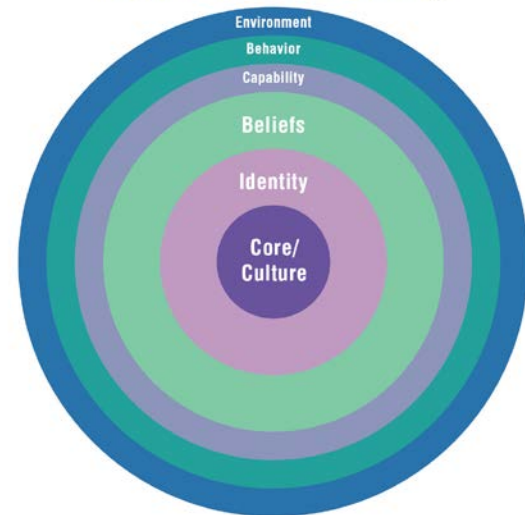


# Create The Culture Of Your Dreams

The Neuroscience of Engagement



Logical Levels of Change





VS

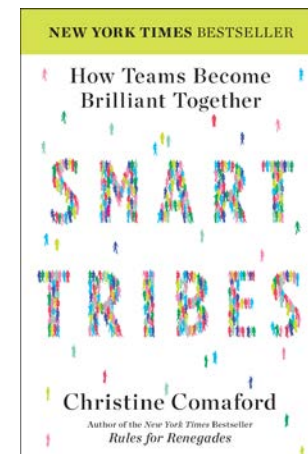


# What You Will Learn Today

- **How the brain works** and where engagement happens
- **The 4 keys** to get deeply loyal high performing employees
- **Key questions** to test your culture
- **Templates** you can use starting TODAY

# Christine Comaford

- Neuroscience-Based Leadership and Culture Coach
- 5x Entrepreneur, Avg 700% ROI
- Leadership blogger for Forbes & Inc.
- Consulted/coached 2 USA Presidents, 4 Billionaires, 700 F1000
- Helped 300 companies like yours to create engaging cultures



# Group Lab: Engagement Survey

- It's safe to try new approaches, to innovate, to share my ideas at work.
- I trust my team members and colleagues to support my and the company's success.
- I feel emotionally and physically safe at work—in the environment, with the tools provided, with my colleagues.
- I am motivated by my company's mission, vision, values.

# Lab: Engagement Survey (Cont'd)

- I receive acknowledgement and appreciation at work.
- When I make a mistake I am corrected with respect and the desire to help me improve.
- I have a career development path that my leader continuously supports me in.
- I understand the expectations of me and my performance.
- I feel I matter to my leader and the company—I am making a difference here.

# Engagement Net-Net

[illegible]

