HOW TO STOP THE REVOLVING DOOR

5 Strategies that will positively impact your employees and business results

Mike Mack, MBA and Kris Schinke, MBA

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Here's What's Inside…

Introduction

Over the last number of years, with conversations around challenges like The Great Resignation, Quiet Quitting, etc., it's our philosophy that if the culture was good before, the retention of that organization is likely to remain reasonably strong. It's an ongoing topic of conversation because employee turnover can cost an organization thousands of dollars. The premise of this book is to address what some organizations do well for their culture and what others may need to learn.

At X5 Management, we have the privilege of working in various industries. We are trying to capture successes for all the leaders who may not even realize they have a problem, even if their retention is reasonably good within the organization.

A lot of organizations ride the wave when times are good. When they need to be more proactive, it's a much bigger chore because now they have to dig deep and implement initiatives. In a hiring crisis,

for example, momentum is lost when the level of coverage for customers or support departments does not exist. Those are all avoidable things if organizations look at *stopping the revolving door*, not letting it get to that point where it may be spinning out of control. Employee retention is key to an organization's success.

It is a Catch-22 to measure the costs of the Revolving Door because it happens quickly when in a short-staffing situation, creating a big workload for the existing employees and putting them under pressure. That has a negative impact on culture. Unfortunately, these pressures soon impact customer service and sales, along with morale.

We don't know if we could put an exact cost on it because it depends on the industry and the organization's size, but it is substantial. By far, it is more costly than retaining *already trained* existing employees.

It eventually becomes a snowball effect; think of it as a spiraling culture where the impact of attracting people becomes a challenge. The cost is significant, and the risk to the company's reputation is high, as is the risk of losing existing employees. This is

important because the investment in onboarding and training is a significant upfront cost.

While the average cost-per-hire is $4,425 according to the Society for Human Resource Management (SHRM), the average cost of onboarding new hires is slightly more nuanced. It is estimated that the hours managers spend training their employees costs companies an average of $1,252 per hire, while onboarding paperwork is said to swallow up 10 hours of HR time. Onboarding includes induction, training, and welcome kits.

Beyond the hours spent bringing a new employee onto the team, it's also worth noting the time that it will take for the new arrival to settle into their new role. The average time for new hires to reach full productivity ranges from 8 - 26 weeks, or longer, which could potentially impact your team's output or lead to a decrease in earnings.

> *"Continued focus on employee turnover is of critical importance, because of the direct relation of turnover to improvements in labour costs and guest satisfaction".*
> *— Peter Dunn*

So why are they leaving?

When a plan does not exist, or is not formalized, organizations are not prepared for turnover, and they likely cannot prevent it either. A plan that outlines what an ideal organizational chart should look like in the near future (i.e., one or two years) and the more distant future (i.e., three to five years), is the first step in the strategic people planning process.

That "people plan" should include a succession plan based on the current employee group so that training and/or hiring needs can be identified. If organizational growth is anticipated, the people's preparedness for new roles is critical. This people planning and preparedness will have an exciting impact on the internal teams.

It is difficult to recoup your onboarding and training costs if employee turnover is high. So, all you get for your trouble is a team that isn't performing and a laundry list of costs:

- Financial costs.

- Reputation cost.

- Culture cost.

This adds to poor customer service and has a negative impact on your sales.

But it doesn't have to be that way.

That's our passion behind writing this book. Those organizations that do a great job of *Stopping the Revolving Door* are ahead of the curve and ahead of the Return on Investment (ROI) within their respective industries.

We hope that whoever reads our book has valuable takeaways and insights.

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

Chapter One
Strategic Planning Comes First

Most organizations envision a better future with more revenue and retained clients and staff. But few invest the time to plan out "how" they will achieve a better future.

> *A goal without a plan is just a wish*
> *— Antoine de Saint-Exupery*

That's why now, more than ever, there's a need for strategic planning in business. In this chapter, we will tell you what strategic planning does for a business and the steps to follow for building your strategic plan.

What Can Strategic Planning Do for a Business?

In today's world of sudden and significant change, the endless race towards innovation, along with the need for nimbleness, leaves many organizations struggling with daily tasks.

Work becomes scattered, unfocused, and reactive, as opposed to enacting strategic planning, which would allow time for being proactive. Everything is a priority, and therefore nothing is a priority!

John Doerr, the recognized guru of Objectives and Key Results, and author of *Measure What Matters,* points out that setting goals that align with your ambitions, passion and purpose sets a compelling sense of "why."

This is where a strategic planning session can help you focus on your WHY.

Doing this will inspire and motivate your teams to create those difficult but achievable goals and ideally engage your team which can positively impact retention.

Progress Doesn't Happen Overnight

It is ideal to prepare for a strategic planning session with your senior leadership team. These sessions may take place over one or two days.

One effective way we found while setting up these sessions for our clients is utilizing a facilitator to ensure the planning session stays on track. This

facilitator will allow the business leaders to participate rather than be distracted by running a meeting.

A persistent set of challenges we see many organizations struggling with:

- Organizations rarely take the time to collaborate with their team.

- There's no formal or informal way to get input from all organization members.

- There's no way to consistently and in a timely manner share important information amongst their teams.

The beauty of strategic planning, when done consciously, is:

- It should represent an opportunity to discuss current issues.

- Give time to reflect on successes and challenges.

- And ensure every member of your team is well-informed and aware of the future plans for the organization.

Five Strategic Planning Tips:

1. <u>Get off-site</u> – this allows your team to avoid distractions and spend quality, focused time together.

2. <u>Stick to key themes</u> – there are always many challenges and key areas to discuss during any planning meeting. Pick two or three key areas depending on the timeframe and closely follow the time allowance on the agenda.

3. <u>Get input from everyone</u> – spending too much time presenting during a strategic planning session is easy. However, making time to get team members' input is equally as important. Carve time for questions after every presentation and make sessions interactive. Sometimes you can obtain input from team members in advance, even if they don't actually attend the planning session.

4. <u>Break the silence</u> – take time for breakout sessions – small group discussions and activities. This allows everyone in attendance to be involved. Have activities start with small group discussions. This is the perfect time to bring to the attention of

all participants the group highlights from the recently completed activity.

5. <u>Narrow the priority list</u> – action items are a significant final step in any strategic planning session. However, if this list is too daunting, many items may fail to materialize. Select your critical few items and set timelines for execution.

Once the planning session is concluded, work with a facilitator to set an execution plan that brings the discipline you need to move those ideas forward.

Follow-up sessions are recommended with your team throughout the year, where your facilitator is an accountability partner to ensure you stay on track. This is a critical part of organizing the priorities of your business.

At the end of the day setting big goals—is just a dream—until you have strategic planning in place for the steps needed, the people involved and the deadlines in writing.

Key Steps for Building a Robust Strategic Plan

What strategic planning does (or doesn't do) for a business largely depends on the steps you follow while building your plan.

Here are some key steps that we focus on to help you build a robust strategic plan:

- First, schedule a meeting with your Executive Team and a qualified facilitator. That way, we can better understand your current challenges and concerns and where you want to take your business. The advantage of a facilitator is they can manage the process objectively and do so without emotion. A facilitator allows the leadership team to participate fully in the strategic planning.

- Utilizing the services of a facilitator, data can be collected from clients, employees, and suppliers on how they see your business. This helps you better understand how your stakeholders perceive you— what's going well, where the blind spots are, and what opportunities you might miss.

- Once the data is collated and with the facilitation process, your strategic priorities will be focused on what will move the dial. It could be a new product/service development, expanding your territory, or improving efficiencies.

We also suggest you look to answer **four key questions**:

1. What are we doing well? Keep doing it.

2. What are we not doing well? Improve it.

3. What are we not doing that we should be doing? Action it.

4. What are we doing that we should not be doing? Stop doing it.

SMART Goal Setting

The most important element of your strategic plan is execution. Utilizing the SMART goal setting framework is recommended:

- Specific

- Measurable

- Achievable

- Realistic

- Time sensitive

You should get laser-focused on who is leading the priority along with what metrics will indicate success, when, and what additional human or financial resources are necessary.

> *"When you fail to plan, you plan to fail"*
> *— Benjamin Franklin*

You have done strategic plans before. Somehow, they seem to sit on a shelf and gather dust. Maybe 20% to 30% is ever acted on, but generally, your teams revert to "same old-same old" in the busyness of their work. And again, another year goes by with all those great ideas generated in your planning sessions never coming to fruition.

It's essential to recognize the importance of the five strategic planning tips we discussed earlier:

1. Get off-site.

2. Stick to key themes.

3. Get input from everyone.

4. Break the silence.

5. Narrow the priority list.

Recognizing these planning tips will help you escape the inaction that always comes between making the plan and the execution of the plan. We have found for our clients that this is the easiest way to avoid the missteps and pitfalls of bringing your plan to its full potential.

Some interesting and surprising statistics are emerging on the efficacy of strategic planning.

- According to Cascade Research, 67% of leaders believe their organization is good at crafting strategy, but only 47% believe their organization is good at implementing strategy.

- Harvard Business Magazine (HBR) researchers have conducted multi-year studies on why strategy execution unravels. Their research reveals that several beliefs about strategy implementation we think to be true are not.

> *Organizations need more than a strategic plan; they need a strategic execution plan.*

In the chapters to come, we will highlight what the research is revealing and offer proven strategies for companies to get their strategic plans off the shelf and deliver expected and exceptional results.

Take comfort; You're Not Alone

A recent survey of more than 400 global CEOs found that executional excellence was the number one challenge facing corporate leaders. This finding held true across Asia, Europe, and the United States – ahead of innovation and top-line growth – and that two-thirds to three-quarters of large organizations struggle to implement their strategies.

Issue #1 – It's More Than Alignment It's Coordination.

The question "can I count on you" depends on who "you" is.

According to Harvard's research, reliability was strong up and down the chain of command hierarchy – 84% for both bosses and direct reports – but people in other units were not considered reliable (colleagues in other departments: 59%, external partners: 56%).

In Harvard's survey, when managers were asked to identify the single greatest challenge to executing their company's strategy, 30% cited failure to coordinate across units. They were three times more likely to miss performance commitments because of insufficient support from other units rather than their own teams' failure to deliver.

> *How are your departments coordinating their roles in executing your plan?*

Issue #2 – The Roadmap isn't a Straight Line

After investing time, money, and energy into formulating a plan and its associated budget, you

may view it only through a myopic lens that allows no deviation or adaptation.

Such divergence would be considered a lack of discipline or undermining of the plan. But the very definition of strategy execution is to seize opportunities that support the strategy while coordinating with other parts of the organization on an ongoing basis.

According to the Harvard survey, when market trends shift, most organizations either react too slowly to seize fleeting opportunities, mitigate emerging threats (29%), or react too quickly and lose sight of company strategy (24%).

> *Are you responsive or reactive to market shifts?*

Issue #3 – Communication ≠ Understanding

Once a strategic plan has been crafted, what happens next? Traditionally, your Communications department, or personnel responsible for communication, will likely look to roll out a robust communications plan.

But does communication equal understanding?

When a management team was asked through the Harvard survey to describe the organization's strategy in their own words, and to list the top five strategic priorities, less than one-third could name even two. Not surprisingly, this is a common response.

In other surveys conducted by the Harvard research team, only 55% of middle managers could name even one of their company's top five priorities. Even when they could, <u>managers did not clearly understand</u> how major priorities and initiatives fit together.

How rampant is this disconnect?

Less than one-third of senior executives' direct reports clearly understood the connections between corporate priorities. Even more discouraging, that figure plummeted to 16% for frontline supervisors and team leaders.

Emails and constant meetings to "drive home" the strategic priorities do not work unless middle management and front-line employees can articulate, in their own words, the strategic priorities and how they impact the desired results.

> *Does your team describe your strategic priorities?*

Issue #4 – Who Drives the Strategic Execution Bus?

What's the problem with you and your executive team driving the bus of executing the strategy?

You diminish the organization's capacity to execute over the long run. This will automatically increase the risk of the execution unravelling should one of your executive team members depart.

Moreover, if your top executives insist on making important calls themselves, they undermine middle managers' decision-making skills, initiative, and ownership of results.

"Distributed" leaders, i.e., middle managers and supervisors, are the "face" of your company to most employees, partners, and customers, and they are the ones who should be driving the strategic and operational execution "bus." But in doing so, they need to be nurtured, supported, and guided from the top.

Unfortunately, this is often not the case.

Distributed leaders are often constrained in their efforts to translate overall company strategy into meaningful terms their teams or units can get behind. A question that might be posed to all staff in the organization is, "who owns the burden of success?" The answer? Everyone!

> *Does your team believe they own the burden of success?*

Issue #5 – Does a Performance Culture = Execution Success?

When strategy execution fails to translate into results, a weak performance culture is an easy scapegoat.

In the Harvard study, two-thirds of all managers surveyed named past performance as the most frequently named factor in promotion decisions. It also ranked among the top three influences on who gets hired. One-third of managers believe that performance is also recognized most of the time with nonfinancial rewards, such as private praise, public acknowledgment, and access to training opportunities. This is key to employee retention as well.

So, if companies have a strong performance culture, why are they struggling to execute strategy?

The answer is that too much emphasis is based on performance. More value is focused on a manager's ability to hit their numbers and much less on their ability to adapt to changing circumstances, indicating the agility needed to execute strategy.

50% of managers surveyed believe their careers would suffer if they pursued (but failed) at novel opportunities or innovations.

Fewer than one-third of managers say they can have open and honest discussions about the most difficult issues, while one-third say many important issues are considered taboo.

Creating a strategic plan is challenging enough, but gaining alignment through buy-in from the team, and then effectively executing the plan is the bigger challenge. We recently worked with a leadership team who were satisfied they had a plan but were so focused on the end results they did not effectively align the organization for an effective

execution. Because of the push for performance, the team became too competitive, dysfunctional, and that had a negative effect on profitability as external stakeholders shied away. Had they been involved and aligned, their team execution could have been more successful, allowing them to focus on strengths and address opportunities.

Now What?

Now that we have identified the barriers facing strategy execution, let's look at ways you can overcome these issues and deliver on your plan.

Solution #1 – Check-ins

It is typical and expected that organizations "check-in" on the progress of their strategic plan.

But who is at the check-in table?

To address any alignment missteps (Issue #1), why not consider only having middle managers, supervisors, and relevant external stakeholders come together for check-in with each other?

This allows those responsible for the execution of the plan to address and overcome whatever

insufficient support is cropping up that impacts the delivery of results.

Certainly, senior executives need to be informed as to the progress of the plan, but not overtake it.

This also addresses Issue #4, Who Drives the Strategic Bus, where the "burden of success" rests with distributed leaders and their teams.

> *If you want your leaders to own the plan, they need authority with responsibility.*

Solution #2 – Finger on the Pulse

Innovation is not a department; it is a mindset. Everyone in the organization needs to be attuned to shifts in technology, markets, or regulations that may impact what might have otherwise been a wise strategic initiative.

