs at different stages of our lives. She shares some of the strategies she's taken to tip her balance scale.

*"I work in a fast, paced, demanding work environment where the sensitivity for "life balance" is low. The expectation is that the demands of the business will always come first. How can I make space for my personal priorities without it seeming that I am not committed to the business?"*



**AMY LASKI**  
 Founder and President  
**Felicity [Inspiring  
 Communications]**

When Glain and her team asked me to share my thoughts on this question, my initial response was, "I'll do my best, however, my personal experience when my work-life balance was off kilter was to strike out on my own! And, I've built my organization on the foundation of balance."

Upon further reflection, I realized that the factors that led me to found my own company combine to create a powerful lens that can be applied by others. To me, "balance" is both delicate and binary: you are either in balance, or you aren't.

*Life by its very nature defies balance. That's why I prefer the term "work-life integration."*

I've built my company on this foundation. At Felicity we haven't simply accepted that work is inevitably creeping into our personal lives (and vice versa). We embrace it wholeheartedly.

We use technology and a mindset that enables around-the-clock connectedness. This can be both a blessing, and a curse. This more seamless integration allows you to work where and when you are most productive, or bigger picture, take care of an elderly relative or new baby without missing a career beat.

However, to truly achieve "work-life integration," you need more than internet access. Dig deeper. What is underpinning the feeling that it is lacking?

In my experience, **GUILT** is a major driver of feeling like work is paramount. Guilt that you ought to put in overtime to show you are eager to advance, take on extra projects to stretch your capabilities and add transferrable skills to your resume. You should. So you do. Examining the real and potential sources of your guilt will help empower you to set the standard for your work-life integration.

Consider these three sources of guilt:

1. **Organizational:** The workplace's norms and expectations can be set up as an ideal "breeding ground" for guilt. For instance, in the corporation where I worked, meetings were called early in the morning and began late in the day, often at the last minute, without regard to outside obligations. If you're in a similar situation, the more people that are involved in the organization and its many, many meetings, the more difficult it can be to shift the boundaries.
2. **Managerial:** An organization's leaders can lay on guilt thicker than even my mother can. For me, I knew I was going to be working for someone who placed a strong emphasis on face time, on perceived input versus actual output and results. Sound familiar?

3. **Self:** An organization's culture or leaders may be the ones who dictate norms around the acceptance of balance, but ultimately the onus rests on your ability to set boundaries. The pull of technology and pavlovian reaction to the "ding" of an email is so strong it takes willpower and our own good habit-forming to resist. While I was uncertain if my new leader would impose her personal expectations on me, one thing I did know was that there was a high probability that it would be difficult for me not to feel guilty, even if that guilt came from within.

Once you've identified the sources of guilt, examine their relative strength and determine what you can do to quiet internal guilt and manage external sources. Consider building in personal time at lunch, set weekly meetings with your boss to ensure regular face time and updates, and be prepared to say no.

*Identify the sources of guilt, examine their relative strength and determine what you can do to quiet internal guilt and manage external sources.*

For me, this process led me to approach my boss with a flexible work arrangement proposal. The best case scenario would be: set boundaries and the space I sought for personal priorities. But going into the conversation I also knew my BATNA: Best

Alternative to a Negotiated Agreement, which in classic negotiation theory means, "the most advantageous alternative course of action a party can take if negotiations fail and an agreement cannot be reached."

For me, it came down to either a more flexible arrangement in my current organization, or my BATNA, leaving the organization for one that would enable more flexibility. Determine your BATNA before having this conversation.

In the end, the response was that while the organization hoped I would continue working there, my role required a full-time commitment that could not accommodate the flexibility I was looking for. I suppose that's where the saying "when one door closes, another opens" is fitting, as without this pivotal moment, I would not have founded my company. Our virtual, flexible model fills a void in the marketplace that I experienced as a client at the large, inflexible organization.

Certainly, I still experience guilt on a daily basis as a business owner, mother, daughter and spouse. But, I have gotten much better at applying these three "guilt lenses" to identify whether it is self-inflicted or external, then managing the situation accordingly. You can too! 🌸

## LOOKING FOR MORE RELATED READING?



[Striking Balance in Today's World of Work](#)

[Schools of Thought on Making Work-Life Balance a Priority of Your Business](#)

[4 Tips to Streamline Your Work with Your Life](#)

*"I work in a fast, paced, demanding work environment where the sensitivity for "life balance" is low. The expectation is that the demands of the business will always come first. How can I make space for my personal priorities without it seeming that I am not committed to the business?"*



**JULIE THOMPSON**  
 Director Program  
 Management and Compliance  
 Plan Canada

I have spent the last 15 years working in the non-profit sector, specifically international development where I am drawn to the missions that these organizations serve. While this is work that I am very passionate about and that brings much reward, it also comes with some sacrifice. Compensation is typically less competitive, and the context and complexities of our work and its demands, in some cases, can make life balance very challenging.

In my current role at Plan Canada, my work cuts across different regions, including Latin America and Asia. This essentially has me working on a 24 hour clock. Our project implementation is in some of the most vulnerable and marginalized areas in these regions that are prone to natural disasters, humanitarian crises and conflict thus making it very difficult to 'turn off' or ignore the little red light that is flashing on my phone, regardless of the time of day or night. My job also requires a lot of international travel at times, which is by no means glamorous. The travel and time zone changes are not easy, the days are long, busy and require lots of prep, and evenings require time to keep up with the demands that continue back at the office. Staying healthy and balanced in this role and environment is definitely a challenge!