# Global Employee Engagement Is LOW

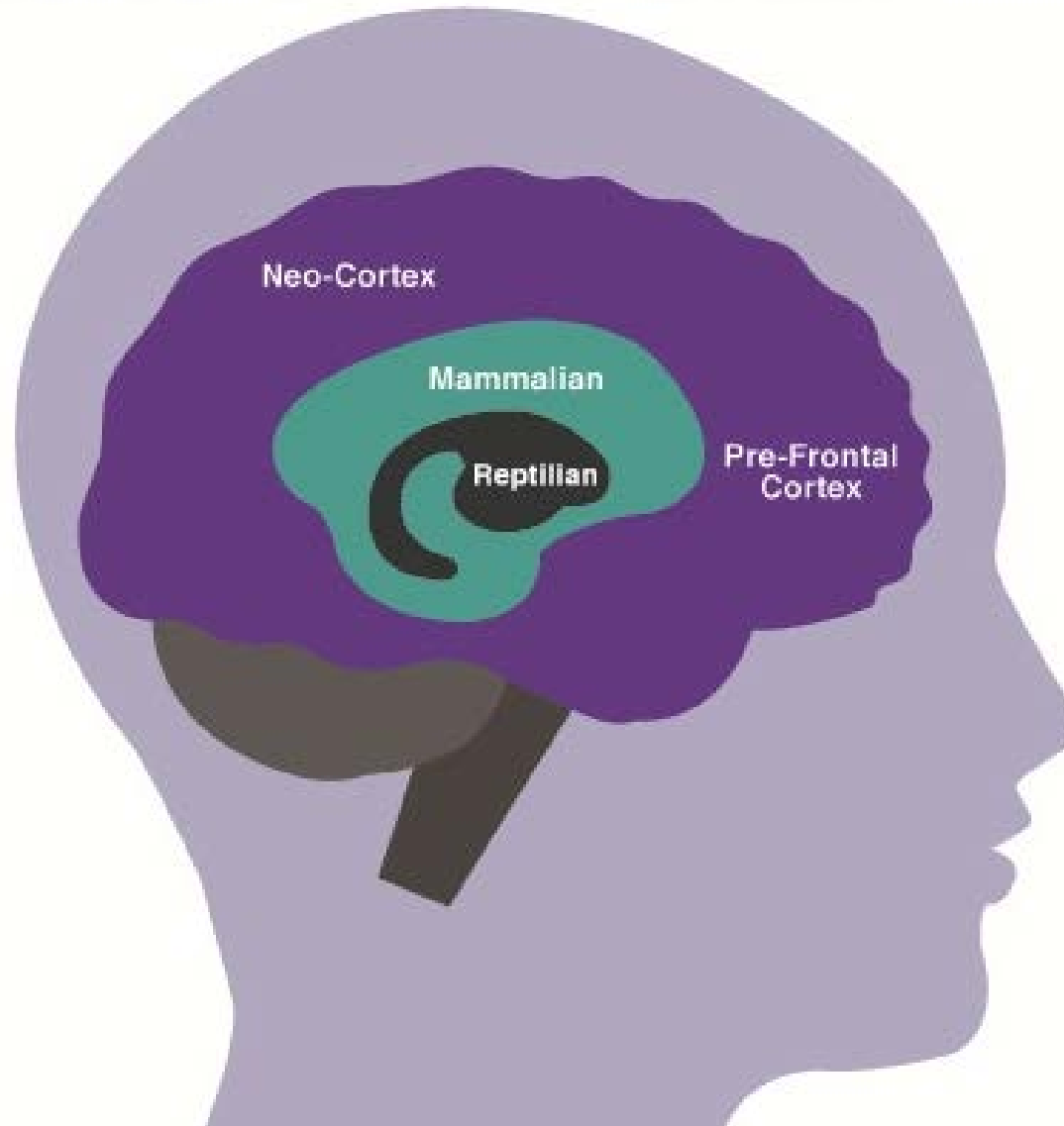
Region	Engaged	Not Engaged	Actively Disengaged
United States / Canada	29%	54%	18%
Latin America	21%	60%	19%
Central / Eastern Europe	11%	60%	30%
Western Europe	14%	66%	20%
China (Includes Hong Kong)	6%	68%	26%
India	9%	60%	31%
Australia / New Zealand	24%	60%	16%



