



Making Company Values Real and Personal

A Resource Guide for Facilitators

Introduction

When we have a meeting to discover shared values, the result is often a list of desired shared *social* values. People often emerge from these facilitated conversations feeling that everyone has had an opportunity to contribute and agree, and at the time meanings may well be understood. However, problems arise in the weeks and months after, when people are trying to operationalize these values and share their understandings with others to bring them into the process.

Often the problems are:

- It is hard to remember the list of values and meanings that were shared at the time.
- The values are usually expressed as nouns, which everyone can agree with, but which mean different things to different people, for example “honesty”.
- The words mean little to those who were not there. • It is not clear what behaviors would be required for individuals and the team to be “living” these values – for these to be “values-in-action.”

Rarely do we take the time to establish a clear charter of behavioral expectations with our teams, or they with us. In fact, are we clear what these standards are ourselves? Often we only know when the standard has been transgressed. When we understand this, we can see that establishing a clear set of *operating principles* for how we want to work together and the standards to which we are prepared to hold ourselves accountable: both are worthwhile ventures. Establishing operating principles is an invaluable way of working on the identity of a team or group *and* provides a safe and powerful tool for the team to raise difficult issues of behavior: as a group and with individuals members.

Outcomes

The underlying objective of the exercise¹ is the actual conversation that occurs among the participants. The outcome is that everyone has now a deeper and shared understanding of what these values mean

¹ This process or exercise is derived from a process called Totems, Taboos and Repetitive Interactions. The TTRI is a process originally developed by Charles Krohn and brought to Australia by Dick Knowles. It was further developed by Tim Dalmau for making values more concrete and operational.

in behavioral terms, they have become personal and real and there is a social contract formed between each leader and his/her team. Behavior is observable and members can hold each other, including the leader, accountable against this charter.

The items in the columns entitled “**What we will no longer do or allow**” and “**What we will do regularly**” become the written expression of the group’s social contract with itself and its leader. They provide the base of permission and empowerment to demand these things of each other – they become the standards of behavior. When these standards/principles of operating together have been discussed and developed in this manner, the charter can provide a reference for members and the leader to raise issues about unacceptable behavior in a way that addresses the issue and not the person.

The following is a step-by-step description of how to facilitate this process with a group or team.

The whole process should take between 2 and 3 hours and is best done with strong facilitation that, nevertheless, is balanced with adapting to each specific group and its needs

It is highly unwise for a leader to facilitate this discussion with his/her own team, and is best facilitated by two people if possible.

Groups should not be more than 15 in number. More resources and ideas are available at the end of this document in the appendices.

If you think you need extra advice or help either over the phone or in person then please contact on Tim Dalmau on +61 7 3289 2133.

NOTE: This document should be discussed face to face in detail in its entirety with the line manager of the group concerned before the exercise begins.

The actual process

The facilitators have prepared the space well and have a copy of the *company’s values* statement as a poster in front of the group and also a personal copy for each person in the room.

They introduce themselves and remind the group of the origins of this work in the company, whatever that may have been, e.g. a senior executive retreat.

This section of the meeting should probably take no more than 5 minutes.

At the end of this section the participants are asked to divide into groups of less than 6, certainly no more than 8.

The facilitators then send the small groups off to do their work for probably about 15 minutes maximum. Each group is allocated one of the company's values

The facilitators hand to each group the document entitled Values into behavior - Small group work. (Appendix III)

The facilitators "walk" the entire group through this document and ensure that all understand the process they are about to engage in before releasing them to go and do the work. One of the best ways to do this used to draw out the sequence of the exercise by a hand in real time on a piece of flip chart paper.

It is extremely important for the success of this particular exercise to emphasize that we are focusing on specific behaviors in each of the two columns, that is "**What we will no longer do or allow**" and "**What we will do regularly**", more than discussions about the values themselves: i.e. the company values should be taken as read. This is true for all phases of this exercise, both in the small group and the large group.