If circumstances change (Issue #2), the company needs to address and embrace whatever adaptation is required, and the messaging from the top needs to reflect this tolerance for new ideas.

If emphasis stays focused on hitting numbers, fear of agility or adaptability will cause managers to

hold back on possible solutions to unforeseen shifts in the business.

A myopic focus that eliminates adaptation may cause the strategic plan to fail.

At X5 Management, we have always emphasized the need for flexibility, and recommend a strategic plan is revisited on a consistent basis so adjustments can be made to the plan. During one of our strategic planning sessions, we asked the executive team when they last did strategic planning. They responded only one-year earlier, and when we reviewed that plan with them, they told us nothing had been actioned. Why? Because the plan was long and extremely detailed and included thirty-plus action steps. It was too daunting for anyone in the organization, and it could have taken many hours to adjust when internal or external factors changed, so the plan was never addressed.

> *Coach your teams to be proactive and responsive instead of reactive or non-responsive when it comes to those unforeseen shifts.*

Solution #3 – I Get It!

Here's an interesting idea. Once the strategic plan has been rolled out and communicated throughout the organization, ask employees to articulate in their own words what their specific action item will be that advances a strategic goal and what it means to them (Issue #3).

This will demonstrate if the communication plan has worked, and your senior executives will know quickly if front line employees know, understand, and embrace the plan. If this is not the case, you will need to figure out how the company can improve the message, so they know, understand, and embrace the plan.

The outcome of strategic planning ensures the organization clearly understands its goals, vision, mission, and values, as well as planned short-term and long-term objectives.

This framework will guide decision-making and the allocation of resources. Ultimately, this roadmap will have a positive impact on making informed choices about new opportunities and potential risks.

Overall, performance will be enhanced, leading toward learning to better the company's profitability.

Chapter Two

Strategy One — Communication

As we learned from leadership guru and best-selling author John C. Maxwell, "Connecting is all about others."

Maxwell stated in his book, *Everyone Communicates – Few Connect*, "When trying to connect with people, it's not about you – it's about them. If you want to connect with others, you must get over yourself."

> *"Connecting is the ability to identify with people and relate to them in a way that increases your influence," says Maxwell*

Three questions people are asking about you, according to John C. Maxwell:

1. Do you care for me?

2. Can you help me?

3. Can I trust you?

These points can play an important role in the pursuit of employee morale and engagement. Employees want to feel valued by leadership; the result is a better sense of motivation and appreciation. Leadership can easily do some little things that help connect them with their teams, and that make a big difference in making team members feel important.

Communicating firsthand with employees by "managing by walking around" is an old technique (author Tom Peters) that suggests management spend impromptu time listening to employees and observing behaviors. This encourages two-way communication versus the one-way or top-down communication email and memos accomplish.

Creating a culture of closed-door meetings should be evaluated; that usually disengages even those that participate, and many find excessive meetings draining.

> *"Communication is everyone's panacea for everything".*
> *—Tom Peters, author*

Why is Communication Important?

In the context of business, the cost of a poor culture of communication can be steep. A poor culture of communication leads to conflict, inefficiency, dissatisfaction, and more; both internally (employees) and externally (customers and suppliers). Ultimately this harms an organization's reputation, and bottom line. It can also have a negative impact on employee retention.

An informed understanding of different communication styles empowers employees when interacting with not only each other, but more importantly, with customers as well. A positive culture of communication means employees have the skills and experience to make the most of any relationship or event, regardless of whether it is good or bad. This maximizes the benefits from the interactions that make up the everyday functioning of a business.

Organizations who are considering an internal communication strategy can consider asking their internal stakeholders what is currently going well, and what can be done differently. In the spirit of communication, this strategy should not be top-down since buy-in and participation will not be

optimal if at least some employees are not involved.

Strategy considerations:

- Frequency of messages, meetings, events, and other forms of communication, such as newsletters or announcements

- Types of communication, using all available platforms to appeal to the generational demographics, including two-way feedback mechanisms

- Commitment to consistency of each channel

- Quality, acceptable language of content and expected turn around times

- How priority or emergency communication is shared

- Communications training workshops at all levels within the organization

A study by Arthur J. Gallagher and Co. found that 60% of companies don't have a long-term internal communication strategy in place.

Before People Leave

The obvious sign that something is wrong with your organization is that people start leaving. We get a sense of the vibe in a company when we have the privilege and opportunity of doing some coaching support, or training. Whether we're going in for one day a week or ten days a quarter, we must listen.

We call it water cooler talk, but it really runs much deeper than that. We must understand the tone and people's thoughts.

- Are they frustrated with the economy?

- Are they frustrated with the organization?

- Are they frustrated with people, the culture, and the communication?

- Are they frustrated with their manager?

You must do a great job as a leader to listen to that well in advance before it becomes a major retention issue. More importantly, you're going to have to do something about the concerns you're hearing. It's one thing to listen, and it's another thing entirely to do something about it.

Shocking, Isn't It?

Most companies are shocked when they hear what their teams are concerned about. Don't turn a blind eye!

You've got to focus on their concerns and figure out how to come up with a solution. Even if you don't think it's an urgent problem to be solved immediately, believe us when we say, it soon will be.

If it's not addressed and remedied, it can cost the company a lot of money, time and energy. Losing one person is one thing, but you could lose a team of five in one department, particularly if the competition's aggressive and they're willing to pay a little more.

That's the sad part. People often leave for a small pay increase with another company because they're unhappy in their current situation. They didn't leave for the money. They left because they weren't happy and just happened to get a little more pay somewhere else. If they had been satisfied with their current employment, they wouldn't have been looking in the first place.

Checking the Pulse of Your Workforce

It's so important for leadership to stay in touch with their workforce. If they go into a strategic planning situation without having their finger on the pulse, focusing on the big picture won't matter because they'll still miss some of the issues they have in the ranks.

One of the things we see that is incredibly common is people feel overwhelmed because they're so busy.

The problem is they don't stop to look and figure out:

- Am I busy because I don't manage my time?

- Am I busy because the workload is unreasonable?

- Am I busy because I lack the training to delegate and teach (or develop others) to share the workload for their own training and development?

Here's the thing. At the end of the day, it all boils down to planning. We challenge people because we frequently hear, "I'm so busy."

The good news is that problem belongs in strategic planning, too. How does the company best support their workforce so employees continue to grow, develop, and contribute, but at the same time, not get overwhelmed and have one foot out the door?

Communicating with internal customers

Your company's internal customers are as important as its external ones. What exactly do we mean by internal customers? These internal customers are your employees, stakeholders, business partners, etc.

All these people require and deserve the same culture of positive communication as your external customers. Your company's communication culture, internal and external, determines how effective it is at selling the best products and services at the lowest costs.

The Cost of a Poor Culture of Communication

A poor communication culture leads to conflict, inefficiency, dissatisfaction, and more, both internally and externally, and ultimately harms your long-term reputation and bottom line.

An informed understanding of different communication and conflict styles will empower your employees when interacting with each other and your customers and dealing with conflict when it inevitably arises.

A positive communication culture means that your employees have the skills and experience to make the most of any relationship or event, no matter how good or bad, which maximizes the benefits from the frequent interactions that make up the everyday functioning of your business.

Avoiding Organizational Bottlenecks

It is relatively common as an organization grows to see bottlenecks develop. The problem is they tend to get worse because they add to the bottlenecks already in place. It all boils down to leadership not being as connected as they could be.

As John Maxwell writes, "everyone communicates, few connect" when communication is strictly top-down. It's a matter of ensuring all the communication platforms are covered.

You must appeal to different generational groups and levels within the organization, as well as make

sure that that communication is understood. A top-down message is not typically very effective. Organizations do need to think a little bit about what their communication strategy is or if they even have one. If they don't, they would be wise to create something because organizations that communicate internally are more likely to be successful. After all, the entire workforce needs to be on the same page. It's also going to require you to speak and get in front of employees. It's listening to employees, and training is a big piece of listening.

Remember, communication doesn't come easily to everyone, and it's one of the hardest skills to learn. It should be a skill that organizations invest in because it'll serve them very well.

Bottleneck Symptoms

We hear from employees in our training or coaching that they would like more information. They are not always aware of the organization's strategy and objectives that they, as employees, can contribute to. Typically, employees want more information, period; it's as simple as that.

With some of the training and coaching we do and the associated assessments, we have a fairly good idea of what we can address in our training and still provide feedback for the leadership group.

One of the statements we reference a lot is "**leave nothing to chance**." We didn't coin it, but it's become a guiding principle for us. If you communicate instructions or an update within the organization, leave nothing to chance.

Did everyone get this message? Chances are you will probably need to communicate it more than once because you might miss someone, or it was lost in an email. Communication is the most sought-after inquiry and we get clients saying, "We need help with communication." That's a very broad statement. With that comes a need to discover a new perspective client and then drill down to find out what the issues are with communication.

Lots of organizations are pretty good at communication. It's an evolution, though. You can never stop focusing on it and say, "We're too good at communication." That scenario does not exist because as soon as you add one new layer, such as a new employee, or expand a department, you get

busier. What happens is you get so busy that you don't think as much about communicating to others. You've just got your head down doing the work, and don't stop long enough to make sure that everyone is in the loop.

Everyone becomes too busy and won't take the time to communicate it forward, up, down, or sideways or even back to the customer, whatever that may be. Communication challenges are universal.

Better Communication with Coaching

Strong communication skills are among the hardest human resource assets to find in the business world. People with talent in this area often command substantial salaries and respected positions because this skill set is essential and valuable.

However, all your employees can learn communication skills, conflict resolution, and understanding of different communication styles. That is if they have the right coaching. Training your employees in basic communication skills creates a cycle of positive reinforcement throughout your business, as better outcomes from

more effective communication drive further efforts to positive communication.

Understanding Communication Styles

In our workshops, we complete communication style exercises to help team members understand the different communication styles. We discuss how to identify them, and the strengths and challenges of each style.

We are a proud Award-winning Everything DiSC® Authorized Partner. The *Everything DiSC® Workplace* program covers communication basics.

This simple yet powerful model describes four basic styles: D, i, S, and C, and they serve as the foundation for the Everything DiSC® Application

Suite. Each communication style has definite characteristics. Knowledge of these characteristics allows you to flex your style to anticipate others' reactions and adapt your style to respond most effectively.

The Main Communication Styles and Their Key Characteristics, outlined by Everything DiSC®:

D = Dominance

A person primarily in this DiSC quadrant emphasizes accomplishing results and "seeing the big picture." *They are confident, sometimes blunt, outspoken, and demanding.*

i = influence

A person in this DiSC quadrant emphasizes influencing or persuading others. *They tend to be enthusiastic, optimistic, open, trusting, and energetic.*

S = Steadiness

A person in this DiSC quadrant emphasizes cooperation, sincerity, loyalty, and dependability. *They tend to have calm, deliberate dispositions and don't like to be rushed.*

C = Conscientiousness

A person in this DiSC quadrant emphasizes quality and accuracy, expertise, and competency. *They enjoy their independence, demand the details, and often fear being wrong.*

One of these communication styles might seem more like you than others. But it's important to note that each of us is a combination of these styles.

Each has its benefits, and one isn't better than the others. Rather, these styles denote the best way to communicate with others depending on their assessment. This insight is invaluable for businesses for sales, customer interactions, and virtually any other communication operation.

Is it Helpful to Know Your Workplace Personality?

Many people have found they do not understand their work relationships and colleagues. They may have found themselves in conflict with others and unsure how to handle it.

If we understand our workplace personality, we can better understand how we relate to others and vice versa.

Conflict in the workplace can have a negative drain on culture, and according to a survey of Fortune 500 companies, 92% say improving their corporate culture would improve the value of their company. A poor or weak company culture can:

- Negatively impacts employee stress levels.

- Increase employee turnover.

- Harm customer service levels.

- Decrease in company sales and profits.

Engaged employees can help companies achieve a competitive advantage that impacts ROI (Return on Investment).

Today's employees expect their company (and the leader) to care how they feel at work and may even decide whether to accept a job offer based on what they perceive the culture to be.

With Workplace Personality Training **(Everything DiSC® Workplace**), the focus begins on understanding ourselves and our typical personality style. The training continues on how to understand others and how to build more effective relationships at work.

We had recently worked with a large team of emerging leaders who had opportunities to interact with each other daily, including meetings, lunch hours, and on committees. During the months we worked with them, the ongoing comments on what a difference it made to understanding not only their own motivators and stressors, but also learning how to understand each other, and how to effectively communicate, which contributed to more effective relationships. Leadership also commented that the team was more open and willing to "manage up" rather than avoid uncomfortable conversations.

The **Everything DiSC Workplace®** is a personal development learning experience that measures an individual's preferences and tendencies based on the DiSC® model.

This simple yet powerful model describes four basic styles, and participants receive personalized insights that deepen their understanding of self and others, making workplace interactions more enjoyable and effective.

The result is a more engaging and collaborative workforce that can spark meaningful organizational culture improvement.

Everything DiSC® is an assessment-based learning
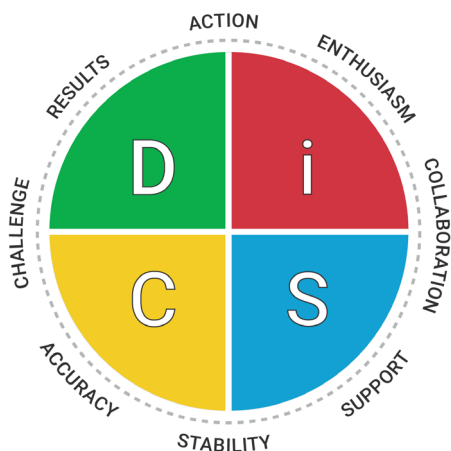
experience that deepens self-awareness, inspires appreciation of others, and fosters effective collaboration in the workplace. Backed by over 40 years of research, participants can expect customizable solutions that meet their unique training needs.

In a classroom or virtual setting, the training and personalized learning experience teaches participants to understand themselves and others, while learning to appreciate the different priorities, preferences and values each individual brings to the workplace.

With personalized insights and actionable strategies, participants learn how to adapt to the style of others, ultimately improving engagement, collaboration, and the overall quality of the workplace. Everyone can benefit from that,

regardless of title, position, department, or function.

The workshop is interactive, includes activities, and provides resources for future reference on topics such as discovering one's style, understanding others, and building more effective relationships.

Participants are provided with valuable insights that unlock engagement and inspire effective collaboration. In a personalized 20-page profile, participants will explore priorities that drive their behaviour, learn what comes naturally and what might be challenging when interacting with others. All participants gain actionable strategies to strengthen their interpersonal skills at all levels in their workplace.

Understanding the **Everything DiSC®** program provides valuable insights that will help you better understand yourself and others, all while offering actionable ways to strengthen your relationships in the workplace.

Using a research-validated learning model, this training offers personalized insights for participants, helping you discover how to connect better and effectively work with each other.

Everything DiSC® can be used with people at any level in an organization, ultimately improving the quality of the workplace.