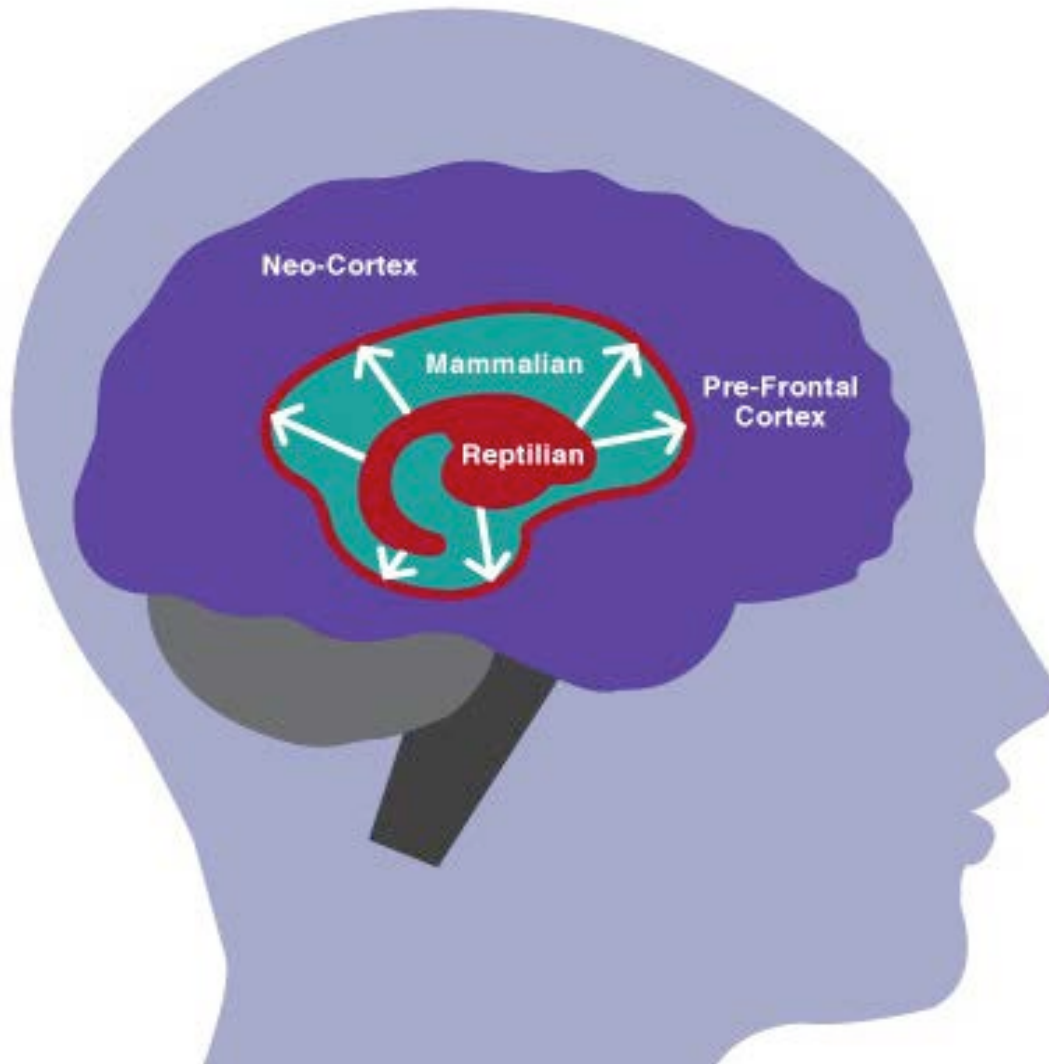
# The Impact of Talent Constraints

PWC Global CEO Survey: How have talent constraints impacted your company's growth and profitability over the past 12 months?	USA CEO Results	Global CEO Results
Cancelled/delayed a key strategic initiative	22%	24%
Unable to pursue market opportunity	24%	29%
Unable to innovate effectively	20%	31%
Couldn't achieve growth forecasts	16%	24%
Quality standards fell	16%	21%
Talent-related expenses rose more than expected	43%	43%