Prior to the return of the group to a large group room, the facilitators have prepared a flip chart (or even two separate flip charts) with a column headed "**What we will no longer do or allow**" (Taboos) and another headed "**What we will do regularly**" (Repetitive Interactions).

The group is assembled, and stabilized. The facilitator then invites one of the groups to offer up their four suggestions for the "**What we will do regularly**" column. They are asked to not only name each suggestion, but before moving on to the next item, explain to the large group why their group decided on that particular item.

The next small group is then invited to add additional items to the list in the Repetitive Interactions column: but before doing so they are specifically reminded that we are looking only for exceptions to the overall list is not for repeated material.

Again, each specific item needs to be caught up with the statement of reasoning and the explanation on the part of the presenter for the given some group.

This process is continued until all of the small groups have added their items to the **“What we will do regularly”** column.

At this point, it will be very, very, very important that only items which are stated in quite specific terms are used in the **“What we will do regularly”** and **“What we will no longer do or allow”** columns. There are two ways of helping people frame their contributions in such specific terms and they are

Option 1: Ask the person, if a visitor came to this group what would s/he see us doing, or hear us saying in very specific and concrete terms?

Option 2: Ask the person, what we will be doing or saying on a regular basis?

Avoid at all costs just writing up nouns: make sure verbs are used which describe actual behaviors

The same process is then repeated for the **“What we will no longer do or allow”** column

The handling of all of this process by the two facilitators needs to be done with some care and consideration.

One really unhelpful outcome would be to see this exercise become simply a listing of the output of the small groups.

This is why it is so important for each item to be explained to the group

as it is placed in each column, at least for the repetitive interactions and taboos. What is going on here from a group development point of view is a careful and serious conversation leading to commitment. Therefore it cannot be treated simply as part of collating small group output. The way in which the real purpose of this process is achieved will be dependent to a large extent on the capacity of the facilitators managing the group to do so from a highly credible position or demeanor.

When the list is complete it should have somewhere between 10 and 20 items in any one of the two columns.

With due course, ceremony and moment the two facilitators then sit down and ask the group how serious they are about living by these agreed behaviors.

This part of the process should not be rushed, and the two facilitators should be looking for unison of response in the way the group starts to behave and continues this conversation

At some point in time, possibly even up to 15 or 20 minutes in the extreme case after the two facilitators have sat down to seek the commitment of the group to these behaviors, one of the facilitators then says the following *"So it seems that we are quite serious about trying to live and work together by these behaviors [**What we will do regularly**"] and stamp out these particular taboos [**What we will no longer do or allow**"] that we have listed on the sheets of paper. In the light of this I want to go around the room and ask each person whether you are committing yourself to actually behave according to this agreed list of behaviors."*

The timing of this particular type of statement is critical and it cannot be rushed. It is not uncommon for groups at this stage to even end up signing the actual document.

At the completion of this phase, the facilitators look to the team leader or manager and asks them in front of the group whether they are prepared to

- 1.help the group stick by these agreed behaviors
- 2.turn them into a poster and post them in a prominent regular meeting place

- 3.give a small printed copy to every one in the room
- 4.ask the subordinates of the people in the room to help them stay honest to these commitments
- 5.review each person's performance (those in the room) regularly against these behaviors

Appendix I

Conducting the exercise with a number of groups?

If and why more than one group?

Small groups are designed to let people talk freely, to gather their thoughts and to do much of the preparatory work, so that it is easier on the facilitators in the large group session. They then bring their work to the large group and the facilitators help the whole group build a list of **“What we will no longer do or allow”** and **“What we will do regularly”** from the work that the small groups have done.

Do you need small groups? Not if you are confident as a facilitator that you can run the whole process in the large group alone. The reasons for the small groups are described in the previous paragraph.

Generally, if the total number of people is less than 8 then you probably do not need small groups.