With **Everything DiSC®**, team members will be able to:

- Discover their DiSC® style.

- Understand other styles.

- Build more effective relationships.

Everything DiSC® connects people on a human level to deliver "A-ha!" moments. This transforms the workplace from talented individuals into collaborative, thriving cultures. Each workplace has unique needs. **Everything DiSC®** provides versatile tailoring features that allow each organization to design a customized program that is right for them.

A personalized learning experience can benefit every person in an organization – regardless of title or position, in building more effective relationships at work.

Effective workplace communication is important for several reasons:

- Improved collaboration between team members.

- Increased productivity so that employees can become more efficient.

- Better decision-making encourages employees to share ideas and opinions.

- Improved relationships create a more positive work environment.

- Customer satisfaction since employees are better trained and can engage effectively in more situations.

Adopting a retention strategy that includes helping employees and leadership learn how to work together and collaborate is a good first step.

It has never been more important for organizations to have retention strategies for their employees. With the enormous attention The Great Resignation and Quiet Quitting are receiving, organizations cannot afford to lack employee loyalty, have poor morale, or be challenged with succession.

The Great Resignation

The Great Resignation has been labelled as such since a much larger number of employees than in the past are leaving their jobs.

Harvard Business Review reported a record number of resignations in mid-2021. Many employees reported reaching their breaking point after months of high workloads, hiring freezes, and other pressures.

We have all noticed it is easier to work with certain people than others. Of course, we already know we can relate better to some colleagues. Until now, we did not necessarily understand why. Behavioural changes can be created by:

- Unlocking engagement.

- Inspiring collaboration.

- Igniting cultural transformation.

Wouldn't having a workplace resource to help employees and employers understand and appreciate how their differences equate to organizational strengths be great? There is such a resource! (Ask the team at X5 Management about **Everything DiSC®**).

> *Regarding the Great Resignation, there are ways to help boost your retention rates!*

In the ***Everything DiSC® Management*** program, we focus our training on five key areas (one-on-one management of each employee reporting to that manager):

1. Understanding DiSC® styles.

2. Directing and delegating.

3. Creating a motivating environment.

4. Developing others with different styles.

5. Identifying strategies for working more effectively with managers.

The more you understand how your team members, customers, and prospects like to communicate. And be communicated with, the easier it will be to achieve a positive outcome in any sales or customer service situation and of course enhance employee retention.

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

Chapter Three

Strategy Two — Onboarding, Training and Coaching

Basics of Onboarding

Integrating new hires into an organization, including familiarization with policies, procedures, and culture, is an important first step in retaining employees.

Some basics of employee onboarding include:

- Welcome new employees by sending a warm welcome message to them on their first day. This ensures they get introduced to their colleagues and managers and gives them a tour of the workplace. Although this might be associated with a Human Resources function, creating an employee Onboarding Committee is worth considering too.

- Provide written organizational information, such as an overview of the corporate mission, vision, values, history, and goals.

Job information is also important, including job responsibilities, performance expectations, and career growth opportunities. Some, or much, of this may have been covered during the interview process; however, it is worth repeating. A job description should also be reviewed and shared specific to the role.

- Share important policies and procedures related to attendance, punctuality, dress code, and expected workplace behaviour. These should be part of an onboarding kit for future reference, bearing in mind there is a lot to remember when starting with a new organization.

- Training and support are critical and must be timed according to the job responsibilities and anticipating the learning curve. Scheduling this in advance will keep training on track and avoid getting sidetracked with questions. Available resources unrelated to the role, such as IT, HR and other support departments, should also be covered now. If your organization does not have these functioning departments, someone within the organization must take on that

responsibility or perhaps it can be outsourced.

- Create a plan to monitor progress so that regular check-ins are anticipated and appreciated. Providing feedback does not have to wait for a formal performance review, so offering feedback should start as soon as possible.

- Celebrate and recognize a new employee's accomplishments and milestones. This demonstrates the idea that recognition is part of the organization's culture and does not have to wait for the usual work anniversary. It also helps create momentum.

How to Develop a Superior Team

Many teams do a lot of things very well. But sometimes, they lack specific ideas or skills in certain areas to reach their full potential. Developing a superior team requires a combination of initiatives such as:

- Strategic Planning.

- Learning how to communicate effectively.

- Training investments in employee growth
  and development.

5 Key Areas in Team Development

1. Hire the right people.

Start by hiring individuals with the right skills,
experience, and attitude to thrive in your
organization.

Look for candidates who share your organization's
values and vision and have a strong work ethic.
Given a choice, many hiring managers consider
attitude over skill since skills can be taught.
Attitude is internal.

2. Consider Your Culture

Always foster a positive culture by supporting open communication and team collaboration. Always encourage creativity and innovation, creating an open-door policy at all levels and encouraging personal and professional development at all levels.

There is more to culture than this; however, these basics can start an organization on the right trajectory. The ideal culture is built on trust and respect, not micro-managing decision-making and initiatives.

3. Communication

Expectations must be clear for each employee's roles and responsibilities. It is ideal if employees participate in setting their objectives for performance and professional growth. Transparent leadership, including vulnerability, is appreciated by employees, and when leadership is considered "human, " employees will likely rally and support decision-making.

4. Opportunities for Professional and Personal Growth

Organizations that emphasize training and development encourage their employees to reach further and consider roles they may not be qualified for today but can learn. Opportunities for developing skills and knowledge can be provided through training. Consider a third-party trainer if the organization does not have a large training department, mentorship programs, and job shadowing. Encourage employees to take ownership of their growth and development.

5. Rewards and Recognition

Reward and recognize excellence, not only milestone anniversaries. Employees who consistently perform at a high level (measures and KPIs need to exist) should be recognized, including low cost and impactful methods such as a note from a senior leader. Using a combination of financial and non-financial rewards is ideal since not all roles are tied directly to financials, but indirect excellent performance has an impact.

Developing Your Team

Remember: Customer service is the one thing any business can control, 24/7, 365 days a year. Every business has customers. This needs to be emphasized throughout every department. Taking the time and attention to strengthen your team's soft skills is critical. Team training, such as communication, productive conflict, and leadership development, is important.

Teamwork is another important consideration, and the stronger the team, the more collaboration and cohesion the team has. That leads to peer-to-peer support, an engaged culture, and a workplace celebrating progress and accomplishments.

Is Team Engagement a Priority

Do you have team engagement on your mind? Now more than ever, with many businesses operating from different models, it's a challenge that plagues leaders in many industries.

Some employees are working remotely, permanently, in certain workplaces. Some employees have been mandated back to work and are unhappy about it.

Some employees can blend their work time between the office and home; the hybrid workplace model has been created! This is likely the most common scenario, and it appears somewhat chaotic without all the planning necessary to get the right team working together in the right place at the right time.

Team Engagement Requires Creativity and Innovation

Despite the best efforts of management teams to maintain morale and team engagement throughout the upheaval of the past year and a half, employees continue to drift back into old patterns and struggle to find their way back to a new normal.

Not only does this negative culture affect traditional business metrics like productivity, but it also acts as a major impediment to innovation and growth by disrupting efforts at improvement and tackling new challenges. This pervasive negative culture is even more of a problem during an economic downturn.

These are times when businesses must be especially creative and flexible to adjust to the harsher conditions they face.

Business leaders need to understand and empathize with the "cost" of employees returning to work. Because for two years during the pandemic, savings were considerable, with no extra funds were spent on gas, clothing or coffee.

Employees took that in stride as a necessary expense until they learned that working from home meant extra money at the end of the week.

Unfortunately, when a business needs creativity, innovation, and entrepreneurship, these are often the times when their employees are least likely to demonstrate team engagement. Or, more specifically, the necessary positive cultural attitude toward their work and the company.

Is Your Workforce Too Busy, or Do They Need More Training?

It sets the tone for the entire organization; ultimately, corporate culture will start at the top. But it starts with leadership, understanding what's going well and what we could do differently. It's

asking the employees, but then it's walking the walk and talking the talk. It's not putting some highlights on paper and expecting everyone to think we have a great culture. It's going to trickle down, and it's going to move sideways, but only if the entire leadership team is bought in and can support it. It's important to be prepared to support what the employees might ask for.

We have a changing workforce, and now's one of the first times there are up to five generations in the workforce. Each generation is going to require or request something slightly different. It's up to leadership to be aware of that and to be able to react to it.

Flexibility in Today's Workforce is Critical.

The days of everyone working the same hours on the same weekdays, in the same environment, are over. The pandemic taught us that we can function quite well in different situations. In some cases, again, workplaces or leadership must be flexible. It's very powerful to recognize some of the challenges in today's environment and is the leadership group aware. That could be cultural, diversity, equity, and areas that the younger

generation is fully aware of, and they expect their leadership group to weave into the culture.

Organizations also have cultural differences, whether celebrating holidays or recognizing employees differently, which are all important. When you hit your milestone, five-year or tenth anniversary, the handshake is not what employees are looking for now.

Food for Thought

Companies in countries around the world have been running trials of the four-day workweek and finding positive results. John Stewart, founding partner at a private equity firm, says a pilot program that began several months ago at his firm is going well, and he's receiving inbound interest from other PE firms that are considering a similar model.

Some businesses have since decided to permanently adopt the four-day workweek or phase it in over time. When Stewart first announced his plan to phase in the four-day workweek on LinkedIn at the beginning of 2023,

there wasn't a lot of positive feedback. "Some people were calling me crazy," he says.

Stewart's strategy was to start by making 20% of the year a four-day work week and gradually apply that schedule to the full year over a five-year period. His firm started by offering days off to align with holidays, so that employees could enjoy a long weekend. "With a four-day weekend, you can actually go somewhere."

"We've seen the research on the four-day workweek and its benefits on mental health and productivity," Stewart says of his decision to implement the shortened schedule. He adds that employee engagement and well-being are important, and the four-day workweek is just one of many benefits Stewart offers to staff.

Retention is important to Stewart, especially during recent trends of the "Great Resignation" and "Quiet Quitting." Hiring and training new employees is costly, he notes, so keeping good team members is crucial. The approach seems to be working so far, as the firm has had low turnover: Only three people quit in the last three years. The firm currently employs 120 people.

It's All About Responsibility

> *"X5 Management has played a key role in training and coaching at our dealership, which has enhanced our team's communication and working relationships!"*
> *- Brent Lawrence*
> *Director of Parts & Service Operations*

Stahl

Peterbilt

When a culture is positive and strong, the teams within do a good job of maintaining it. They almost take care of their own. When it's good, we want to protect you. When you're not part of this culture and not drinking the leading practice of cultural Kool-Aid, it's way easier to deselect someone like that.

Creating a Culture of Positive Entrepreneurship

A culture of positive entrepreneurship that runs through the company and across its employees requires more than the occasional pep talk.

Such a culture is the product of an everyday commitment. A commitment to structuring the business in a way that promotes positive employee attitudes.

This structure naturally makes employees feel important in creating a product or service that satisfies their customers.

Naturally, everyone wants to feel that what they do is important and valued. However, it can be difficult for many employees to see their contribution's impact on the company's overall reputation and the quality of its products and services. Can you guess what happens then? You guessed it: a lack of team engagement.

Your Culture Isn't Something You Wing

Some techniques can help structure a business where employees naturally develop this sense of engagement and ownership. These techniques give every employee a sense of the importance and meaning of their role in the greater structure of the overall company.

They also drive employees to develop a sense of responsibility that doesn't require constant reinforcement from management.

This organic culture of team engagement means all employees will naturally look for ways to improve what they do. They will want to perform above and beyond the expected through self-directed innovation and entrepreneurship.

Like many businesses today, your employees' entrepreneurship can boost your company's opportunities amid tough economic conditions.

Positive attitudes come after letting go of the past and welcoming what's to come. This takes courage and doing things a little differently. Ditching the conventional opens limitless possibilities. Try to aim beyond the competitive landscape, trends move fast, and you must be faster.

Team Engagement Comes with Small Steps Every Day

Here are eight ways small everyday team engagement can drive huge results inspired by **Josh Linkner's Big Little Breakthroughs:**

1. Learn to love the problem. And not the problem but the process of working through it. Encourage your team to stay open to different paths and enjoy the ride.

2. Start making changes now. Don't wait until you are "ready." Get going.

3. Test it out. You'll find your organization's sweet spot by exploring different paths and frameworks. Your team and customers will thank you for being flexible and finding the right fit.

4. Ensure your team doesn't grow too attached to a specific framework. Be open to deconstructing and rebuilding. It will keep you on the cutting edge and help you avoid complacency.

5. Ditch the conventional. This is all about new ideas which bring about better outcomes. Don't fear the unknown— go for it.

6. Get resourceful and do more with less. Make your work more about ideas and ingenuity and less about resources. Lean on your people to get creative with what you have.

7. Add a little WOW factor. How can you surprise and delight your audience?

8. Lean on your resilience. Understand that with ideas and growth, there will be setbacks. What matters is how you and your team keep going.

How to Save on Employee Training Costs

More than ever, investing in and training your employees is key to future business success. It has always been important. Regardless of a global crisis, pandemics, or economic uncertainty, our employees and team members matter to our business!

A team of employees with developed technical skills specific to their role or essential skills like communication, emotional intelligence, productive conflict, and more are vital to their future growth and development, regardless of industry or job title.

While there may have been less emphasis on training during 2020-2021, businesses focused on overall business survival in the face of COVID-19, innovating and pivoting as required, it is encouraging to see a shift in attention to more training and development in the past year as we emerge from the other side of the pandemic.

As a business that provides Training, Coaching, and Consulting Solutions to businesses, our team has been seeing a steady increase in training inquiries.

X5 Management's training programs are tailored for each customer and are proven to deliver lasting results. Some of the programs we offer are:

- **Enhancing Essential Skills:** With a focus on enhancing communication, collaboration, and service delivery, this foundational program will build the skills of the entire team, from frontline workers to Executive Leadership.

- **Sales and Customer Service:** From the rookie to the veteran sales professional, this training helps salespeople create customer-centric interactions that improve results.

- **Team Development:** As an award-winning Authorized Partner of The Five Behaviors™ program, X5 Management works with teams to help them gain alignment in the five areas of The Five Behaviors model: Trust, Conflict, Commitment, Accountability and Results.

- **Leadership Development:** Focuses on helping leaders understand their leadership styles and how their tendencies influence their effectiveness in specific leadership situations. Participants learn how their style influences managing time, making decisions, and approaching problems. They also learn what they need to do to adapt to the styles of others to bring out the best in every employee in their charge.

A key consideration for business owners and leaders is the cost and how it will impact their organizational training budget.

Fortunately, a viable solution can serve most businesses well from a budget perspective: The Canada-Alberta Job Grant. This grant has been available for several years. However, recent changes have enhanced the process and flexibility

for businesses wishing to use the grant to help fund training costs.

What is the Canada-Alberta Job Grant?