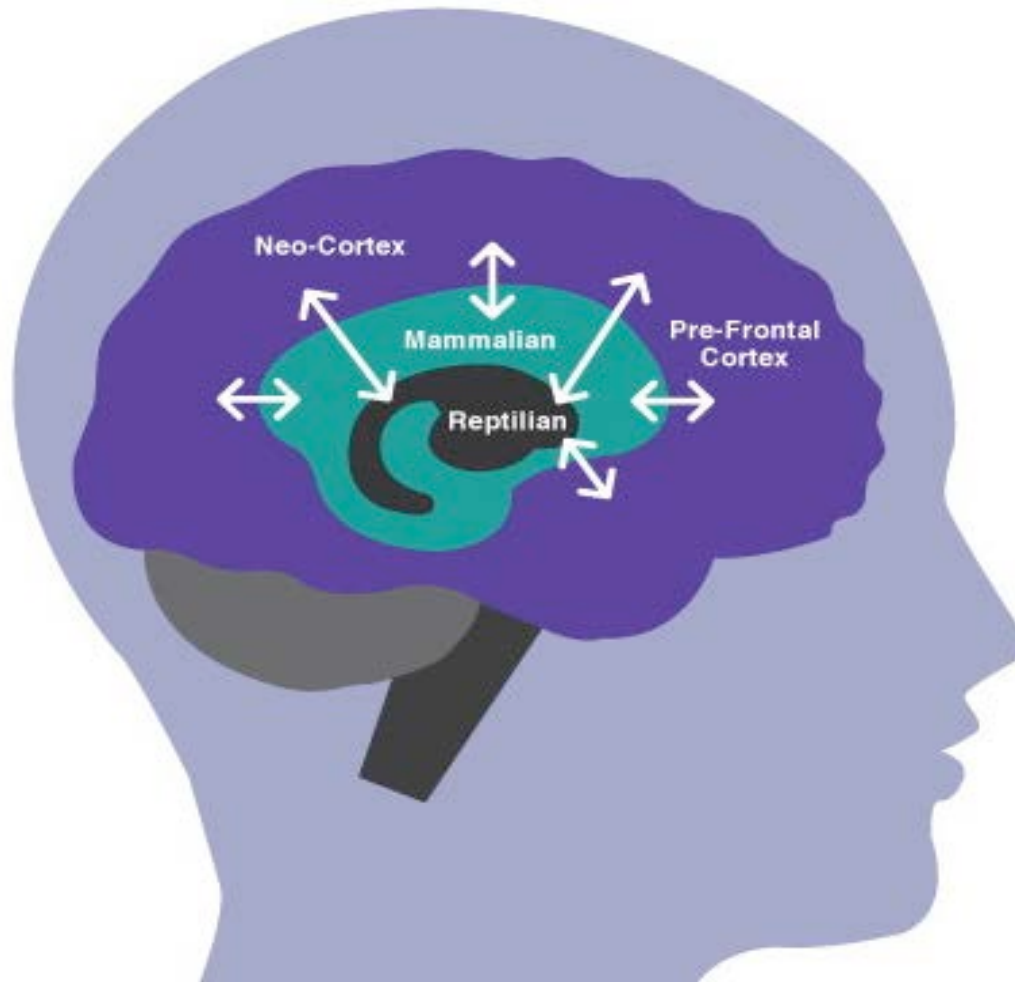
# The Basics Of Your Brain



# The Reptilian/Mammalian Combo: The Critter State Has **Limited** Access



# The Neocortex/Mammalian/Reptilian Smart States Has **FULL** Access



# The 4 Keys = Get Your GAME On

**Growth:** IDPs, Leadership Levels & Lunches, Annual Learning: 24 hrs all/2 weeks leadership

**Appreciation:** High 5s, Rock Star, Weekly Wins, Friday Toast



















**Measurement:** Accountability Structures, Weekly Status, Dashboards, Feedback, Counseling, Performance Reviews, Engagement Surveys

**Engagement:** Mission Vision Values, "Coffee w/CEO" (skip levels), company contests, VAK goals

...We'll go over them in area of leverage to you—the leader of the organization

# G = Growth

## How to Move Through Some Common Revenue Inflection Points

\$10 million	\$25 million	\$50 million	\$100 million	\$250 million	\$500 million
<p> Begin executive coaching if not in place, mission/vision/values, basic accountability structures, rewards, consequences, code of conduct for company, cultural identity and rituals, executive 360s, clear LVA/HVA (low value/high value activities)</p>	<p> Cultural Assessment, mission/vision/values edit, Individual Development Plans (IDPs), Leadership Development Program (LDPs), executive code of conduct, community building programs, management 360s, advisory board</p>	<p> Possible founder transition, mission/vision/values per subsidiaries/operating divisions, seasoned C-Suite, Board of Directors, board management, 3 levels of succession planning, consistent IDPs, LDPs, 360s at all leadership levels, check and enhance cultural rituals</p>	<p> Cultural, Execution Assessments; Next evolution of exec team/board/leadership, corporate governance, M&amp;A integration, succession planning at all levels, leadership and development tracks throughout company, pervasive 360s, remote sites share HQ cultural identity</p>	<p> Cultural Assessment, subsidiary/site culture management and optimization, mission/vision/values check in, evolution of IDPs, LDPs, 360s, retention strategy, tune up cultural rituals, executive evolution, profile raising and outside board seats, check and enhance cultural rituals</p>	<p> Cultural/Leadership/Execution Assessments, annual 360s across all leadership levels, optimize acquisition integration, ensure consistent culture across subsidiaries, enhance succession planning and executive cultivation</p>
<p> Sales Assessment, basic sales process and plan, sales commission and accelerators tied to product profitability, minimal funding</p>	<p> Sales Assessment, sales process optimization, consider launching/expanding channel sales, departmental budgets and cost centers, possible expansion capital</p>	<p> M&amp;A, diverse/vibrant/reliable revenue streams, channel sales substantial, expansion capital/liquidity/private equity options, stock option program if not already established, international operations</p>	<p> Sales Assessment, sales comp plans evolve, exit/liquidity plans, strategic partners, expanded channel sales and diverse rep needs/profiles, clear ROI of all departments, products, services, programs</p>	<p> Mezzanine or strategic partner expansion capital, exit/liquidity/roll-up path clear and time to plan execution of it, check in on sales incentives and effectiveness, spend management and optimization</p>	<p> Sales Assessment, diverse revenue streams, revise sales commissions/quotas/territories, possible financial restructuring, expanded international operations</p>
<p> Short product path, product/service mix, simple markets, basic marketing process and plan, thought leadership position launched, prelim Buyer's Journey process</p>	<p> Marketing Assessment, more diverse product offerings, expanded markets, marketing plan and process, 5+ marketing channels, thought leadership and Buyer's Journey established</p>	<p> Acquire products and/or companies, marketing effectiveness tracked/monitored, white label programs, innovation strategies set in place, high visibility and influencer ranking, establish annual industry index/benchmarks</p>	<p> Marketing Assessment, diverse and deep product lines, strategic marketing alliances, annual industry index is respected and oft-cited, additional acquisitions, vibrant innovation and product line extension, expanded markets, industries, geographies</p>	<p> Possible separate marketing departments per unique product lines, evolution of white label, productized services, next rev of product path, optimize innovation process and index</p>	<p> Marketing Assessment, identify leverage between product lines, expand channels and marketing partners, check manufacturing and innovation optimization</p>

 People  Money  Model

*Note: All previous People, Money, Model components must be sustained in order to get to and through the next inflection point.*

## Net-Net: Activate Aspiration



# Tool: Individual Development Plans

1. 2 or more possible evolutions 1-3 years from now:
  - Job skills that need to be gained for each
  - Leadership skills that need to be gained for each
2. Timeline for acquiring skills
3. Plan, budget, leadership commitment
4. Next steps & quarterly check-in
5. Plan *driven* by the individual, *supported* their leader

# Lab: Leadership Levels

Consider the levels below. Where are you? Where are your key team members? What tools from today will help you and your team rise to the next level?