What do the small groups need to do the task well? Clear visual instructions given to them in the large group before they leave to discuss things and a hand out, already prepared. It will help if you walk the whole group through the handout before the small groups leave the room.

What do the small groups actually do?

They

1. Review one or two core values and come up with answers to the questions **“What we will no longer do or allow”** and **“What we will do regularly”**
2. Bring their work back to the large group

What does the large group do?

It ..

1. Starts with the work of one group on one value
2. Gets this up and visible
3. Then adds to this with the work from other small groups
4. Builds the consolidated list of **“What we will no longer do or allow”** and **“What we will do regularly”**
5. Then takes another value from another group
6. Uses this to add to the total list of **“What we will no longer do or**

allow” and “What we will do regularly”

7. And so on

Please note: It is not a matter of working through every value that every group has produced. It is a matter of producing a list of **“What we will no longer do or allow”** and **“What we will do regularly”** that probably number less than 20 in each column but which arise from the work of all the small groups, if you choose to use them.

You will find a very high degree of overlap in the items that people come into the large group from the small group with in terms of **“What we will no longer do or allow”** and **“What we will do regularly”**.

Therefore it is not a matter of building a massive list, but getting agreement in the large group about the agreed and main items under the two headings **“What we will no longer do or allow”** and **“What we will do regularly”**.

Note to two facilitators

It will be extremely important for each of the two facilitators to have carefully read and understood the fundamental process before beginning the segment of the work. It is also extremely important that the two facilitators read and understand the section of this document entitled *Lessons From The Field* .

Success will to a large extent depend upon careful preparation by the facilitators, preparation that is done well in advance.

The facilitators need to stress very clearly and carefully to the group that the discussion that is about to follow is about how the particular people in this specific business unit, site, plant or office are actually going to behave together in the future.

It is not a theoretical discussion about people in the company generally, nor about this group generally. It is a quite specific set of commitments and understandings about how **we** are going to behave together and work together.

If the workshop is constructed of more than one business unit, then the two facilitators will probably need to separate out and run this

workshop as two separate processes, one for each business unit.

Obviously if this is the case, there will need to be some modification of the process outlined earlier in this document. It may be that each individual facilitator actually guides the specific process from beginning to end, or even dispenses with the small group segment of the work.

The two facilitators need to be careful in their thinking and planning about how best to manage this process if there is more than one business unit involved. The important principle to remember and keep in mind is that the commitments sought are for intact business units or teams or sites.

When people arrive and enter the room

Participants move to group room

One of the facilitators stabilizes the group and gets its attention.

Participants are welcomed

One of the facilitators starts by holding up Cell Phone, looking down and to center of circle, waits until group is totally silent and then says "I have just turned this off, will you all do the same now, please?".

Pause – do nothing; keep still, until all people have switched off their phones, only then start talking

Appendix II

Lessons from the field

Over the past 15 years, thousands of people in many companies in many countries have gone through the type of exercise described in these pages.

We have been able to discern quite clearly those groups who have capitalized on their initial investment and done great things from those who have not reaped the maximum return.

The bottom line: the behavior of the leader

There may be many factors which either contribute or hinder a group maximizing its investment, but in all cases there is one *common and critical variable* that distinguishes those groups who have done well from those who haven't: it is the behavior of the leader of the group.

Where the leader has insisted that the group continue its work started at the session continue and has

- ensured frequent the agreed and fundamental meaning attribution in his/her framing of situations;
- insisted that protocols, behaviors, and methods introduced at the meeting are continued in the workplace;
- ensured regular review of performance by the group against its stated intention and principles; and
- insisted that there is follow-up regularly of the group with the workshop facilitators or consultant/s for on-the-job coaching of the team,

then the work and benefits have flourished. Where s/he has failed to do some or all of these things then the group and the investment has languished.

There is no soft or gentle way of saying this simple fact. It is as it is.