The Canada-Alberta Job Grant is an employer-driven training program. Employers use a third-party training provider like X5 Management to deliver formal training to new or existing employees. The Grant pays up to two-thirds of the total cost of training and can cover up to $300,000 per fiscal year for the employer or up to $10,000 per employee. There are likely other Provincial Grants available too.

The grant allows businesses to provide employee training to enhance their skills to help drive optimal results for their employer. Using the Canada Alberta Job Grant to invest in employee training is a smart and cost-effective way to bring out the best in your team. Ultimately, it helps you take your business to the next level.

The training format is a combination of half or full-day on-site and virtual workshops. Additionally, the programs are at least 21 hours in total, and usually delivered over three to six months or longer in some cases.

By accessing Canada-Alberta Job Grant training grants, employers must show how the training will:

- Impact on an employee's role.

- Impact on an employee's job title.

- Increase an employee's salary.

- Provide the business with new abilities.

- Support new job opportunities.

While there are specific criteria to qualify and be approved for grant funding, our team at X5 can help with the process.

Consider the Benefits

The benefits of supporting your employees with training are obvious.

> *What many leaders do not realize was found in a 2022 Lorman survey. Nearly 59% of employees claim they had no workplace training and that most of their skills were self-taught. In the same survey, 74% of employees said they were willing to learn new skills.*

Employees believe learning and development in their workplace are important; therefore, offering training and development becomes a retention strategy.

In September 2022, Statistics Canada reported close to one million job openings! A retention strategy and a comprehensive succession plan are critical.

Organizations need well-trained employees to remain competitive. There has never been a better time to assess your employee training needs! It's time to learn more about your organization's eligibility for the Canada-Alberta Job Grant.

We are happy to help you with a complimentary, no-obligation consultation to review this opportunity further.

> ***CFO asks CEO****:*
>
> *"What happens if we invest in developing our people and then they leave us?"*
>
> ***CEO responds****:*
>
> *"What happens if we don't, and they stay?"*

Is Coaching Important

Have you seen an Olympic-calibre athlete who doesn't have a coach?

Of course not. A mix of athletic talent and coaching support catapults athletes to the highest competitive levels. Successful executives are no different. They possess experience, skills, and the support of an effective coach that helps them achieve the best results.

Yes, executive/leadership coaching is important, and it is a growing field.

According to the International Coaching Federation (ICF), in 2019, there were 71,000 coaches, an increase of 33% from four years earlier. Again, according to the ICF, the number of leaders using coaching services is estimated to have risen by almost half (46%), with some countries reporting double to triple that increase.

Coaches challenge and encourage. The coach's role is not to sugar-coat performance and decisions but to help their coachee come to their own conclusions regarding performance and behaviour improvement through a series of question-based coaching questions.

Coaching Relationships

According to Harvard Business Review, a successful coaching relationship should have the following ingredients:

- The executive must be highly motivated to change or improve.

- The coach and the executive must be compatible, sharing mutual respect.

- There is a strong commitment from the organization's leadership to invest in the executive.

- There is an attitude of flexibility to adapt the coaching focus as required.

In today's business environment, hiring an executive/leadership coach is being proactive. High-performance achievers have a never-ending desire to increase their potential and know a coach can help. Their driven growth mindset may have them working excessive hours and expecting their subordinates to do the same. They may appear engaged but are distracted while multi-tasking and feeling chaotic. A coach can help find balance and solutions to managing priorities and time.

Working with a coach is a journey and does not have an end date, even if breaks are taken from coaching.

Consider a coach a confidante who shares their outlook based on personal experience and training and offers observations and feedback on areas such as:

- Work performance.

- Job effectiveness.

- Career direction.

- Organizational design.

- Priorities and time management.

- Change management.

- Strategic planning and execution.

- Soft skills development or improvement.

- Workplace relationships.

Many managers and leaders can become mentors and coaches to their team if an external coach is not an option. Having said that, there may be a need for training and guidance to help make internal mentors and coaches more effective.

> *"I try very hard to practice what I coach on, and having my own business Coach is no exception. The Coaching relationship that I have built with my business Coach, since of the spring of 2021, has been a game-changer for me and our business at X5 Management. For me, it is an investment, not a cost, and allows me to have a trusted advisor and sounding board."*
> *—Mike Mack*

A Look into Targeted Research

A recent study by Merrill C. Anderson, Ph.D., of the effects of executive coaching indicated coaching produced a 788% return on investment (ROI).

Manchester Inc. surveyed 100 executives, and their research showed that a company's investment in executive coaching realized an average ROI of almost six times the cost of the coaching.

Finally, according to the ICF (International Coaching Federation), 86% of organizations surveyed saw an ROI on their coaching, and 96% of those who had an executive coach said they would repeat the process. Tangible factors were increased productivity, higher levels of overall performance, reduced costs, revenue and sales growth, higher employee retention, and higher engagement of employees. Intangible factors were increased confidence of those being coached, improved communication, stronger employee, and peer-to-peer relationships.

Company Branding is Important

A company's branding can be essential to attracting top talent. To build a company brand, one must define and implement an effective employer branding strategy. One needs to tell a compelling story about the company, and showcase its history or corporate culture, to get candidates excited to join the team. That's how to generate an internal referral process. When

candidates or employees are happy about working for a specific company and working for a good leader, they will talk about it.

Chapter Conclusion by Jason Dick, Recruitment Partners

In our experience and certainly, with our clients, I would say that turnover has been higher in the last five years, maybe more significant in the last three years. Average turnover rates have steadily risen over the last decade. Some industries are averaging between 25% and 45% turnover. Some of that can be attributed to the pandemic, but there are a few other contributing factors to employee turnover. Unemployment rates are at record-level lows. Great news for employees, but that can create rough waters for employers trying to hang on to top talent and making retention a top priority for many of our clients.

In 2022 the job market favoured employees and job seekers, prompting them to search for alternative career avenues. Organizations must understand and address retention and recruitment

issues to prevent employee loss and attract job seekers.

In the past, offering reasonable pay was enough. However, that's not necessarily the case now. Adequate compensation is important. Salary, bonuses, and profit sharing were reasons for leaving organizations. Even though the salaries were high, people still chose to look for alternative opportunities. Some examples, like lack of career development and advancement, are a top reason for turnover.

Make sure that learning opportunities and development schemes are available. So many people are looking for continued career development.

This can include opportunities for advancement, education, additional skills, or an environment that promotes learning and growth.

Also, people had other factors into why they were leaving and looked in the mirror and said, "What do I prioritize as something important in my career? Why do I stay with the company?"

When people had time to reflect on the pandemic on working from home, I think they reprioritized what was important to them.

To my earlier point about salary being super important and why people stayed, that was always an important factor, but maybe it's not number one anymore.

There have always been challenges in finding top-level talent. The early stages of the COVID-19 pandemic shut down offices and office space. Then as the economy started to rebound, candidates were searching for more fulfilling prospects, to my earlier point about different reasons and priorities in their job search. So that caused that candidate-short market. We're currently experiencing that candidate short market in Canada as a whole.

Attracting the right candidates has always been a big challenge. Some companies in the smaller to mid-market may lack an HR department. So, they have a lack of internal HR and a lack of internal recruiters that can go out to market. They may lack a sophisticated recruitment strategy. Their strategy may be to post a job on a job board and wait to see what comes in.

Good candidates are often contacted regularly by other employers who may be competitors, making it hard for a company to stand out. Candidates with hard-to-find skill sets often consider several job offers simultaneously, so one needs to put extra effort into pursuing and persuading these passive candidates to choose your company over your competitors.

I always encourage people to create an efficient recruitment process and improve the candidate experience; first impressions are key to candidates, especially selective and passive candidates.

Hiring teams need to communicate effectively, communicate fast, evaluate candidates easily, and know what's going on every step of the way. Part of our role is always making sure our clients know where potential candidates are in their job search so that they're not blindsided when they're ready to move forward with a candidate, and then perhaps that candidate is no longer available.

Many studies show that the cost of losing an employee also depends on the position. Entry-level employee turnover cost may be 30 to 50% of their annual salary to replace somebody. Mid-level employee turnover sometimes costs 150% of that

annual salary. And on the higher extremes, the more senior level, or highly specialized employees, including your C-Suites, sometimes can cost three and four hundred percent of your annual salary to replace. Losing employees have indirect costs that aren't easy to pinpoint or calculate.

Once you've made that hire, create and maintain an effective onboarding process. Why think about how you're onboarding new hires? The process of retaining employees begins on day one, sometimes even leading up to day one. The most effective organizations onboard new hires for the whole first year. You know, we traditionally think of those first three months as being critical, but it's something that you need to work on throughout that whole first year and have a strategy.

Another main factor, or a suggestion I would make, is setting the workplace in the culture. Provide a comfortable work environment and culture. Some companies even have game rooms and recreation areas to help employees unwind when things get stressful. Provide sufficient training and support to newcomers to help them adjust and manage independently. Also, company culture is a popular topic of conversation with leadership teams.

Having a recognition and reward system is also important. Make a habit of letting employees feel that they're appreciated. They get paid for providing a service, but let them know they're appreciated. Provide recognition and thank them for going the extra mile or doing a well-done job. We can also provide different perks like VIP tickets to an event, gift cards, movie passes, and maybe an extra day off for hitting a target. If they hit their sales target, they may get a day off that next month. You can set up reward systems even on a small team that could be on a relatively low budget.

Lastly, be a good boss. Many people leave roles, sometimes because of uninspired leadership, lack of leadership, or their boss. A factor that makes employees want to leave is their relationship with their boss. Be kind and treat employees well. Trust me, having a kind, understanding, and empathetic leader can also significantly impact employee retention.

Relationships within the office are crucial to the success of your business and employee morale, which increases your retention rates.

Chapter Four

Strategy Three — Management and Leadership

Your Culture is Your Brand – 5 Tips to Get it Right.

Most companies list customer service as their main competitive advantage and set goals to improve for each coming year. However, not all succeed. Why? *Hint: It all comes down to company culture.*

The priorities and focus of a company extend down to the customer support and sales teams within that organization.

Ultimately, the behaviour at those levels reflects these teams. For example, if the company only cares about the bottom line, this will present itself in the customer experience.

The reason an organization delivers good or bad customer service comes down to one thing: what is happening on the inside of that organization.

> *To sum it up in two words;*
> ***Company Culture**.*
> *Engaged Employees = Engaged Customers.*
>
> *"You can't have deeply engaged customers
> without deeply engaged employees."*

Company culture has a huge impact on customer service. Great customer service is more than hiring the right people; it is about hiring people with great attitudes, offering the best customer service training, and creating an environment in which they will thrive.

Company leaders must treat their employees how they want their customers to be treated – setting an example at the top so that the only attitude trickling down is a positive one.

A Customer-focused Company Culture is One Necessity

When we think of customer-focused company culture, a few companies, including Google and Apple, come to mind.

If your company is **amazing** to work for, people love coming to work, and there is a contagious enthusiasm about how they are treated, then the customer will feel it. After all, isn't that what a customer service-focused culture is about?

How Can Companies Accomplish Great Company Culture That Results in a Customer-Focused Culture?

For a company to put its best foot forward, it must set an example of customer service behaviour from the top.

Implementing a positive and fun company culture will instil loyalty, drive, and ambition in all employees and ensure that they work hard for the company they 'love' to work for. They will want to see it succeed.

That is what's called creating company culture – and it matters. The following are five tips for getting this right.

1. **Establish the culture early on to ensure it sticks.**

When interviewing a person, interview for compatibility with the question: "Does this person share our company values?"

Asking value-based questions can be a good indicator of whether someone might fit the company culture. This is how you protect the culture and hire the right people. An adage says, "Hire for attitude and train the skill." Even with the right attitude, will the new employee fit into the culture you are trying to build or sustain? Look beyond their attitude and focus on their personality. Make sure there is a cultural fit.

2. **Train for the culture.**

If the employee has the right attitude and a personality that meshes with your culture, get them up to speed and entrenched in your culture as quickly as possible.

They must understand what the company stands for, its goals, mission, and vision.

Understanding the company's goals, mission, and vision on paper is one thing, but employees must be able to live the essence of these statements.

Love the concept of the 'mantra,' which is a sentence version of the goals, vision and mission that succinctly sums up the company's culture.

3. Teaching a work-life balance only serves to kill creativity.

When asked about keeping work and personal life separate, the late Tony Hsieh (founder of Zappos) said, "There are companies that focus on work-life separation or work-life balance, and at Zappos, we focus on work-life integration, and at the end of the day it's life … if you spend so much time at work, you better enjoy the time that you're spending there and people that you're with."

If there's one thing you can take to the bank, it's the fact that post-pandemic employees are more aware of work-life balance, so ensure flexibility.

4. Allow people to experiment.

This is another way of saying people are empowered to try and do new things, and it is especially true in customer service.

I love to share the story of visiting a local restaurant. After being greeted, I was asked, "Do you have reservations?" I admitted that I did not, and the waiter replied, "No worries, Mr. Mack, that

becomes my problem." Even to this day, that line is still etched in my mind, and it was, and continues to be, one of the most remarkable statements that I have ever heard from a customer service perspective! Here's the point, if you aren't willing to make your customer's problem your problem, then who will? Your competition? When was the last time that you made your customer's problem your problem? Did you collaborate on a win-win solution? Did you suggest that "we" will figure this out together? Customer Service is defined as: "The assistance and advice provided by a company to those people who buy or use its products or services." Offering assistance and advice must include dealing with a customer's problem. Not all problems or customer situations are common or can be outlined in a manual. That is why it is important to empower employees who are face-to-face with their customers.

The outcome should be favorable for the customer, not hurt the company (financially, legally, etc.) and enhance the relationship with the customer. Share the best ideas and allow for creativity; there is no better way to engage an employee group.

5. Create a learning environment.

Finally, this is one of the company's most important initiatives. Statistically, a large percentage of employees stay with a company because they feel they are learning, and the learning is facilitating their work performance improvement.

Offering appropriate training courses, creating a well-promoted succession plan, and identifying emerging leaders early on will give a company an excellent reputation. This learning culture will have a very positive impact.

> *"Your leaders are the megaphone for the company's culture. In a world of soundbites and tweets, our leaders have a moral obligation in what they say and how they behave."*
> *— Michael Fraccaro,*
> *Chief People Officer MasterCard*

Management Versus Leadership

There are key differences between a good manager and a good leader; organizations should recognize these.

A good manager focuses on achieving specific goals and objectives within a set timeframe. Their role may often include frontline duties, whether to lead by example for training purposes or to assist during busy times. A manager is more likely to be in a development phase, so they may not feel they have the flexibility or autonomy that leadership has.

Managers often tend to communicate what has been communicated to them so that styles may be factual and somewhat less inspirational. The flexibility to divert from prepared communication may not be apparent, as the priority is to deliver the correct and prepared message.

Accountability is important for all levels of an organization, and managers may tend to do a good job of holding their team members accountable based on plans, processes, and procedures.

Leaders think of the bigger picture and may be prone to overlook specific details in their efforts to inspire and motivate their teams. This behaviour can put them on a pedestal and encourage a willingness to empower and inspire others.