## Leadership Levels

Level 9: Create Optimal Teams – Yielding Consistently Remarkable Results

Both Internally + Externally

Level 8: Strategize, Manage, Guide Change At Company, Team, Individual Levels

Level 7: Powerfully + Consistently Influence, Enroll, Engage, Align Internally +Externally

Level 6: Powerfully + Consistently Lead Others Internally

Level 5: Act & Report Routinely

Level 4: Act & Report Immediately

Level 3: Recommend, Then Act

Level 2: Ask What To Do

Level 1: Wait To Be Told





# Leadership Lunches



## Culture & Talent Playbook

### How To Launch and Manage A Leadership Lunch Program

Thanks for your commitment to building a SmartTribe. As of December 2014 we're thrilled to have 142,000+ SmartTribes in process!

We find that the best way to get started on your SmartTribe is to launch a Leadership Lunch group, where a cross-functional group of existing or aspiring leaders meet regularly to discuss their challenges. Make sure a code of conduct is in place (see our Leadership Code of Conduct resource if you need help) to ensure everyone feels safe asking for help.

Here's the format we find works best:

- Size:** 6 people
- Mix:** Peers across different functions within a company—this fosters collaboration and builds new relationships
- Meetings:** 1-2x per month—set a recurring schedule and meeting location so administration is simple (example: first and third Thursday of the month at noon in the SW corner of the lunchroom, bring your own food)
- Format:** Set a code of confidentiality, meet and discuss how you're applying these techniques, support one another in problem-solving, rotate leadership of session each time, start at chapter 1 in SmartTribes and cover 1 chapter each session  
Example:

Club Member	Leads Club Week	Chapter
Bob	1	1
Sue	2	2
Arjun	3	3
Mary	4	4
Tyrone	5	5
Lee	6	6

# A = Appreciation



## Net-Net: Create Celebration

# Rock Star, High Fives



Add



## High Fives, Rocks, and Catches

- |           |   |            |
|-----------|---|------------|
| 10/3/2013 | <a href="#">Nelson, Brandon &amp; Alvin - Marketing's New Besties!</a> <small>NEW</small> | High Five! |
| 10/1/2013 | <a href="#">URAC Support</a>  | High Five! |
| 9/30/2013 | <a href="#">Nice job on a First Comp Work Flow, Laroice!</a>                              | High Five! |
| 9/30/2013 | <a href="#">You Amaze Me!</a>   | High Five! |
| 9/30/2013 | <a href="#">Ciara Fordham Submits URAC Reaccreditation Documents</a>                      | Rock!      |

[Read More>>](#)

# High Fives, Shout Outs



Unia is a human dynamo. <small>NEW</small>	7/11/2014 10:22 AM
Leah: Nothing But great help!!! <small>NEW</small>	7/11/2014 10:25 AM
Micaela Root Creates Ecstatic Customers! <small>NEW</small>	7/10/2014 4:53 PM
Robin is a gem (so says Westfield) <small>NEW</small>	7/10/2014 4:04 PM
Math is hard. Kristina T is awesome. <small>NEW</small>	7/10/2014 12:51 PM
Let's Get Aziz Some Coffee! <small>NEW</small>	7/10/2014 8:26 AM
Thanks Kristen B!	7/9/2014 4:22 PM
Troy R. Bill note entry	7/9/2014 11:07 AM
Thanks Charlotte!	7/9/2014 8:54 AM
Thanks Kevin!	7/8/2014 10:04 AM
Kate's A Rockstar!	7/7/2014 7:07 AM
Way to Go, Jill!	7/7/2014 7:06 AM
Jessica B. Creates Ecstatic Customers!	7/3/2014 12:21 PM
Amor continues to Creat Ecstatic Customers!	7/2/2014 2:06 PM
Thank you Mentor!!!!!!!	7/2/2014 2:00 PM
Ben delivers on time-sensitive Revenue Reports for FGA!	7/1/2014 3:20 PM
Big thanks to Romane!	6/30/2014 8:02 AM
Brian J & Leonard - FGA Invoice & Payment Tracking	6/30/2014 8:02 AM

# Appreciation & Acknowledgment

OH YES  
YOU DID.

Recognition Moments:

43,171

Rewards Redeemed:

2,276

Points Earned:

34,780,436

Points Redeemed:

13,960,023



**George Murphy** has just received a postcard recognition for "Bright Idea" from **Jerry McDonagh**.

*George rearranged the coolers upstairs onto 2 pallets making it safer and more accessible next time someone needs a cooler!*

12 minutes ago.



