



Conference Proceedings

Co-Chairs

Jessica Ferguson, City of St. Charles, Missouri
Steve Tingley, American Family Insurance

President's Welcome

Gregg Moss, Bank of America

Good afternoon, everyone. Welcome to CMMA San Diego! I see many familiar faces and quite a few new ones, which is a good thing.

We focus a lot on leadership at our conferences. I was listening to an interview recently with an author I respect a lot, and the interviewer asked him what leadership means to him. He said a leader is someone who raises up everyone around him or her up, so they can succeed together.

This room is full of leaders, and everyone here wants to help their colleagues. That is the great benefit of this organization and these conferences.



How to Get the Most out of the Conference

Conference Co-Chairs:

Jessica Ferguson, City of St. Charles, Missouri

Steve Tingley, American Family Insurance

As we kicked around ideas for the conference, we settled on two main content areas: staffing and technology.

We recommend you sit with someone different every day, including at meals. Network!



Building a Diverse Team and Building for the Future

Melonie Parker, Chief Diversity Officer & Director of Employee Engagement, Google

Ice Breaker: “Stand and Be Noticed”

I will read you a series of statements. If they apply to you, please stand. Observe who’s with you and who is not. There’s no judgment!

- If you travelled more than 100 miles today.*
- If this is your first time attending a conference.*
- If you have been in your current role for less than five years.*
- If you have been to Disney World in the past five years.*
- If you are married.*
- If you have children, including the furry kind.*
- If you are a cat person.*
- If you one of your favorite foods is pizza.*
- If your favorite type of music is country.*
- If you identify as a woman.*
- If you identify as a racially or ethnically diverse person.*
- If you identify as a Christian.*



What were some of the things you noticed during this exercise?

Responses:

- *There are a less country music fans than I expected.*
- *There’s a lack of diversity here.*
- *We have a lot of cat lovers.*

Was there anything that stood out as glaring for you?

Responses:

- *Surprised to see a lot of non-Christians.*
- *Your questions near the end upped the tension in the room.*
- *The atmosphere in the room shifted when we started talking about identity.*
- *For the question about identifying as a Christian, people were slower to stand up until others did and they felt safe.*

Typically, people call out the last three questions as uncomfortable.

I wanted to start the conference this way to encourage us to get comfortable about topics that we may be uncomfortable talking about. People are uncomfortable having difficult conversations. We don't want to offend anyone, so we say nothing. Let's extend grace to one another during this conference. MRI: Most Respectful Interpretation.

Another acronym I like:

W.I.S.D.O.M : What I Shall do on Monday

What are the skills that you are going to be able to develop here at the conference that you can take back with you?

Media managers are continually challenged to stay abreast of trends and changes in technology at the same time that you are paying attention to your team and building a strong culture. All our employees have the same personal needs that we do.

Two aspects of Diversity

- Representation
- Inclusion

Representation and a culture of inclusion go hand in hand. Hard to make progress in one without the other. Goal is every employee feels respected and included as part of the team.

Who you hire largely determines your ability to succeed. I work in the heart of technology start-ups; a high percentage of them who fail do so because of people issues.

What should you be looking at when hiring a new employee?

1. Take your time.

The world would have you believe that all the most talented people are already hired, but that is categorically wrong. When you look for nontraditional people and take a chance on them, the talent wars go away.

We at Google think diversity is a good thing to do. It's critically important in order to have diversity in options and talents. It's important not just for your team but for your organization as a whole.

What do we need to add into the group that we don't have? What is the value the new employee needs to add?

Not so much focus on culture as it is; what does it need to be?

2. The Search

Short and long-term options for the role. Short-term and long-term expectations for the person.

Build a profile with competencies, and desired future competencies.

Write a job description:

- Gender neutral
- Words are important!
- Cast a wide net

Many of us use recruiters to find candidates for us. Make sure the recruiters are focusing on the competencies needed for that job.

3. The new hire

Once we make the hiring decision, need to make sure that person feels included as part of the team.

What community of support are you putting around the new hire?

A second component: fostering an inclusive workplace

- Doesn't mean just hiring more women or women of color.
- Need a sense of belonging.
- Your team may be quite homogenous, and you will have to work hard to create an inclusive environment.