In what follows, there are a number of suggestions for the leader/manager and the group to consider. They are not meant to be prescriptive, but guidelines to build on and extend the development of the group and its work.

Where the leader picks up these suggestions and insists they are followed, the group will reap the maximum possible benefit from this type of process

Where s/he is unsure or half-hearted in either word or deed then there will be doubt about whether the team will grow and benefit.

A special place

It is advisable to set aside a particular room where this material from this exercise can be posted on the walls.

In some cases, groups have found it beneficial to have the slides (if there were slides) or documents printed on A4 paper in color and then had these magnified to A2 or A1 size and put on the wall of this room.

Others have also had pocket size copies made so individuals can carry them around with them, along with the company's values

The group continues to meet in this room to conduct its business and is reminded whenever it does so of the intentions and agreements formed at this session from whence they were derived.

If it is impossible for the group to set aside a new room for this purpose then a room currently used for its meetings will be OK, "move" it around in some way, i.e. the furniture and artifacts altered. Remember every experience has a structure and if you want to change the experience one way is to change the structure of that experience.

You do not want the team members reverting to old behavior patterns, and one way to ensure this is with the visual anchors of the material on the walls and the new physical arrangements.

Meeting regularly with a purpose

If you care for, nurture and nourish a new young seedling it will grow into a huge tree. If you leave it to nature's elements, then whether or not it flourishes is often a matter of chance.

One of the best ways of nurturing and nourishing a team that has been through this type of exercise is via regular meetings, but not simply meetings for their own sake.

Note: Video conference meetings are absolutely not a substitute for face to face meetings.

The frequency and duration of these meetings will vary from place to place and it is hard to be definitive about what works best, but meetings more than 6 weeks apart are stretching the thread of possibility a little too much.

On the other hand we have seen a number of groups engender significant frustration among their members by meeting regularly without either,

- a clear and universally well-understood agreement among the members that the meeting is simply and solely for their relational improvement, or
- a clear and strategic business outcome to their deliberations

In the metaphor that has become current since 1999, if we are going to make the boat go faster then

- either the crew meets to enhance the relationships among crew members and this is understood and agreed by all, and they are constantly reminded of this when they have their meetings, or
- the crew meets to continue its deliberations about the race they and their boat is in and their work in this regard, i.e. performance improvement

Appendix III

Turning Values into Behaviors

Small group work

Introduction

This exercise will help you and your colleagues come up with a list of core values and their expression in behavior that will be important to guide the work of this business unit going forward.

It will involve first some individual reflection work and then a discussion in your small group.

Individual work (5 minutes)

Take a moment to think back over what you have just heard. Try and imagine that the business unit of which you are part has taken the aspirations and hopes of this company as expressed in the *company's values statement* very seriously indeed and become transformed in every sense: it is humming, both in the work it does but especially in the way you and all your colleagues relate together.

Your small group has probably been allocated one of the core company values by the facilitator/s.

Q1: Try and write down in words in the space at right as many of the things that you can that a visitor would see happening regularly, i.e. repetitively, around here as the value is realized on a day-to-day basis.

Try and be as specific as you can. Avoid using simply one word lines. Avoid using just nouns. Create sentences

Q2: Now try and write down in the space at right as many things as you can that would no longer happen around here, i.e. behaviors or patterns of behavior that are now taboo, no longer tolerated. Try and be as specific as you can. Avoid using simply one word lines. Avoid using just nouns. Create sentences

Small group work

Come together with your colleagues and decide as group what you believe to be the one or at most four key behaviors that you all agree we expect to see happening regularly around here, and the up-to-four things we will no longer tolerate around here.

By the time you have finished this exercise you should have no more than four items at a maximum in each of two columns.

Return to the large group

As you come back to the large group ensure that you sit next to the colleagues with which you have just undertaken this exercise. Place of sheet of flip chart paper in front of you on the floor in the large group circle in such a place that all of you can see it and be guided by the facilitator/s as to what and when to contribute to the large group discussion.