When employees feel empowered, there is much more that leadership can learn from bottom-up feedback. Celebrate it all. Encourage people to learn from their successes and their failures. Share these lessons with everyone.

Leaders have learned to make decisions based on intuition and vision and let others work out the details. They are likely to think from a "WHY" perspective, then a "HOW" perspective. They also tend to hold themselves accountable before holding others accountable.

Suppose a company is amazing to work for and authentically cares about and invests in its people. In that case, the customer will feel in the service provided, and the business will ultimately win.

How to be a More Effective Manager

To be effective, managers must understand their existing management styles and tendencies and how well they relate to their team. No one can relate to others as effectively as they would like, and it begins by understanding where the gaps are. All managers will have certain tendencies that they enjoy most and some they find draining.

Managers can learn to be observant and note when they are most effective and when their limitations may be evident. They must learn how to flex to their team members' styles rather than expect them to flex to them. Some subtleties may come into play, which seem irrelevant but can be important. Behaviours such as body language, tone of voice or expression, and word choice will make one more relatable.

Asking effective questions while directing and delegating needs to be flexible with different personalities to be the most effective. Learning what motivates different team members will play a large role in management effectiveness, ideal communication, and the ideal team environment.

Managers must understand they are not only managers who manage but managers who mentor as well. As a mentor, the ideal attitude to have is always building on team members' strengths rather than making it a priority to fix a weakness.

Important management skills to possess include:

- Time Management.
- Decision-making and problem-solving.
- Understanding one's natural management style.
- Understand the needs of other team members, including strengths and limitations.
- Being able to observe behaviours.
- Creating a motivational work environment.
- Creating Buy-in.
- Directly and delegating effectively.

The Work of Leaders in Leadership

Leadership has been studied for centuries, and it has been proven difficult to grasp what makes a "good leader."

Trait theory examines personality traits that identify important strengths and tend to predict leadership outcomes. Some of these traits include age (older), physicality (tall), gender (male), and status. But that theory gets debunked quickly when considering people like Joan of Arc and Napoleon. Situational leadership theories suggest that leadership is contextual and that a leader must shift relative to the situation requiring different but specific behaviours.

Keeping Control vs. Sharing Control

The latter half of the 21st-century leadership theory moved beyond the power and authority paradigm (command and control) to more empowerment theories.

The command-and-control power-based leadership was defined as transactional, i.e., a reward for compliance. The reverse side of this coin is transformational leadership, seen from an empowerment paradigm where power emanates from followers and is shared. Examples of this theory include Servant and Distributive.

Because all these theories demonstrate some accuracy in their analysis of successful leadership, the "right" leadership model is extremely hard to pin down.

The "Doing" of Leadership

Vision, Alignment, & Execution

HOW THE PROCESS WORKS

- Three steps: Vision, Alignment, and Execution
  - Three drivers for each step (e.g., Exploration, Boldness, Testing Assumptions)
    - Two behavioral continua for each driver (e.g., Remaining Open, Prioritizing the Big Picture)

Crafting a **Vision**

Building **Alignment**

Championing **Execution**

EXPLORATION
- Remaining Open
- Prioritizing the Big Picture

CLARITY
- Explaining Rationale
- Structuring Messages

MOMENTUM
- Being Driven
- Initiating Action

BOLDNESS
- Being Adventurous
- Speaking Out

DIALOGUE
- Exchanging Perspectives
- Being Receptive

STRUCTURE
- Providing a Plan
- Analyzing In-Depth

TESTING ASSUMPTIONS
- Seeking Counsel
- Exploring Implications

INSPIRATION
- Being Expressive
- Being Encouraging

FEEDBACK
- Addressing Problems
- Offering Praise

In their book "*The Work of Leaders; How Vision, Alignment, And Execution Will Change the Way You Lead*" (2013), Straw, Scullard, Kukkonen, and Davis

move away from theory and offer leaders a simple structure that captures the complexity of contemporary leadership. What leaders do – the actual work that matters – is summarized in what they refer to as the **VAE** model: "Vision, Alignment, Execution." Here is the "Work of Leaders" Overview.

The Crafting of a Vision –*Imagining an improved future state that the group will make a reality through its work.*

Here's an interesting concept; humankind is the only animal considering the future (Gilbert, 2006). So if we think about the future and place that thinking in a workplace context, visioning is critical to a leader's work.

A lack of vision creates confusion, lowers morale and trust, and impacts interactions between staff and customers. Straw, et al. start with the assumption that visioning is not one leader's work, but every leader's work.

Visions are crafted to inspire, reimagine, and provide purpose in our working lives.

In the model above, Vision starts with Exploration by remaining open and prioritizing the big picture. In his book "The Advantage" (2012), Patrick Lencioni suggests organizations ask six critical questions about themselves that speak to prioritizing the big picture. They are:

1. Why do we exist?

2. How do we behave?

3. What do we do?

4. How will we succeed?

5. What is most important right now?

6. Who must do what?

For a vision to be bold, it must be adventurous. "Protect the House" by playing it safe is not a bold vision. It can reinforce mediocrity and allows people to shrink as opposed to stretch. To make your vision bold, ask, "What is the worst that could happen" or "What is the best that can happen?

Finally, under Exploration, test your assumptions by looking outside your organization for fresh perspectives and approaching trusted colleagues

one on one with your ideas. This will give you a good barometer of your bold vision and how it may be tweaked to gain stronger buy-in.

Building Alignment – *Getting to the point where everyone in the group understands, and is committed to, the organization's direction.*

In its simplest terms, Building Alignment means gaining buy-in on your vision across the organization.

A simple statement – a complex challenge! This means ensuring that each person understands their role in making the vision a reality. Leaders must do this with deliberation, time, and commitment; do not expect all employees to embrace the vision. A lack of alignment causes workarounds, passive-aggressive behaviour, and perhaps even outright attempts to sabotage the vision. By taking the time and the energy to build alignment, leaders will conserve time and energy trying to undo efforts misaligned with their vision.

There is a delicate balance in communicating a vision, from too much information to insufficient information. As the crafter of the vision, it can be easy to assume that employees already understand

the intent or purpose of your vision or over-communicate by sharing every small but irrelevant detail in communicating the vision going forward.

This is more art form than science. Here are some tips for communicating your vision with clarity:

- Present your vision in a succinct, powerful, and structured message – eight words or less if possible.

- Be straightforward and transparent – put yourself in the listener's shoes.

- Use visuals and metaphors if and where possible.

- Explain not only the vision but the "why" of the vision.

Championing Execution – *ensuring that the conditions are present for the imagined future to be turned into a reality.*

While leaders may not necessarily be involved in the day-to-day implementation of the vision, they have the responsibility to ensure that people have the resources they need to deliver the best results toward that vision. This includes strategies, the right people in the right roles, and a culture of curiosity to keep the vision driving forward.

Leaders must be the champions of executing the vision. Words such as defend, advocate, lobby, cheerleader, and booster are all words that leaders must embrace to build and maintain the momentum of the process. When employees see leaders champion the execution of the vision, it speaks as a tangible sign of their commitment. This is not talk but "walking the walk" and demonstrating momentum beyond aspiration to actual reality. The phrase *"beyond the realm of possibility"* can be shifted to *"within the realm of possibility."*

"Leadership is not a destination; leadership is what happens in the next 10 minutes." This famous quote by Tom Peters speaks to the importance of continued momentum and establishing a sense of urgency.

Being driven means using appropriate deadlines tied to an outside commitment (conference, AGM) and keeping the work at a pace that keeps momentum driving forward.

Instead of waiting till next week or until someone comes back from vacation, momentum means we don't wait around, and we keep moving forward.

When the question is posed, *"Who owns the burden of success?"* the answer should be everyone.

The initiative, or initiating action, means everyone takes responsibility for change when needed. This means that leaders must not only develop the habit of stepping back and asking one of the original questions posed by Lencioni, *"What are the most important things we could be doing to make a difference right now?"* but also create a culture that recognizes proactivity in looking for new initiatives as part of everyone's job.

Now that we desire to achieve the vision and momentum to move it forward, it is critical to provide a blueprint that ensures the right people will be doing the right things at the right time.

This gets everyone on the same page and provides a common foundation for teams to rely on. As leaders, it is not necessary to craft every plan detail but involve employees in the planning process. This translates into their support of the work they will be doing and increases the reliability of the plan itself.

While the plan is iterative, it does need to stay laser-focused on the ultimate vision. Knowing there will be hurdles and challenges, keeping abreast of how the plan unfolds will increase the likelihood that the team will produce consistent and desired results.

More Specific Leadership Training

There will be the quick "doers" and the slow "analyzers" in any organization. A good leader will create an environment for respectful and timely communication with team members that allows for in-depth analysis of issues or challenges that may be faced in the execution of the plan. This allows the teams to examine what might go wrong and what could go right. Are new opportunities in front of us because of our work, and how can we capture these new opportunities?

As the champions of execution, leaders must offer continuous feedback to their teams to ensure momentum is moving in the right direction. But is feedback necessary or discretionary?

There are many examples of leaders who only want to hear good news stories and hesitate to address issues and challenges.

We worked with a growing organization with a charismatic and outgoing leader who was most comfortable being the "nice guy" since he was motivated by recognition, friendly relationships, and social activities. The challenge was as the organization grew through customer acquisitions and bigger projects, the expectations of his team grew. Everyone had to become more efficient, and typically, with a growing organization, resources do not grow in proportion to revenues. Employee efficiency did not increase since he was not comfortable having what he perceived to be difficult conversations on expectations and accountability. For a business that relies heavily on word-of-mouth and referrals, slow customer service levels were an issue for the organization's reputation. We were able to offer training and coaching to all levels within the organization, so the team could work together and learn how to communicate candidly and promptly in giving and receiving feedback to overcome challenges.

Feedback must address two aspects: addressing problems when necessary and offering praise when called for.

One sensitive aspect of addressing problems is to focus on the problem itself and not the person.

Keep everyone's eye on the prize by looking for a solution and not laying blame. Acknowledge the issue, ask what went wrong, look for solutions, and recognize that continual growth is a part of success.

On the flip side, it is often a reflection that leaders tend to see what's wrong more than what they see as right.

> *In research by Straw et al., leaders "don't always seem aware of the contributions that employees make."*

It is human nature to want to feel appreciated and valued. Praise must not be orchestrated; it must be authentic and genuine. Get involved with your teams, seek opportunities to address a problem, and offer praise.

At X5 Management, "We Align Leaders and Teams to Achieve." It is our purpose, and it allows us to jump out of bed every day and help make that a reality for the organizations we work with.

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

Chapter Five
Strategy Four — Clarity, Commitment, and Accountability

Behaviours That Truly Make Up a Strong Team

There are many other ideas leaders can use to ensure their teams remain engaged or to re-engage with their teams.

Ask the team!

Create an engagement committee that changes quarterly. Be sensitive to new ideas and recognize everyone is different.

While one employee may prefer video conference from home, another may want to toss their computer screen aside for face-to-face communication.

These new workplace models offer a perfect opportunity to initiate new engagement campaigns and tactics that perhaps were not considered

before. Recognize times have changed, so it is time for change.

Keep in mind that priorities have also changed for many employees since early 2020, in light of the global pandemic, and business as usual will not move engagement and the all-important workplace culture forward.

Is Your Team as Strong as it can be?

Many factors go into evaluating whether a team is as strong as it can or should be, and it is always a work in progress.

Teams change as businesses change, team members leave or are added, and the business environment changes. A team does not "arrive" at a measurement of strength, which is a destination. Without any effort into building strong teams, there will not be one.

Building a strong team is a process and takes awareness, training, and follow-up.

The Five Behaviors of a Cohesive Team™ is an outstanding program for organizations that want to

improve or enhance their effectiveness working as a team.

The program is extremely useful for helping teams become productive and highly functioning. What organization would not want that?

The upside of such a team is:

1. Making better and quicker decisions.

2. The ability to tap into the skills and opinions of all team members.

3. Avoiding time wasters and energy on things like politics, confusion, and destructive behaviour.

4. Avoiding time spent talking about the wrong issues and revisiting the same topics due to a lack of buy-in.

5. Creating a competitive advantage.

6. More fun to be a part of the team!

We are all part of a team; even two people can be on a team. However, a team is usually a relatively small number of people (three to twelve) who meet regularly and are collectively responsible for results.

Team members should share common goals and the rewards and responsibilities for achieving them.

Creating a strong team is an important step toward culture. Cultures that are optimistic and effective also have a strong sense of team. Working together to benefit the organization's goals and accomplishments, rather than individual accomplishments, aptly describes what a team is about.

Having the skills and confidence to be candid, albeit respectful, with one another is also an important attribute of a strong team. This is learned, however, and is not typically assumed in an organization.

A positive, collaborative, and cohesive organizational culture promotes teamwork through an

RESULTS
ACCOUNTABILITY
COMMITMENT
CONFLICT
TRUST

The Five Behaviors® Model

ongoing, conscious effort. A collection of individuals chooses to actively follow The Five Behaviors® and continue to practice and check in

regarding their collective efforts and results. Like anything else, a cultural transformation does not happen overnight, nor does it happen by chance.

Without trust, there is no teamwork. But specifically, what does trust mean? Trust is confidence among teams that intentions are good, that competition does not exist, and most importantly (and often with difficulty), teams must become comfortable being vulnerable with each other. It should be okay, and without retribution, to admit mistakes.

There is often a fear of conflict, or conflict is viewed as a negative emotion. Conflict does not have to mean fighting or attacking one another but rather being productive and putting feelings aside to find a collective solution. Teams also need to respect disagreements; if a conversation gets heated, take it "offline" and private. Giving each other permission to debate often opens the door, to be honest.

Commitment to a team requires clarity and buy-in, even if consensus is not achieved. Consensus is rarely achieved, but the willingness to commit to the best decision, even if it requires risk-taking, is better than no decision. If team members cannot

offer opinions and contribute to a debate, buy-in cannot be achieved.

A culture of accountability must encourage team members to call on their peers on items that can impact the rest of the team. Leadership should lead by example and encourage the rest of the team to offer respectful and effective peer pressure to accomplish the goal. Leadership should encourage their teams to offer feedback up the ladder and ensure all team members feel they have permission to do so without consequences.

The ultimate behaviour is collective results if they are focused on clearly defined objectives and outcomes. Results need clarity and team commitment that is well-promoted. Leaders must reserve rewards and recognition for those who contribute to team goals, not those who work as individuals.

The Five Behaviors® Model is simple yet takes practice. Different personality styles and behaviours will react differently when first learning. Sometimes people are afraid of conflict, or perceived conflict, and of making mistakes. A supportive and vulnerable leader makes a difference and leads by example.

Some common obstacles to achieving cohesive teamwork include:

- Lack of shared rewards

- Lack of drive and urgency

- Insufficient or ineffective processes.

- Vague or shifting team goals.

- More emphasis on personal versus team goals.