Fostering an Inclusive Workplace

- Have your employees' backs and make sure they know this.
- It's a gift that the employee chose your organization; they could work many other places.
- Need to re-recruit your employees every day.
- Build trust
 - Without trust they are just individuals who work for you
 - At Google, we did a two-year study on leadership. Highest performing teams had psychological security. It was okay to make a mistake.
 - When I moved from Sandia to high tech, it was a big change. Taking risks are part of the tech culture. There are lots of mistakes in the tech world,
 - Do a "no fail" postmortem. No blame. Allows for creativity, strategic thinking, sticking your neck out without fear of getting it cut off.
- Broaden and Build Mode
 - Trust, curiosity and confidence help broaden the mind and build a stronger, more resilient team.
 - What situations have been in where you felt unsafe? What did that feel like?
 - Now think about environments where you felt safe and protected? What did that feel like?
 - When I interviewed at Sandia, that was the first time I had been to New Mexico. I took a wrong turn out of the airport and got into a bad neighborhood.

At the interview, a group took me out to lunch. The team was scared by a leader who managed by fear. I decided this team needs me; they need someone who understands what they've been through.

- I had to immediately put into a place a new leadership structure. In order for the team to trust those new leaders, they needed to know they were vulnerable.

Google is often in the news. We are unpopular in a bi-partisan way. We are in a complex environment; can't rely on old patterns. We have to be really good at understanding what's in front of us and responding appropriately. What patterns are emerging, and how do we solve for them. Opposing views can both be true!

Humor increases solution thinking and creativity. When the workplace feels challenging but not threatening.

In addition to hiring the best people, we also have to take care of the talent entrusted to us. We need systemic approaches that hold up over time.

Development, Progression

- If we don't focus on these, our employees will either leave or stagnate.
- Do you understand the talent gaps in your team? Do you know what motivates each individual? Do they know how what they are working on contributes to the entire organization? Do you regularly give them feedback, mentoring, encouragement?
- A critical part of building diverse teams is giving feedback. Companies with diverse teams perform better, but constructive feedback is essential.
- Implicit bias can creep into feedback. Inherent bias and prejudices we are not even aware of. How do we prevent this from happening?
 - Who do you give the most helpful feedback to? Those who are the most like you? Research shows the diverse employees often don't get the feedback they need.
 - Protective hesitation. Failure to give feedback for fear of being sexist or racist. Feedback gets watered down. They don't know what to do differently.
 - White men get more specific feedback on what it takes to get to the next level.
 - Only 14% of women are satisfied with the feedback they get on the job.
 - It can be really uncomfortable to give feedback to those different from us.
 - The real reason is you don't have an authentic relationship with that person. You have not had the courage to jump in and develop that relationship.
 - I have a team of retention case managers. People who get referred to us have one foot out the door. We've been able to retain over 70% of them. Universally, they do not understand what's expected of them and how they are doing against those expectations. Have not received specific, actionable feedback.
 - We incorporate what we've learned into our leadership training.

Retention

- Attrition correlates with belonging. People don't leave companies; they leave managers.
- Are we aware of the privilege we have and are we lending that privilege to others.
- Be aware of who's in and who's out and how we can make that person can be included. It won't be forgotten! You will have made a major impact on that person.
- Mentoring and providing sponsors
 - Regularly talk about talent and skills of our employees to others in the organization to encourage mentoring

New Member Presentations

Jim Fox, Membership Director



First: a new benefit for CMMA members!

Member Deals

- A source to purchase deeply discounted tickets and experiences
- Discounts as high as 60% off
- Focused on family themed entertainment products
- Available exclusively to CMMA Members and Partners
- There are no membership fees or hidden charges
- [Member Deals](#)
 - Has been around 17 years
 - Has a 250-person customer service team
 - Are the merchant of record

How to access this benefit:

- Log in to the CMMA website
- Click on *Member Deals*
- On next Landing Page, select *Access Your Deals*

On site right now:

The screenshot shows the CMAA website homepage. At the top, there is a navigation bar with links for 'About CMAA', 'Members', 'Partners', 'Events', 'Blog', and 'Member Development'. A search bar on the right says 'NEED HELP Quick Find'. Below this is the CMAA logo and a 'MemberDeals' banner with the text 'EXCLUSIVE MEMBER ONLY OFFERS'. A secondary navigation bar lists categories: 'CHOOSE A CITY', 'HOTELS', 'THEME PARKS & ATTRACTIONS', 'MOVIE TICKETS', 'CONCERTS & SHOWS', 'SKI RESORTS', 'RENTAL CARS', 'GIFT CARDS', 'SHOPPING MEMBERSHIPS', and 'PREFERRED ACCESS™ Sports, Concerts, Major Events & More'. The main content area features a large banner for 'NFL SEASON IS HERE' with a 'BUY TICKETS!' button. Below this are three smaller promotional tiles: 'THE LION KING', 'GO WILD! KIDS FREE ALL OCTOBER', and 'NO TRICKS JUST TREATS'. To the right, a box titled 'AMAZING OFFERS THIS WEEK' lists several deals: Halloween Deals (save up to 50%), SeaWorld Orlando - Halloween Spooktacular (save up to 60%), Wicked | Orchestra Seating from \$89, Knott's Scary Farm (save up to 55%), Goodsprings Ghost Hunt Tour (save \$30), and NFL Season is here | Get your tickets now. At the bottom, there is a social media bar with the text '@CMAA1 | #cmaSanDiego | #cmaCONNECT'.

New Members

The image shows a map of the United States divided into six color-coded regions. Callout boxes identify new members in each region: Adam Haviland (Northern Region, blue), Tim Malick (Central Region, orange), Robin Martin (Western Region, green), Stephane Aknin, Peter Safran, and Michael Weinstein (Eastern Region, purple), and South Central Region (red) and South East Region (brown). The map is set against a white background with a blue border. At the bottom, there is a social media bar with the text '@CMAA1 | #cmaSanDiego | #cmaCONNECT'.

Adam Haviland

**Production Strategist & Executive Producer
Best Buy—Yellow Tag**

- 16 years with Best Buy
- Small business owner for 12 years
- Raised in northern Minnesota
- Married for 11 years to high school sweetheart
- Father of four: 7, 6, 2, newborn

About my role

- Manage internal production resources
- Meet with clients to understand their needs
- Work on hundreds of projects per year
- Streamline processes & efficiency
 - Balancing schedules
 - In-house or outsource
- Industry benchmarking & forecasting
 - 360 video
 - Workflows

What I hope to get out of my CMMA membership

- Networking opportunities
- Best practices
- New & innovative workflows
- Engaging production convos!



Robin Martin

**Senior manager, Multimedia Production & Events
The Save Mart Companies**



Personal:

- 2 sons
- 2 cats
- One husband
- Love the outdoors: run, hike sail, fish, backpacking

More about me

- Prior to working at Save Mart I worked at Safeway for 33 years and was the Director of Video, Broadcast and Satellite Support in my last role with the company.
- I am a former CMMA member and am thrilled to be back.

Save Mart

- Based in Modesto, CA
- Operate 207 Stores in Northern/Central California & Northern Nevada
- Over 14,000 Employees
- Annual Sales of 4.2 Billion

About My Role

- Started in February 2019
- Built department from the ground up
- 3 direct reports
- Multimedia Production, AV & Events

- My multimedia department runs the broadcast studio, develops & produces all internal video communications and provides AV support for all corporate meetings and events.

What I hope to get out of my CMMA membership

- Professional development
- Networking
- Stay current on new trends

Michael Weinstein

**Global Video Studio Lead
Deloitte**



About Me

- Video journalist at US News & World Report
- Comedy Cures Foundation
- Deloitte since 2009
- Huge foodie
 - Have worked at a culinary school
 - Part-time personal chef

About my role

- I lead the Deloitte Global Video Studio, which acts as the multimedia arm of the global brand team, and produces much of the content (video, live-streaming, animation, etc.) especially at the executive level.
- Our team consults on the on end-to-end video creation process for internal clients. We also do produce some external content, especially when it's across the broader Deloitte network.
- Upskill Deloitte people across member firms, with events such as the Deloitte Global Multimedia Summit and Creative Week.
- As we sit in Brand, our mandate is also to make sure video content across member firms is on brand.