While I don't always claim to be just where I want to be as it relates to balance, I see this as a work in progress and have certainly realized the gain in taking some small steps. Here are some of the strategies that I've employed to tip my balance scale.

**Prioritize** – Sometimes you just need to accept that you can't do everything. It's important to recognize what's urgent and what's not, and we all need to determine our own criteria for this. In my case, priorities include anything that may impede other things from moving forward, things that are external facing including donor requests, and executive team requests.

**Delegate** – I have learned that I can't, and perhaps shouldn't, do it all. Early in my career when I wanted to prove myself, I did feel that I had to do it all. Now I see delegating as a good opportunity for others to grow and learn - as long as it's done well. I think there's lots of value to building and equipping others to take things on for you. As part of my effort in delegating, I try to ensure clarity around expectations, keep communication high through regular update meetings, and I provide team members with similar criteria for prioritizing their work and what they cover with me in their update meetings.

**Work From Home** – Working from home on occasion was something that I was hesitant to ask about at first, but that has provided me with great flexibility to get some personal things done during my work day or early evening avoiding the commute; whether it be an appointment, laundry or a class. In my case, my boss had set the tone for flexibility, working from home herself on occasion. This did help me feel it was ok to ask, but I certainly viewed and continue to view this as a privilege and I always respect it.

Building trust early on and then maintaining it has been key in making this flexible arrangement work for me. High communication, being available and responding quickly, being proactive and transparent about when I am not available and why, have all been helpful in building and maintaining the trust around this arrangement. With my teammates, I try to be respectful of their preferences for face-to-face meetings and accommodate those. And, I check in regularly to ensure that my boss continues to be comfortable with how things are working and make any necessary adjustments.

*High communication, being available and responding quickly, being proactive and transparent about when I am not available and why, have all been helpful in building and maintaining the trust around my flexible arrangement.*

**Take Vacation** – For a long time I was not always particularly good about taking vacation time, though I was always good at making sure that others around me did. Over time I discovered the importance of me taking vacation too. I've discovered how it allows me to recharge and regain perspective; to be more strategic in my thinking; and that it sets the tone for my team as to the importance of vacation and taking time for one to recharge and come back fresh and recommitted.

#### **Schedule Time for Me**

– Whether it is a run, a yoga class, or walking the dog, scheduling time for these types of things in the same way that I schedule a meeting helps me see it much more like a commitment. I put all of these things into my calendar and protect that time, which for me has proven to be the only way that it works.

*Scheduling time for personal things in the same way that you schedule a meeting.*

#### **Step Away From My Work Environment**

– Whether I am at my home office, my corporate office or my hotel office, a short break away from the environment I'm working in can help me and my day feel so much more balanced. It may be taking a walk, going to the gym, going to the coffee shop or the park with a book, or getting out for a meal with a colleague when I'm travelling. It doesn't need to be for long to make a difference. When I am unable to

## LOOKING FOR MORE RELATED READING?



**The Miracle Morning: The Not-So-Obvious Secret Guaranteed to Transform Your Life (Before 8AM) – By Hal Elrod**

**The Five Minute Journal - By: Alex Ikonn and UJ Ramdas**

physically step away, taking a few minutes to listen to some music to get me grounded or energized again usually does the trick!

*Small steps can become better habits and create big gains!*

How balance is defined is very personal. It may not be the same for me, as it is for you. And what I define as good balance for myself now may be different than what I define as good balance at a different stage in my life. We all need to consider how we can achieve the balance that works for us, and sometimes small steps become better habits and can create big gains! 🌀

## The Bottom Line:



### EXAMINE YOUR SOURCES OF GUILT

Guilt is often a key driver that impedes work-life integration. Consider these three sources, their relative strength and what you can do to manage them:

1. **Organizational:** The workplace's norms and expectations can be set up as an ideal "breeding ground" for guilt.
2. **Managerial:** An organization's leaders can lay on guilt thicker than even my mother can.
3. **Self:** An organization's culture or leaders may be the ones who dictate norms around the acceptance of balance, but ultimately the onus rests on your ability to set boundaries.



### STRATEGIES TO TIP THE BALANCE SCALE

- Prioritize
- Delegate
- Work From Home (If possible)
- Take Vacation
- Schedule Time for You
- Step Away From My Work Environment

We hope you've enjoyed Volume 2 of Mentoring Matters.

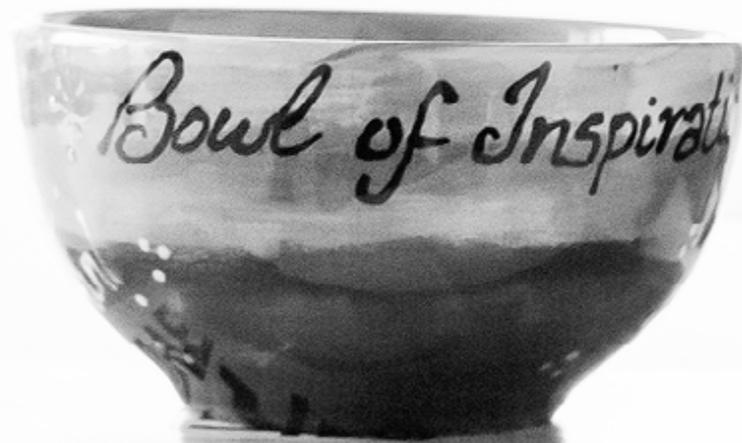
Our next issue of lessons learned will be available in early 2018.

If you have a question that you would like to ask our Roundtable Mentors or would like to participate as a Mentor, please email [info@goroundtable.com](mailto:info@goroundtable.com) and write Mentoring Matters in your subject line.

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