**Roxane Swamba** has just received a postcard recognition for "Teamwork" from **Stacy Boyles**.

*You set a great example today by getting the team involved to help troubleshoot new procedures. It was fun and productive to see and hear everyone's ideas. Will be great to use this model for more projects.*

15 minutes ago.



**Reye De La Cruz** has just received a postcard recognition for "A Thank You" from **Jerry McDonagh**.

# Appreciation & Acknowledgement High Five Hand

Superior Products

Never Be Satisfied

From: \_\_\_\_\_

To: \_\_\_\_\_

**DIPACO**

Why: \_\_\_\_\_

Ownership



# M = Measurement



Net-Net: Get and Keep Momentum

# Weekly Status Using Needle Using Needle Movers

Completed Week of October 8	Not Completed and Why	Key Projects Week of Oct 15	October Needle Mover Status	YTD Status on KPIs
<p>Design Retailer sales kit</p> <p>Meet with Development to consolidate product lines</p> <p>Meet with Finance re: DSO reduction</p> <p>Strategic planning offsite</p> <p>4 client meetings re: 2011 orders</p> <p>Weekly Win: 2 new Strategic Accounts on-boarded</p>	<p>Interview sales intern</p> <p>Why: Underestimated time required to on-board new accounts</p>	<p>Meet with Client Care to design Client Service Rep up-sell/down-sell/cross-sell scripts</p> <p>Meet with Inventory team to set fill rates, turn, aging rates for 2013</p> <p>Train new Account Manager in sales process</p> <p>5 client meetings re: 2013 orders</p>	<p><u>Monthly Revenue:</u> <u>Current \$2.97mil</u> T: \$4.6mil MB: \$6mil</p> <p><u>Monthly Gross Margin:</u> <u>Current 7%</u> T: 8% MB: 10%</p> <p><u>2011 Rep Quotas, Sales Process, Training Dates Set</u> T: 10/19 MB: 10/12</p>	<p><u>Revenue:</u> <u>Current \$46mil</u> T: \$57.5mil MB: \$60mil+</p> <p><u>Gross Margin:</u> <u>Current 7.35%</u> T: 8% MB: 10%+</p> <p><u>% Revenue From Channel:</u> <u>Current 40%</u> T: 41% MB: 45%+</p>



# Conversations and Feedback

- 4 Conversations (be *curious!*):
  - Are you OK?
  - Is there too much on your plate?
  - Is this role not the right fit for you?
  - Do you really want to work here?
- Feedback That Doesn't Frighten (send into Critter)
  - What worked/What I liked was \_\_\_\_\_
  - What I'd like to see more of is \_\_\_\_\_
- See our Counseling Process in Appendix

# Performance Reviews

- 2-4x per year (consider on hire date anniv + 6 mo later)
  - Ideal: 2 formal, 2 informal (quarterly)
  - Have person self-evaluate first and send you results
  - Collaborative spirit, retain respect, theme = growth
  - Based on needle mover achievement, non-subjective
  - Bonus or salary increase *or additional perks*
  - Divide across co needle movers/personal needle movers/professional growth
  - Review IDP status at this time too

# "This Tool Works!"



"I have streamlined my focus, deliver more effective communication, feel more empowered and energized.

My leadership team is collaborating and communicating better, moving through healthy conflict to positive outcomes—absolutely critical given our breakneck pace of growth.

*Dave Selinger, CEO, Rich Relevance*



E = Engagement



Net-Net: Emotionally Engage

# Tool: Mission, Vision, Values

## 1. Mission

Our emotional (“we believe”) purpose, why we get up in the AM

## 2. Vision

Where we’re going together (aspirational), and why it matters

## 3. Values\*

Who we are/how we behave as we fulfill our Mission and drive toward our Vision

\*These must be alive, celebrated, modeled by all

## Our relationships are founded in **Trust** and **Respect**.

- We assume positive intent and give each other the benefit of the doubt.
- We don't hold on to perceived injustices or inequities.
- We celebrate our differences and value the experiences each person brings to the team.
- We are respectful of each other's time and geographical location.
- We understand things can go wrong and mistakes will be made.
- We focus on the issue, not the blame.

We promote **Open and Healthy Dialog** up, down and across the team.

- We encourage an environment where everyone's views are heard.
- We proactively seek feedback from others.
- We provide accurate and timely feedback and do so in a respectful manner.
- We are driven but not rude. We are proud of the way we communicate with each other.
- We seek to understand. We are curious and ask lots of questions.