What I hope to gain from membership

- I look forward to connecting with other members of the CMMA, especially to connect around the power of video for the enterprise.
- I hope to find a mentor and be able to share industry trends with other communications professionals.

Pete Safran

AVP, Creative

Lincoln Financial Group



Personal:

- 3 kids
- They all want to be in front of the camera
- I put more money into their training instead of buying insurance
- Tried to make it as a musician, did not succeed

About my role

- 25 creatives
- Everything Lincoln
- Lincoln has 12k people in 11 locations
- We produce everything in-house except commercials

What I Hope to Gain from Membership

- Ideas
- Innovation
- Comradery
- Friendships
- People who talk our language

Wish I had found you earlier!

I'm so happy to be here.

Tim Malick

EJ Agency Leader—Branding & communications

Edward Jones



About me

- Love vinyl records
- Wife Tammy is a sports fanatic
- I know nothing about sports

About My Role

- Been with Edward Jones 25 years
- Every single day I get to work with a very talented group
- 35 people
 - Creatives
 - Technology

- Agency partners

What I hope to get out of my CMMA membership:

- I'm here to listen and maybe add a small grain to help you as well.



Stephane Akin

**VP, Creative Director, Pru Productions & Creative Services
Prudential Insurance**

Born and raised in Paris, France
Moved to US 6 years ago
With Prudential 1 year

Married with two kids
My son is applying to college currently
Daughter is a high school freshman

Avocations:

Tennis

- In a national tournament; we made the final four
- Lost to the Utah team

Marketing my wife's art

- Using augmented reality video to connect the public with her art

My role

- Part of global communications team
- Manage a multidisciplinary team
 - Events
 - Videos
 - Design: graphics & brochures
 - Digital assets

What I hope to gain from CMMA

- Outside perspective
- Metrics and performance ideas

- Networking, both peers and vendors



Keynote

Rick Eldridge
CEO-Producer, ReelWorks Studios

I'd like to talk about my experiences. I started in the music industry. I was in a studio in Orlando, Florida. I was directing the Florida symphony, and someone asked if I had ever scored a movie. That led to scoring a movie, and the score won some award. Next call came from Disney. Universal came to me about the same time. I was in the right place in the right time to move into a studio.

Sometimes our career moves happen naturally. Sometimes we fall on our faces. I turned down a project from Universal because it was so awful I didn't want my name on it. I leased some space halfway between Universal and Disney. Got a phone call in my car from Universal. Gave me the opportunity to run my business out of their facility. I chose my own projects with first refusal on their projects and whatever other business I could get. Did productions at Disney while at Universal.

Bought one of the first digital recorders. [SyncLavier](#). Cost about a million dollars. Fascinating stuff. That got me into the digital age. Next call from Disney they wanted help with their parade music. They used looped tapes; incredibly complicated and hard to program. They wanted to go digital. We put together the digital audio program for the Disney parade—programmed from Universal Studios. I had to rent an office across the street so I would have a business address other than Universal in order to invoice Disney. I was never there; just checked my mail once a week.

I grew up in the business in Orlando. It was an exciting time—a lot of fun!

Produced a music variety show for kids. Backstreet boys were in the show. Show was successful and led to an offer I couldn't refuse to buy my company. I had two years to figure out what to do next.

Moved back home to Charlotte. Got a call from a company that was in the process of being bought out by Disney. Worked with them on a contract basis. Still trying to figure out what to do with the rest of my life.

Met another guy in a similar situation who had sold his business. He became very depressed without the identity of his business. Wrote about success versus significance.

W

I wanted to do something significant, but also wanted to do what I knew best and enjoyed. Opened another studio in Charlotte. Slow start.

Met with some potential clients who had just gotten back from the Masters Golf Tournament. Asked me if I had ever thought about making a movie about Bobby Jones. Contacted the person who had the rights. About 19 mil later we had our first movie. Phenomenal experience to produce a feature movie.

Producing the film

- Was told it would be boring, because Bobby never did anything wrong.
- Played in theatres, then bought by the golf channel. Every time it rains I make money because they play my movie!
- Had three actors playing Bobby Jones to cover his life. Looked all over the country for the young boy to play Bobby and found him in Georgia right near where we were shooting.
- Bobby learned to play golf watching adult golfers on the course.