- Emphasis on career status.

Improve Your Team's Engagement

If you find the concept interesting, check out **The FIVE Dysfunctions of a TEAM**, a leadership fable by *Patrick Lencioni*. Lencioni developed The Five Behaviors® Model to empower teams to rethink their approach to teamwork and shape new behaviours – taking teams and their organizations to the next level.

We would love to know how you feel your team compares to this model and if you can see the advantages to teamwork and effectiveness by adopting The Five Behaviors®. The training is a one-day or three-day workshop, divided into half days to allow team practice between sessions. That is

ideal since some organizations prefer something shorter and more focused, while others see the benefit of delving into the detail.

Considering the changing workplace and combination of in-person, remote or hybrid versions, teamwork has likely never been more challenging. In addition, the world around us has been full of negative information over the past few years, and the outcome can be demotivated and angry employees. The organizations that prioritize teamwork and recognize the need for a strong culture are the organizations that will lead the way in their respective industries.

> *"If you can get all the people in an organization rowing in the same direction, one can dominate any industry, any market, against any competition, at any time".*
> *— Patrick Lencioni.*

How to Improve Clarity

Improving clarity in a team is important for effective communication and collaboration.

Here are some tips to improve clarity on a team:

1. Set clear expectations: Make sure team members know what is expected of them regarding goals, deadlines, and quality of work. Be specific and provide examples to ensure everyone understands. From time to time you may have to "Inspect what you Expect".

2. Clarify roles and responsibilities: Clearly define each team member's role and responsibilities, including who is responsible for what tasks and decisions. This will help avoid confusion and prevent tasks from falling through the cracks.

3. Use clear and concise language: Use simple language and avoid jargon or technical terms that everyone on the team might not understand. Be concise and avoid rambling or repeating information unnecessarily.

4. Encourage questions and feedback: Encourage team members to ask questions and provide feedback to ensure they understand the information and instructions provided. Create a safe space for team members to ask for clarification without fear of judgment or retribution.

5. Use visuals: Use diagrams, charts, and other visual aids to help explain complex ideas and concepts. This can be especially helpful for team members who may be visual learners.

6. Repeat important information: To ensure everyone is on the same page, such as deadlines or key objectives. This can help prevent miscommunication and ensure everyone is working towards the same goals.

7. Follow up: Follow up with team members to ensure they understand the information and instructions provided. Check-in regularly to ensure everyone is on track and address any confusion or questions ("Inspect what you Expect").

8. Formalize important communication so all recipients receive the same message.

By implementing these tips, you can improve clarity on your team and foster effective communication and collaboration.

Gaining Commitment

Commitment to a team is important for achieving shared goals and driving success. It begins by setting commitments that every team member understands and is willing to embrace. The team needs to feel a sense of ownership and not feel they work in individual silos; one must be willing to support another when needed.

Opportunities for input are important and should be encouraged to foster a sense of collaboration and teamwork, as well as increase the level of commitment. The "why" behind each project, decision, or initiative is important in gaining commitment, and a good team is never a group of "robots" who do as they are told.

The more rewards and recognition that can be offered, the better. This will foster a culture of positive attitudes, teamwork, and willingness to pursue progress. While individuals can be singled out, the ideal is the first recognized team. The leader can recognize exceptional team members within the group but not singled out at every opportunity. As important as recognition is, when the same team member receives it most, it can negatively affect and contribute to resentment.

Leadership must communicate often and consistently so team members are informed about progress toward a common goal and any changes or challenges that may arise. This can help increase transparency and build trust, which can, in turn, increase commitment.

Leadership must lead by example and model the behaviour expected. This will build trust and respect, and if the leader is vulnerable and asks for input and support when issues arise, a commitment by the team can increase.

This fosters a positive team culture where team members feel valued, important, supported and part of the bigger picture.

Holding One Another, and Ourselves, Accountable

Holding a team accountable is important for achieving shared goals and ensuring everyone meets expectations. Accountability cannot occur without clarity and commitment; these are important priorities.

Typically, one thinks it is always up to leadership to address accountability. It is not.

An ideal team can hold one another accountable based on their commitments. In team dynamics, individuals do not, and cannot, work alone.

Here are some tips to help hold a team accountable:

1. Set clear expectations: Clearly define expectations for each team member, including goals, deadlines, and quality of work. Be specific and provide examples to ensure everyone understands what is expected of them. Team members must share their contribution toward this common goal, so others know and understand the accountability factor.

2. "Inspect what you expect."

3. Create a system for tracking progress: Create a system for tracking progress towards shared goals and individual tasks. This can help identify any areas where team members may be falling behind and provide an opportunity to make necessary adjustments.

4. Keep it Simple

5. Provide regular feedback: Provide regular feedback to team members on their

progress towards shared goals and individual tasks. This can help identify areas where they may need to improve and provide guidance on how to do so. Team members should also provide feedback to each other so that issues or obstacles can be addressed as a team, and actions agreed upon from there.

> *"The time is always right to do what is right"*
> *— Martin Luther King*

6. Hold regular check-ins: Regular check-ins with team members to discuss progress, challenges, and next steps. This can help keep everyone accountable and ensure everyone is on the same page.

7. Unity requires accountability.

8. Hold team members responsible for their actions: Hold team members responsible for their actions and follow through on consequences when expectations are not achieved. This can help establish accountability and ensure everyone works towards the same goals. Team members should also be encouraged to offer support

when needed so no one is blamed or feels bad if falling short due to unforeseen circumstances out of their control or skill set.

9. Teamwork makes the dreamwork.

10. Encourage transparency: Encourage team members to be transparent about their progress towards shared goals and individual tasks. This can help identify any potential issues early on and provide an opportunity to address them before they become bigger problems.

11. Transparency increases credibility.

12. Celebrate successes: Recognize team members who are meeting or exceeding expectations. This can help increase motivation and morale and reinforce the importance of meeting expectations.

13. Take the time to celebrate even the small wins.

By implementing these tips, you can help hold your team accountable and ensure everyone is working towards shared goals productively and efficiently.

The X5 Management Team

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Chapter Six

Strategy Five — Plan to Grow Your People

Start with Goal Setting

As reviewed in Chapter One, goals play a crucial role in helping a business grow, including the people in the business. Goals ensure direction and focus. Setting goals for people's growth will give the team a sense of purpose and help align the efforts of the entire team toward a common goal.

Business cannot grow without the right people in place, and if it does, it will not be sustainable, and the business will be "riding the wave." When that wave crashes and breaks, so will the business. Growing people within a business, especially a successful growing business, is not easy. Motivation will ensure everyone knows what direction to go, what is expected, and when they are doing a good job.

When a business has goals, they need to be specific so they can be measured and evaluated. Everyone

on the team needs to understand how to get from Point A to Point B and how long it should take.

An organization may have goals that decision-makers or the ownership group develop, and each employee must have goals too. That is the only way employees know if they are on track, and if not, they accept feedback and direction to change or improve their efforts or performance.

Goals must also include available resources and the ideal ones to strive toward. Businesses often continue to conduct business and pursue processes because "we have always done it this way," which is not productive or efficient in a growing organization. Employees are more likely to be motivated when they understand resources are limited today, but embracing technology and systems is the future goal.

Setting and achieving goals is critical for a business to grow and thrive, including the people side of the business. By providing direction, motivating employees, improving performance, prioritizing resources, and evaluating success, goals can help a business to achieve a desired outcome.

Succession Planning for Success

Effective succession planning needs to be part of an organization's culture. Everyone in the organization needs to believe it is best for ongoing organizational growth, employee professional growth, and to enable an organization to promote from within. There is a direct correlation between succession planning and corporate performance, lower employee turnover and improved organizational familiarity and knowledge.

Many organizations do not plan for future growth or turnover; therefore, employees are hired externally.

We worked with an organization that had aggressive plans for expansion in a growing industry, but with a weak corporate culture that did not involve an investment in training, employee recognition or succession planning, the turnover was very high. Short staffing was an ongoing issue, making expansion not only difficult but unrealistic. The priority was not to pursue mass hiring campaigns while the door was revolving, but to put a strategy in place that addressed important culture initiatives. Resources were invested in training programs, a recognition program was implemented, and succession planning became a

focus at all levels. Turnover dropped significantly, internal advancement became a reality, and the organization gained a reputation within the industry as an employer of choice. Expansion was facilitated, and the organization doubled in size within 5 years.

Although a balance of internal promotions and external hires to ensure the best individual is hired for the role, the ideal ratio is 80% internal and 20% external.

An organization needs to predict the difference between replacement hiring and hiring for strategic growth. Who will fill the next seat at the table?

Start at the Basics

Succession should be discussed at the hiring interview. There are many positions that candidates apply for that are a job, not necessarily a career. In a competitive environment, wouldn't it be ideal if job applicants left the interview realizing there was an opportunity for growth, especially if there were employer-led training, certification, and workshops?

Helping employees advance may involve a 3-4-year investment, or more employees are encouraged early to set their sites on the next level. A formal internal mentoring program is ideal for helping junior candidates tap into the knowledge of leaders 2 or 3 levels above theirs. Mentoring sessions should be regularly scheduled and consistent to share and exchange perspectives in a question-based discussion.

Employee exposure is key to effective succession planning. It is common for junior employees to admit they do not know what happens in the executive offices. Inviting aspiring employees to witness "a day in the life of" can be an eye-opener and motivate advancement aspirations.

Each manager should be held accountable for succession planning within their department, and upcoming job openings should be posted internally before considering an external recruiter. Annual (or bi-annual or quarterly) performance appraisals should include a discussion on advancement goals and feelings of readiness.

Care must be given that internal departments do not compete for talent but rather collaborate. Employees may have a background in a role outside their current scope that can lend eligibility

to a new role in a different department. Leadership cannot compete internally for eligible candidates. Ideally, there is a protocol to offer a candidate a recommendation to move to a more advanced role, in a different department, based on experience, ambition and attitude.

Progressive organizations might consider implementing employee assistance programs for recognized certification or degree programs. These can be based on the successful completion of said education program before reimbursing a portion, or all of it, to the employee.

Organizations must only look within to gauge their success with succession planning versus external hiring. Sometimes it is hard to know where to begin; an outside perspective from a specialized business consultant can help through tailored coaching or mentoring strategies that involve active learning, supervision of special assignments or customized training.

> *According to a Gallup poll, employee engagement reached a 20-year high early in 2020 at 38%. Once the pandemic hit, employee engagement dropped to 31% and has not recovered. Gallup measured "engagement" as the employees who were highly involved, enthusiastic, and committed to their workplace.*

It is not surprising employee turnover is at record highs in many organizations. For those who do not actively pursue or measure employee engagement, the likelihood of experiencing short staffing is high. That also holds for the challenges of promoting from within.

Growing leaders will ensure engagement and morale for ambitious employees increase, thus decreasing turnover and the need to hire recruiters consistently.

Key Components for Successful Succession Planning are:

- Communicate the opportunity for advancement during the job interview and again early on after hiring.

- Develop a 3- 4-year phased program as an employee steppingstone for future growth.

- Develop an effective feedback culture through one-on-one performance reviews that are kept relevant and timely (we recommend semi-annually).

- Create a mentorship program allowing aspiring employees to partner 2-levels up, ideally outside their current department.

- Allow opportunities for further education, internally or externally, by sponsoring and encouraging professional growth.

- Ensure there are opportunities for additional exposure to higher-level decision-making through invitations to meetings, conferences, etc.

- Establish an encouraging environment for open-door communication so employees can approach leaders to enquire about the advancement.

- Implement a consistent internal job posting protocol encouraging all interested and qualified candidates to apply.

There is a great deal to consider for an organization that may not have an effective succession planning strategy and, at times, finds itself short in key roles.

The time to evaluate the process is not when staffing is short of key employees but when organizational growth is anticipated, and staffing is ideal.

How We Help

The team at X5 Management wants to learn about your business concerns that prevent you from maximizing your business strengths and potential.

We listen to you and discover how best to support your desired outcomes to improve your business and team in any economy.

Every leader needs added support and guidance from time to time. X5 has coaching options to help you and your team grow. Our team will guide, teach and mentor your leadership team, managers or supervisors. The role of our coaches is to enhance the ongoing performance of the leader.

Our programs are tailored specifically to your individual or business needs. Our solutions include tailored Training Solutions for your entire team, ensuring everyone is aligned and confident in impacting your company's success.
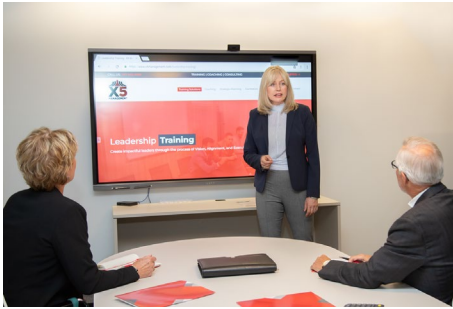
Our Training Solutions are also eligible for the Canada-Alberta Job Grant, meaning you only pay one-third of the cost of training when utilizing the grant.

Find out more at **www.x5management.com/cajg/**

Chapter Conclusion by Amar Randhawa
COO of Durabuilt Windows and Doors

Throughout our journey, we have learned growing and developing our people is crucial for a successful business. About 15 years ago, when our company started to grow, we had no plans to develop our leaders. We got to the point where we were struggling with several aspects of our operations, from production to service, and customer satisfaction was declining. Not knowing what to do, I went to Chapters, picked up a book, and started reading. For over two years, I would read a chapter or two over the weekend, create a small

presentation on my learnings – maybe five to ten slides – and then present it to the team the following Tuesday.

We started to see changes, and that's when we realized how important it is to grow your team along with the business. Since that day, we have invited speakers to our annual sales conferences and meetings. We started focusing even more on training and development. We have programs like TEC Insight and X5 Management providing training for our emerging leaders. We now refer to it as a "leadership pipeline." Just as we have a sales pipeline, we want to make sure we're developing a leadership pipeline, and we understand that true leadership development can only be achieved by investing in the growth and education of our team members.

Developing a green business and fostering leadership go hand in hand. You can't do one without the other. We frequently discuss this internally, recognizing that one of our biggest strengths lies in the ability to grow our leaders faster than our competitors. Growing our team is vital to the overall success of our business.

Our primary goal is to grow more leaders and develop a robust leadership pipeline. While we have company goals that align with our values, the key focus remains on succession planning and growing more leaders in the company.

Lately, we started using a phrase as leaders, "If you're not replaceable, you're not promotable." By developing and growing their team members to take on their roles, our leaders can progress more rapidly. We have created a lot of new positions in the company with the intention to promote internally. When you have leaders developed within your department, that's when you get to the next level. Our primary goal for the past several years has been to nurture our leadership pipeline, grow our leaders, and execute proper succession planning.

We instill consistency by setting clear expectations. We learned this lesson when one of our managers conducted a meeting with their team and asked what each team member's agreed-upon focus was, and everyone had a different response. This experience taught us the importance of effective communication and setting clear expectations that everyone on the team can understand.