## We foster an environment of **Teamwork and Collaboration**.

- We engage each other collaboratively.
- We do not work in silos. We get better results working across organizational lines.
- We give credit where credit is due.
- We make our colleagues better. We set each other up for success.
- We empower each other.



# Tool: Recruit For Values



Culture & Talent  
Playbook

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## How To Recruit For Value Alignment and High Accountability

Many clients ask for help in streamlining their recruiting processes. Here's how we find they often are going wrong:

- Candidates aren't being screened for alignment with company values
- Candidates aren't being asked enough self-revealing questions
- Recruiters aren't using rapport techniques to powerfully put candidates at ease—which would result in them revealing who they are

A job interview is a candidate's "Rock Star Moment"—they're showing you their best face, so it's up to the recruiter to ensure that it's an accurate face, a face we can rely on, a face that is honest. Here's a sample list of recruiting questions that apply to all roles in a company:

- Which of our company values are most aligned with your personal values? Why?
- Please tell me some times in your career when you've most powerfully embodied our values?
- What are the 5 career accomplishments you are most proud of? Why?
- What are 5 adjectives used to describe you by: colleagues, bosses, friends, yourself?
- What makes a working environment most compelling?
- Where do you want to be career-wise in 3 years? 5 years?
- What is your mission in life and why would working with us help you achieve it?
- What is the most important thing in life? How do you ensure you honor it?
- Please tell us a bit about your past entrepreneurial experiences and why/how you'd fit in with us.
- [add all of your role-specific questions here]

# Tool: Recruit & Retain Process



Culture & Talent  
Playbook

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## Effective Recruiting and Retention Process for Consistent Results

Our clients like to create a recruiting process that is unique to their culture. That said, here is what we find is always consistent across our clients that have the most effective recruiting which leads to the most consistent retention:

- They recruit for value alignment and accountability. See CCA Resource: Recruiting for Values.
- They like to follow a standard logistical recruiting process. See CCA Resources: Recruiting Kit, Recruiting Process.
- Do standard employee testing – pick your favorite, many of our clients like Dr. Ron Trego's tests.
- They profile meta programs for the role, the candidate, and see if they match. See CCA training on The Neuroscience of Influence, and chapter 7 of SmartTribes.
- They have Individual Development Plans and show a sample during the interviewing process. See CCA Resources: Leadership Kit, IDP Tracking, Performance Self Eval.
- They explain their key cultural rituals (rock star, high five, contests, mini celebrations each day during crunch time). See CCA Resource: High Five/Rock Star.
- They reinforce a tribal mentality and how we're all in this together, every person contributes and matters, tell us if something isn't working as the top leaders are human too.
- They stress their Learning and Development Plan overall. For example, many of our clients have 2 weeks of learning annually for employees that lead others, and 24 hours of learning for all employees overall. Learning is tracked on the company intranet via the Talent (HR) team. Leadership Lunches, webinars, and short video learnings all count. Learning content is hosted in the Learning Management System on the company's

# "This Tool Works!"



"Now we clearly see what we're not doing, what we can be doing, and how exactly to do it to get the increased results we want.

Our team is jazzed—it's as if the lights have been turned on bright and we can see farther and with greater detail."