Monitoring progress and providing constructive feedback on a regular basis, as well as leading by example by showing consistent actions, has made a huge impact in our communication and consistency at Durabuilt. We understand we all have a preferred communication style, be it direct, more subtle, structured, and so on. Because of this, we strive to communicate effectively to all preferred styles within our organization.

We attribute our impressive tenure to a very supportive work environment. A lot of times, in the early stages, when we see a person growing and taking on new challenges, we encourage them to take initiative and make decisions. We assure them that if the decision is wrong, we will take ownership, and if the decision is right, they will get recognition.

We have a few implemented strategies to keep the team engaged. Our leaders conduct numerous interviews to gain insights. During these interviews, we often ask individuals questions such as why they would consider leaving Durabuilt, if they feel challenged enough in their role, if they believe they have been provided with opportunities to grow,

and what support we could provide. This helps us understand where we need to adjust and set their focus points for growth,

At the beginning of every year, all leaders in our organization will sit down and set seven to ten priorities or goals we want to reach. The priorities will be assigned to different departments and leaders, and we will complete regular follow-ups to discuss the successes and challenges within those goals. This way, we can create a plan and provide the necessary support to get the goals back on track.

Our success in challenging times can be attributed to our agility and flexibility. If there's a new product line that we want to introduce, or a new system that we want to bring on, we move on those things quickly. If we see there's a great opportunity, we don't sit on it for months; sometimes, a decision is made within hours.

Innovation is another one. Organizations need to encourage a culture of innovation. We always look for what's new and different. Sometimes it's a product, and other times it's the customer experience, equipment, or technology. Technology is changing rapidly, and AI is creating a digital

transformation. Tools such as ChatGPT are here, and we embrace the transformations and continuously explore new innovative solutions.

The last contributor to our success is our supplier partners. We're a relationship company. We like to ensure our suppliers are involved, understanding what their challenges are and work with them, not dictate to them. We want to collaborate and work together and help them innovate their products and their processes to improve. If we identify areas where they can improve, we offer our expertise and share our own practices. Likewise, we remain open to adopting their suggestions when they present better ideas. We view our relationships with suppliers as a partnership based on mutual growth.

Recently, I was going around the company and sharing our history with everyone, starting from the days of doing our quotes manually. I still have one price book saved in my office in my memory cabinet, reminding me of our journey. I also keep a collection of all my business cards; my first was Customer Service, then Production Manager, then General Manager, and now Chief Operating Officer.

I love sharing these experiences with the team to show them the possibilities of advancement and success.

Chapter Seven
Wisdom and Experience

A Story From Angela Santiago, CEO and Owner

Witnessing my parents' entrepreneurial spirit encouraged me to go to post-secondary school back in Edmonton and get my business diploma and a political science degree with a minor in history. When I graduated from the University of Alberta, my dad had another business idea, this time about small potatoes. It is heartwarming because it stemmed from his childhood memories of growing up in the Netherlands and picking the little potatoes off the field.

The funny thing is the little potatoes were delicious. But they were usually left behind in the field by harvesters and were plowed in after. But these were the ones that were picked up by the locals and cooked at home.

The magic happened when that memory of the little potatoes being picked after harvest collided with him in a small truck stop cafe outside Edmonton. When my dad heard some Dutch potato farmers talking, my dad and I were doing taping and drywall together while I was putting myself through school. The magical thing was the Dutch farmers were speaking Frisian, and Frisian is a language spoken in the Northern part of the Netherlands that maybe only a few million people globally speak! It was the stars aligning.

And my dad overheard these gentlemen talking about little potatoes, and he's like, "What?" And that's where the big idea for little potatoes came from. He was so excited he came to the job that we were at and said, "Hey, I overheard these guys talking about little potatoes. I remember them as my youth. And I wonder if there's a business idea around this."

As a typical 20-year-old, I rolled my eyes ("Here we go again.") He said, "Why don't you give me a hand helping me start this?" And so, I very reluctantly did. I certainly did not see a future in agriculture. And by no means in potatoes because who does that for a career?

Going back to my roots as a young 20-something, obviously, with that age, a part of you that wants to go off and conquer the world, but there's also a part of you at that age that has no clue how you're going to do that, or how you're going to contribute to the world.

It's such an interesting age to make such big decisions. And I have learned everything is fluid, even advising my kids. What you decide now might not be what you do 15, 20 years from now. It's important, but it's not the end all.

My journey into being a leader came from the fact that I didn't see everything that I was or was to become at that age.

The great thing is that all along the way, there were a lot of key people, including my parents and particularly my dad, who saw my ability to lead and to take a company and do something with it.

Leadership came organically through people pushing and encouraging me and seeing something in me that I probably didn't see myself.

And that's a very important lesson I pass on to my kids. I see them now for things they're good at and don't see in themselves yet. But it wasn't overnight, and I didn't wake up one day and see myself as the CEO. Anybody that started a company from scratch knows you don't even know you're leading in the moment because you're building the company. My leadership evolved with a lot of encouragement and support.

I went from outsider to leader. That was a huge challenge and journey. I was viewed as an outsider because I didn't have a potato background, wasn't in the industry, had zero ag background, and was coming into a very traditional old way of doing things. But being an outsider had its advantages as well.

I was discounted for years. Although as frustrating as that can be, they didn't pay attention to me. That was great because then I could muddle around and build a company under the radar.

Like every entrepreneur, it's the financing of a start-up and banks going, "mm, I don't know..." And being a female in a male-dominated traditional business is changing, but 26 years ago, I was often the only woman in a room.

How do you successfully juggle it all? You don't, and I didn't. I have an amazing partner, Frank, who has been my biggest cheerleader and support to help balance the family. It's a team effort. The other big challenge was juggling the personal side, becoming a new wife, having four kids, and trying to grow a business.

Those were some of the most difficult years of my life. And often, you end the day going, and I wasn't doing anything very well, not being a very attentive and present mom, business wasn't buttoned down and not feeling like an attentive wife either.

So, those were real challenges for me initially, growing a business and being an entrepreneur. And because we all know when you run your own business, it doesn't turn off. You don't get to lock it up at the end of the day; you take it all home.

I think the other piece in the business part would be we were trying to build a new category within a

very traditional one. For some retailers, it was easy. They saw it right away. For others, it was too big of a change, and it took a long time to get some retailers on board, but that's also the fun part of innovation: doing that work, getting people over the hump, and getting them to see something new.

For me, the greatest achievement wouldn't make the front-page news. For me, it's building strong, trusted, loyal relationships internally and externally. Also, within the industry, we've had internal growers who have been with us from the beginning. I've had retailers with us from the beginning, and some of the same buyers are still with us. Those are the "behind the scenes" stuff that doesn't make the front-page news— concerning some of the big rewards of growing a business. I would say it's all the incredible learnings I've had, a lot of stuff you don't get in a textbook or you can't get in a degree, and the willingness to be able to learn is so powerful.

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

Chapter Eight
A Personal Story (Mike Mack)

IS YOUR "WHY" COMPELLING?

We all have things we have done and have some things left undone. Ask yourself: "Why have I started and completed certain goals, actions, or tasks?" Now ask the next question: "Why have I not yet completed certain goals, actions, or tasks?"

I remember listening to some great audio material from Tony Robbins over 20+ years ago. He said, "When setting a goal or completing a task, your WHY must be the most compelling." That message continues to stick with me today, and I constantly must remind myself of this. Sometimes daily!

During these past number of years, I had the good fortune of being able to support and coach many people in several different businesses and industries. One session focused on sales performance coaching, then crossed over to

personal client goals, including health and fitness improvements.

The person I was working with acknowledged that the goals and activities regarding work and business were completed and on track. However, the personal goals that were set, specific to health and fitness, were not even close to being on track. My comment was, "Your WHY must be more compelling."

His response hit me: "I have to write that down because you consistently say that to me." He said, "I need to make my WHY more compelling!"

> *"He who has a why to live can bear almost any how."*
> *— Friedrich Nietzsche*

Mike's WHY story:

In 2005, a year before the fall 2006 launch of X5 Management, it all started with a desire not to be caught up in the bureaucracy of a job that didn't give me joy. I always wanted to make a difference, and the last job before I started X5 didn't do that for me.

If I was going to help people, I wanted lots of variety. No two days would be the same. I didn't necessarily want to work in one industry.

I have always been quite gifted and comfortable talking and speaking to others. After several years in Toastmasters, I gained even more confidence speaking in front of an audience. I also got a lot of joy and gratification from helping people, especially those who wanted to grow and push themselves. It gave me a real sense of purpose and satisfaction.

Starting a business is not for the 'faint of heart'; it took guts and belief that I could do it. I believed that I could and wanted to make it a solid effort.

Insight

If you are like me and have decided to start a business or elevate your career, you need a strong internal belief system to get you through challenging times, as there will be many.

I knew that I had:

- Work Ethic.

- People in the community could help me, but I had to ask.

- Focus

- Discipline

- The willingness to celebrate the small wins. (There are more of those than you think).

- Manage my Emotional Intelligence. (Don't get too high or too low).

- If it's going to be, it is up to me. Own it!!

The Story Behind the Name, X5 Management

It's funny reflecting on the naming of X5 Management back in the fall of 2006. (That journey started months before without expert advice or marketing wisdom).

There were several reasons for the name.

First, the branding started with a lowercase x5. The intent initially was that my business would help companies in multiple ways. Thus the x. It was

intended to be a multiplier effect. "We can help you get where you want to go faster."

I also wanted to think that we could be the x-factor for a business. Based on Google, the definition of x-factor is "a noteworthy special talent or quality. A variable in each situation that could have the most significant impact on the outcome".

For the record, the lower-case x was replaced with a capital X after year two, as I was frustrated that many people called it 'times 5' Management and not X5 Management. The change to X5 Management from a branding perspective was a good one, in my opinion, and has evolved over the years.

Many refer to us as X5 and often don't say X5 Management. I love it as it suggests that the brand and name have caught on, at least within the Edmonton business community.

One of the earlier versions of the brand and logo depicted an abstract steep mountain elevation. (The original logo was branded in black and gold and evolved to black and white). Our tagline at the

time was "Helping you to the Next Level." That worked for a while but didn't clearly define what we did.

In 2018, we further tweaked the brand, logo, and tagline. It was a long process, but it helped our team and me articulate what we do. X5 is in the business to "Align Leaders and Teams to Achieve." We are in the people business, and everything we do involves people. Great things usually happen for our valued clients when we can help teams become aligned or better aligned. That is what we get up in the morning to do every day!!!

The five arrows on the logo gave the brand a bolder look and again signified the alignment of a team. This feature, along with moving from a gold and black logo/brand to a red, black, and white was a big change that I continue to be very proud of today.

Finally, there were five things that X5 would offer our new clients.

While the five things may not have been thoroughly thought-out then, I knew I could generate revenue from each, which would help mitigate risk with one service.

- Training
- Coaching
- Facilitation (Planning meetings and the like)
- Public Speaking
- Strategic Partner referrals

After three to four years in the business with major highs and successes, to major lows and challenging business and life stressors, the core of those five services emerged as the most ideal for X5 and still exists today.

Training – Coaching – Consulting (Including Strategic Planning)

Ultimately the decision to focus on the above three key service offerings came down to the fact that we couldn't be 'all things to all people.' Training-Coaching-Consulting became a fluid offer whereby we could do any of them at a given time with a client.

This versatility has served us well, and our clients have appreciated the scope of our holistic service offering.

As the founder of X5 Management, I have always deeply cared about what my brand represents. After all, in the early days, it was me and my brand, X5. I desire to be Liked, Respected, and Trusted, and I expected the same for the X5 brand. I am a relationship guy and care about people!

Who do we help?

While our clients are businesses or organizations, and of course, X5 has a corporate relationship with many businesses, it is our deeper connections with many terrific people within those organizations. I treasure that and value these relationships a great deal. As many know, I believe in "Relationships for Keeps."

A valued client of X5 Management is typically a privately held business that we can work with and communicate with the decision-makers and leadership team. The organizational size may vary from 20 to 1000+ employees.

Our number one priority is to serve the best interest of the organization. It is never in the best interest of our organization. We like to be the GUIDE, not the HERO. We want our clients to look good, and I love seeing clients in the news or on social media. It's very gratifying when we see them in a great place; if we played a very small part in that, it's what we get up in the morning to do.

Why Corporate Responsibility is Important to Me.

With X5's ongoing business success, it continues to be vitally important that we give back to our community and continue to be good corporate citizens. We have done that with financial donations, volunteering of time, or providing in-kind services for non-profit organizations in Edmonton with which we have a close connection.

We can also provide our skills and expertise, and the organization isn't required to pay for those services. We have found this to be very gratifying.

An example included a great Edmonton-based community organization, Bissell Centre. "Everything Bissell Centre does is grounded in its vision of eliminating poverty." After meeting their CEO, Gary St. Amand, and hearing a presentation

he delivered in the fall of 2016, I was moved by what the organization did for our community. I knew that I wanted X5 to get involved. I met with Gary and offered leadership training services over a few years, and this was offered at no cost to Bissell Centre. Our small way of giving back!

Another commitment that X5 made in late 2022 was funding a scholarship for entrepreneurial students through Junior Achievement Northern Alberta and Northwest Territories in partnership with The Foundation for the Advancement of Entrepreneurship.

What I have learned in 17+ years of changing times

Fortunately, I have learned many, many things over the years.

My top five learnings that still hold today:

- Relationships matter in business and life. They always have and always will.

- One can't do everything. Relying on a great team and outside wisdom and advice has gotten easy over time. The more I seek counsel, the stronger X5 becomes, and we

can add greater value to our clients. I find the right "who's" to support me.

- Leave nothing to chance. A long-term client may not always be our client. Continually add value to them, and never assume what you did last year is enough for the year ahead.

- Recharge and rest. I love to work. (Likely deemed a passionate workaholic) My wife Bonita has been a tremendous support to me, and when we plan a vacation 3 to 12 months out, at the time, I may think how much work we have to do, but when the vacation days arrive, it becomes a blessing that we take the time to relax and recharge. I have found that I always return from a vacation wiser and more creative.

- Embrace change and maintain momentum. When the winds of change start blowing (FYI …. they never stop blowing), go with it and leverage that momentum. The spring of 2020 and the lockdowns of -in-person meetings due to COVID-19 forced X5 to pivot to a virtual world that ended up serving us well. We upgraded the lighting in our home offices and purchased better

cameras, and enhanced internet connections.

Whether you want to:

- Increase revenue for your business.

- Retain more employees.

- Nurture a new or existing relationship.

- Open an office in another location.

Your WHY must be compelling if you truly want to complete, accomplish, or create something.

Sometimes the **WHY** is obvious. "I must fill my car with gas because it is empty." That is a pretty compelling **WHY**. Sometimes your **WHY** may be less compelling. "I should have those one-one meetings with my team, but it has been a long week, and I can do it next week." Only you can find your **WHY**. My advice is never to stop searching!

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Chapter Nine
A Personal Story (Kris Schinke)

Understanding the 6 Recommended Traits of an Entrepreneur

I am sharing some excerpts from my published book, one that is heartfelt and involved interviewing my entrepreneurial father who gives advice to entrepreneurs on growing a successful small business, as he did. He may have retired over 12-years ago, however his advice still holds true today!

Entrepreneurs across all different industries tend to have certain traits in common. Often, these common traits of an entrepreneur set them on the path to entrepreneurship and help them succeed. Traits are specific to an individual's beliefs and characteristics, so the list could be endless and different for everyone.

Take a read through these six recommended traits of an entrepreneur. Then, ask yourself if any of the traits surprised you. Did any of them stand out as

areas you want to work on? Share with us in the comments once you have read the post!

Purposeful

According to my father, Wolfgang, no one accidentally fulfills their dreams.

If you want something badly enough:

- Do the research.

- Read books.

- Get to know people who can help, network, and make personal connections.

- Find a mentor or a coach who can help give you direction and feedback, and you can share ideas with them.

- Learn as much as you can before you begin so you can create a detailed plan.

- Keep good records to refer back to and make changes as required.

- Make decisions from your future customer's perspective, not your own.

- Be sure to realize you will have to work long hours and not punch a time clock.

In the end, however, the rewards are worth it. Before starting your business, adopt a philosophy of looking outside your comfort zone for new ideas. Learn from the old, as they say.

> *Wolfgang says, "I looked at the most successful facilities in my industry and contacted as many successful people within the industry as I could to get ideas. It was a good way to build bridges and found that most professionals were receptive."*

Passion

As the quote goes,

> *"A dream written with a date becomes a goal. A goal broken down into steps becomes a plan. A plan backed by action becomes reality."*
> *— unknown.*

A plan that is thought about, dreamed about, talked about, and researched becomes a passion. Passion becomes an emotion, and intense emotion can be compared to a fever. This might become an

obsession that creates a sense of urgency to get the plan underway.

Wolfgang dreamt about owning an equestrian establishment since he was a young boy. Many years later, he started, and the business took several years to materialize. All the while, he did not lose sight of his dream.

Not all successful entrepreneurs are pursuing their passions. But it is likely their business has become a passion. And this passion is one of the most beneficial traits of an entrepreneur.

Planning

I started my book with advice from my entrepreneurial father, who says, *"Start with a plan; without a plan, you have nothing. A plan might be a dream, a goal, or a vision, but it is something you would like to achieve in the future."* He says, *"Before you finalize your plan, be sure to decide where you want to go, what you want to*

achieve, why you want to achieve it, and when you want to get started."

Of course, "how" is the biggest question, but you can't answer that until a plan is decided. Share the plan with many others as possible to make it a reality**.**

This can help with business planning; pride is a good motivator. When others know about the plan, there is a good possibility they can offer suggestions and even make financial contributions. Wolfgang recruited a partner when he realized his plan was too time-consuming and expensive to pursue alone.

Inner Drive

Successful entrepreneurs mean more than starting a new venture every other day. It means the right attitude towards a business and the determination and grit to succeed.

Successful entrepreneurs have a strong inner drive that helps them succeed. An entrepreneur is excited by the prospect of work. They have a strong will and overcome obstacles without becoming discouraged. They set big goals for

themselves, but it is also safe to say they are committed to achieving them despite countless setbacks. Successful entrepreneurs have strong self-confidence and a healthy opinion of their skills and abilities. Their personality is assertive and strong. They are focused and decisive with the issues at hand.

This is what makes them different from the rest.

Resourcefulness, willingness to improvise, and a strong determination to succeed make an entrepreneur successful.

Wolfgang worked full-time at another job for the first eight years after starting his equestrian business. He knew he could eventually quit his day job, but not before his new company was established. All his spare time, including vacation time, was invested in his business, but he loved it and was never tired!

Flexibility

An entrepreneur always seeks innovations and ideas to emerge as a winner. **They constantly reinvent themselves and think of better ways to**

run a business, and improvise on products and services offered.

Another essential quality of a successful entrepreneur is openness to adopting change. Being headstrong and stubborn when choosing other options can have negative consequences. Change is the only thing constant in business, and it isn't easy to profit from old methods that may not work anymore.

Although Wolfgang started his business as a children's summer equestrian camp, it didn't take long to realize keeping horses all year round was costly. He became innovative to expand the business by offering spring and fall weekend camps and adult riding during the winter. Eventually, he provided over twelve horse-related services to equestrians of all ages. This innovation is one of the most useful traits of an entrepreneur in running their business.

Motivation

Competition should not scare an entrepreneur. Instead, a successful entrepreneur should thrive on it by staying highly motivated and engaged. When a person is motivated, they can do justice to their line of work.

Accepting rejection or constructive criticism can also help with success by pointing out where change might be needed. Asking for, and accepting feedback, is a good way of improving. **Know your competitors inside out but do not copy or compare; instead, find your competitive advantage.**

Wolfgang's motivation came from doing what he loved and wanting to be recognized for owning a well-known equestrian facility renowned internationally, and he did accomplish that!

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Conclusion

Our organization, X5 Management, was founded in 2006. We're proud of that. We always say we're in the people business. That's why we get up in the morning: serve organizations to help them by aligning leaders and teams to achieve. The conversation around this book that we collaborated on over the last year, ***How to Stop the Revolving Door***, discusses the importance of people in your business. The Revolving Door is preventable, although you can't eliminate it, and some turnover is natural. There's a big difference between having a 5% turnover and a 40% turnover. Again, for us being in the business of helping organizations become better, more effective, we felt that our background and our experience, and some of the tools and techniques that we've used over time could be put that to paper and become a presentable tool. Our book is intended to provide that to our clients, prospective clients, and anyone in the business.

We always say we can work with anyone that has people. The reality is every organization, big and small, has people. That's incredibly important, and that became the catalyst. Writing a book isn't easy, but it has become a passion. We're proud to collaborate. We have similar styles with different perspectives. We've known each other a long time, so collaborating on this book is something I'm proud of at the same time, and I welcome Kris to chime in on maybe her views of her passion behind the book as well.

Mike's the ideas person, and we always chuckle with each other. Mike has the ideas, and I tend to execute or implement them. When Mike first suggested it, I thought, again, a great idea because we have a lot of experience collectively, and we love to collaborate. We have a lot of experience in business. We hear straight from the horse's mouth, so to speak, what some of the common workplace issues and challenges are. We thought of putting something together as a tool, and the idea is that that tool serves an entire organization, not one leadership person. We distribute quite a few books during our training, and we always find that a group with the same material makes a good topic for group conversation. And we thought, again, this with the strategies we're offering that can

positively impact employees, and ultimately when that happens, the business results improve, it would be well received.

Utilizing This Book to Improve Your Organization

Sharing our experience and knowledge and solving the common problems we see on paper is rewarding. Our passion comes in here, and we've written several books. It's very rewarding because when you're an author, people stand back and say, "Wow." So many people want to write a book, and many have it as a goal or a dream for many years, and many don't even get around to it. It's stepping up to the plate and showing people that if you put your mind to it and you have something to share that's helpful for others, then lead by example and go ahead and do it.

The other aspect we take pride in is simplifying something that may seem complicated. There are a hundred things you could do to improve retention. Still, we're starting with our five strategies, and we'll have some anecdotes within the book and stories, to make it a readable, digestible takeaway. You could argue that great retention strategies are not rocket science, but we must all remember the simple things. The little things make all the

difference. We want to capture that so that it's simple enough once you understand it, but it's hard to do. It's hard to sustain it as well. When you put that to paper and refer to it, our strategy of writing this book and co-authoring it together, which we're both excited about, is not a money maker in writing the book. We can support clients, and if they utilize our services, wonderful.

But we're in the business of helping businesses and people. That's what we do. With an organization like X5 Management in our primary market of Edmonton, Alberta, and by early 2024, having five published books in the marketplace that we've happily contributed to over time between the two of us, there's a lot of pride and experience that we felt was worthy of sharing. We hope that some leaders pick up on a tip that can make a difference for them. But that ROI is never measured. That's not why we wrote this book. As much as anything, we wrote the book because we're helping business leaders.

Your Passion is Your Strength

We wrapped up the book with a chapter about our personal experience following a passion. One thing that we've realized is we always feel bad for people

who don't have a passion. It doesn't mean you wake up one day and you have it. Sometimes, you fall into a business or a particular role, or you've had a varied career, and you realize that you've fallen into something that you're good at, and that becomes a passion. It was a good way to wrap up the book and demonstrate to readers that if you can look around you and recognize where your passion is, it's probably in an area of strength. You may not have tapped into it. If you can tap into it, you'll be very successful at it.

We're in the people business, and it does become a true calling. It is a calling, and some days can be stressful. The stress in our business is our client's stress, and the challenges they're dealing with. That's difficult, and we're in the solution space, so we need to be able to figure out a solution. How do we collaborate? How do we think win-win? How do we improve the organization and the experience of the employees and the customers? Not an easy task, but that's what we get up in the morning to do.

Our Encouragement to You

There are lots of great books on the marketplace. Take this book, for example. It's designed to be a

simple read that you can get through and depends on how fast you read, two and a half, three hours, that you take something away and, more importantly, implement it. You execute an idea or validate, "Hey, we're already doing this idea, and it's working." That's the takeaway. And, of course, we're in the business of supporting organizations. If we can be of benefit, X5 would welcome the opportunity to support your business. That's our purpose for getting up in the morning, because it's a privilege for us to help organizations that want to improve their business. That's something we really care about.

Our vision, when the book is distributed, is hopefully, the reader will have a copy full of highlighted notes and post-it notes for future reference because, like anything else, you can't read something once and be an expert in it. This becomes a guide. In some cases, if that particular strategy has already been tapped into, hopefully, readers will ask themselves, how can I learn more or improve in this particular area?

We thank our readers in advance; hopefully, they will gain valuable takeaways. We want to get this in the hands of as many leaders, managers, business owners, supervisors, and recruiting firms as

possible, whoever that may be. Those are the key items that we want to look at.

Give us any feedback on the book, and maybe we'll hear some success stories down the road of what you had as a takeaway and how that potentially benefited your organization or your culture, ultimately improving your retention and key employees.

You can't face today's challenges with yesterday's knowledge

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

About the Authors

PRESIDENT, X5 Management
Mike Mack

> *For Mike, every relationship is built on Like, Respect and Trust.*

Mike Mack is a sought-after Leadership Coach, Consultant, Trainer, and Facilitator. He has been helping business teams maximize their potential since 2006 with the use of tailored consulting and training programs, along with coaching advice. For Mike, it's about trusted collaboration with his customers.

He is a two-time Amazon bestselling author: **REMARKABLE SERVICE** — How to Keep Your Doors

Open and **RELATIONSHIPS FOR KEEPS** — How to Build Powerful Relationships in Business and in Life. Mike is working on his third book, **LUNCH WITH LEADERS** — Real Stories of Pivotal Moments for Today's Executive, scheduled to be published in early 2024.

Mike holds an MBA from Athabasca University; Completion of Governance Program for Small & Medium-sized Enterprises, The University of Alberta School of Business, Executive Education; Member of (ICF) International Coaching Federation; Member of Synergy Network (Edmonton), serving as Chair in 2016; Member of ACG (Association for Corporate Growth), President 2018-19 for ACG Edmonton; Member of the Institute of Corporate Directors; Ambassador, Foundation for the Advancement of Entrepreneurship, Past member of Toastmasters International, obtaining his Distinguished Toastmasters Designation – DTM. The Distinguished Toastmaster award is the highest Toastmasters International bestows. The DTM recognizes a superior level of achievement in both communication and leadership; Member of CAPS (Canadian Association of Professional Speakers); National TEC Canada Speaker; eSpeakers Certified Virtual Presenter; Past-President, Rotary Club of

Edmonton Mayfield (2005-06). Mike is a Certified Trainer for Everything DiSC®.

VICE PRESIDENT – INTEGRATION
X5 Management
Kris Schinke

Kris believes giving back is the greatest reward.

Kris is a focused and goal-oriented business professional with extensive executive experience in retail, financial services, and not-for-profit. She has a passion for inspiring and coaching others and believes a positive work culture is key for business growth and sustainability. She is adept in training, leadership development, and promoting teamwork.

Kris loves to promote successful business mentoring and professional coaching to help companies with organizational management. Kris

believes coaching offers the insights and guidance to help others achieve their potential with confidence and purpose. She believes everyone has potential if they are willing to take action.

Kris is delighted to be working with X5 Management, not only to support valued clients but also in her executive role, supporting the ongoing business growth, both internally and externally.

Kris is an avid volunteer and loves to donate time and effort to a variety of organizations. For the past 4 years, Kris has been a business mentor with ERIEC (Edmonton Region Immigrant Employment Council), working with professional newcomers for job placement and career advancement. This role also has also offered some personal benefits, such as improving knowledge about multicultural leadership and competencies.

A proponent of personal development, Kris has her Distinguished Toastmaster designation from Toastmasters International and her Life Coaching Certification from New Skills Academy. She also attended Harvard Business School (A Culture of Health in Business) and Norquest College (Inclusion at Work, Business Economics).

Kris is an Everything DiSC® Certified Facilitator and an Accredited Five Behaviors of a Cohesive Team™ Trainer. Most recently, she obtained her Diversity and Inclusion for HR Professionals Certification from the U of California. She holds an MBA from Athabasca University and published her first book, *According to Wolfgang, My Business,* a business reference book based on her entrepreneurial father's successful equestrian business.

Kris and her husband, Brian, have lived in 4 major Canadian cities and now call Edmonton home. Kris likes to stay active by walking, riding horses, or working out at the gym.

X5 Management offers an extensive list of communication, team development, leadership, sales, and service-related programs that can support any businesses training and coaching needs in any industry.

Recommended Reading

Straw, Julie; Scullard, Mark; Kukkonen, Susie; Davis, Barry. 2013, ***Work of Leaders.*** Wiley

Maxwell, John C. 2021, ***The 5 Levels of Leadership****.* Center Street

Mack, Mike. 2017, ***Remarkable Service***. CreateSpace Independent Publishing

Keller, Gary. 2012, ***The ONE THING***. Bard Press

Sullivan, Dan; Hardy, Benjamin P. 2021, ***The GAP and the GAIN***. Hay House Business

HOW TO STOP THE
REVOLVING DOOR

Can these strategies have a positive impact on your employees and your business results?

Yes! Based on over 17 years of supporting our valued clients, we have learned the importance of specific and focused strategies to "align teams to achieve". The backbone of every organization's success is its people, and when teams are aligned, the possibilities for success are endless.

We have included strategies that we typically recommend that can have a profound impact on the culture of an organization, regardless of size or industry. From personal perspectives, we have also included personal advice and entrepreneurial successes. We are also pleased to include several chapter conclusions from successful local entrepreneurs.

X5
MANAGEMENT
Aligning Leaders and Teams to Achieve

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