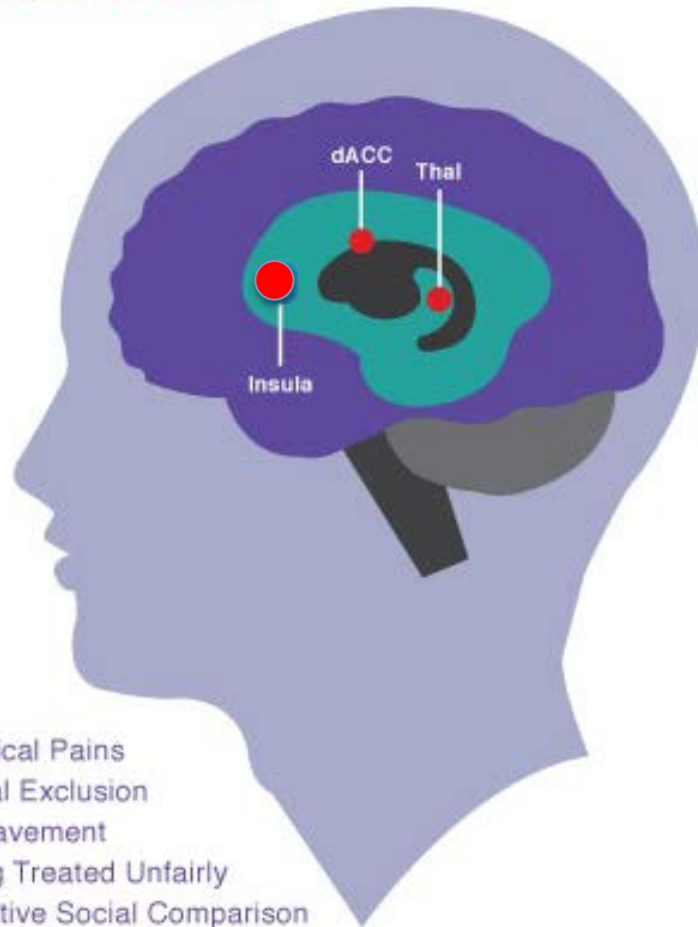
*John Gorski, CEO, NAMSA*

**NAMSA®**

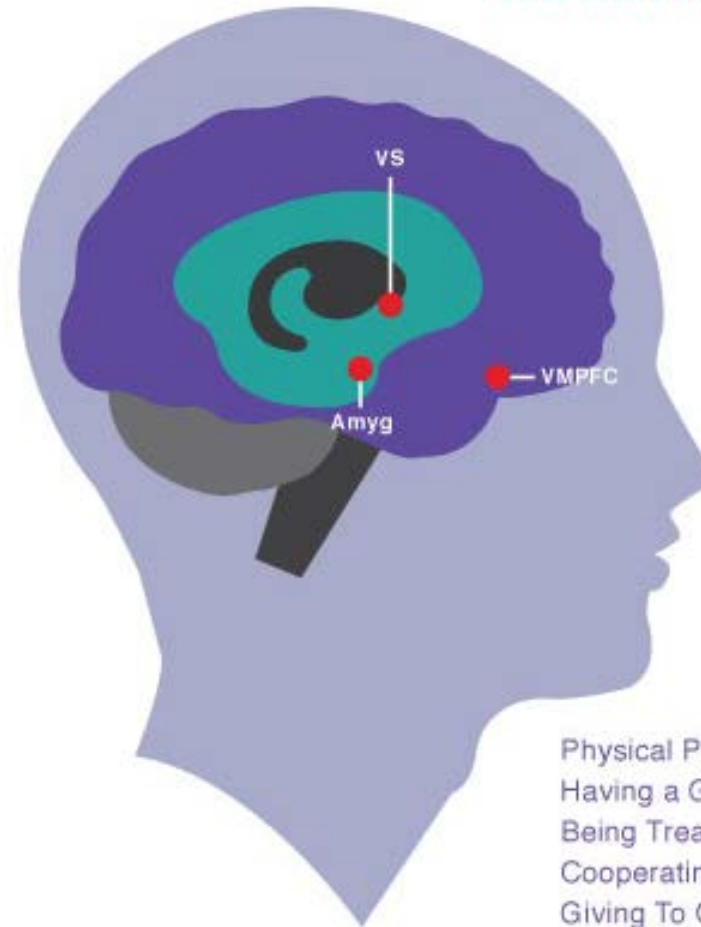
# The Bottom Line Is...

## Pain and Pleasure

### Pain Network



### Reward Network



# "This Tool Works!"



"The results have been remarkable. Our employees are more engaged and taking greater initiative and our company is reaping the substantial benefits.

We are on track to double our 8 digit revenue in the coming year. And I have greater visibility and more time to focus on strategy."

*Michael VanErdewyk, CEO ReliaMax*



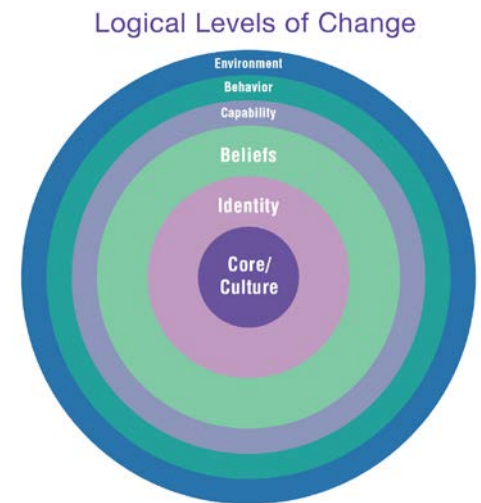
# Key Takewayes

**Growth:** IDPs, Leadership Lunches, Annual Learning: 24 hrs all/2 weeks leadership

**Appreciation:** High 5s, Rock Star, Weekly Wins, Friday Toast

**Measurement:** Accountability Structures, Weekly Status, Dashboards, Feedback, Counseling, Performance Reviews

**Engagement:** Mission Vision Values, "Coffee w/CEO" (skip levels), company contests, VAK goals



# Thanks & Next Steps

- Monthly growth resources: [SmartTribesInstitute.com/join](https://SmartTribesInstitute.com/join)
- 3 min culture assessment: [SmartTribesInstitute.com/grow](https://SmartTribesInstitute.com/grow)

## Join Our Tribe!