With every movie we made, we found a way to give back to some charity. That has always been important to me.

One of our movies, which is now on the Hallmark Channel, was shown at over 300 charity events before it was released and generate millions of dollars for those charities.

Q&A

Q: Tell us what Reel Works is working on now.

We have evolved over the years. We are more of a content creator now, and go a lot of places to shoot. We've stopped staying on the technology path. Three projects in process now: a holocaust survivor, a Hamas defector, which is a story about love vs. hate, and another golf story. Also a theatrical cartoon about a manatee, which is about two years out.



Q: What kind of mentoring are you doing to help the next generation coming up?

Started a school in Grand Rapids, Michigan, for up and coming creatives. Encourage young people all over to follow their dreams and do what they really love. Tell stories. Learn the process. Do it over and over again. Learn, stumble, pick yourself up and start over.

Q: I was interested in phrase you used: success to significance. How might we interpret this in our corporate lives?

Wherever you work, you can look for opportunities to make a difference. Care about your team and make their lives easier and better. Servant leadership.

Q: Did you ever have a challenge you did not know how you were going to overcome?

I've had many. The Bobby Jones story was one. I had never been responsible for so much money. We were in Scotland and got a call from the guy who needed to write the check to pay for the rest of the movie. He was on his way to jail for film fraud. Then I lost my distributor!

Q: What celebrity you've worked with made the most impression on you?

Steven Spielberg. I saw in him a real caring for everyone he worked with. He never raised his voice. He just got it done. Carried coffee and directed the movie.

Q: What do you see as the parallels between movies and video games?

Video games are a new way of telling stories. Back stories are getting very important. And the stories can have multiple endings depending on the player. Definitely a thing of the future.

Note: Most of Rick's presentation consisted of clips from his movies, which are not reproduced here.



Building a Culture of Innovation

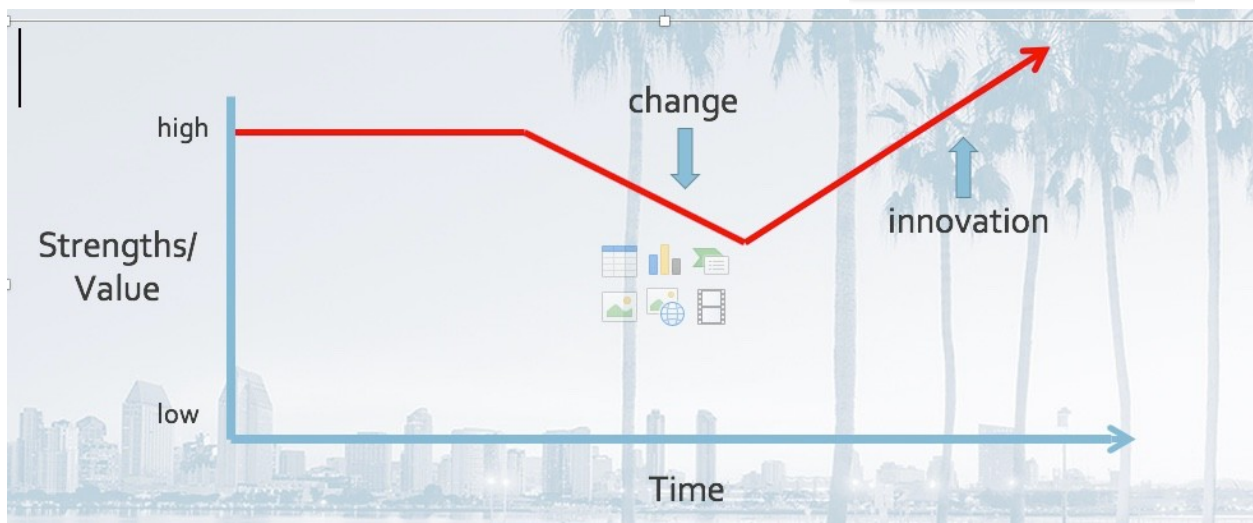
Member Case Study

Greg Sneed, Mayo Clinic



Making a Case for Innovation

- Sounds strange, but not everyone wants innovation!
- Employees may do a great job, but some are content with things as they are.

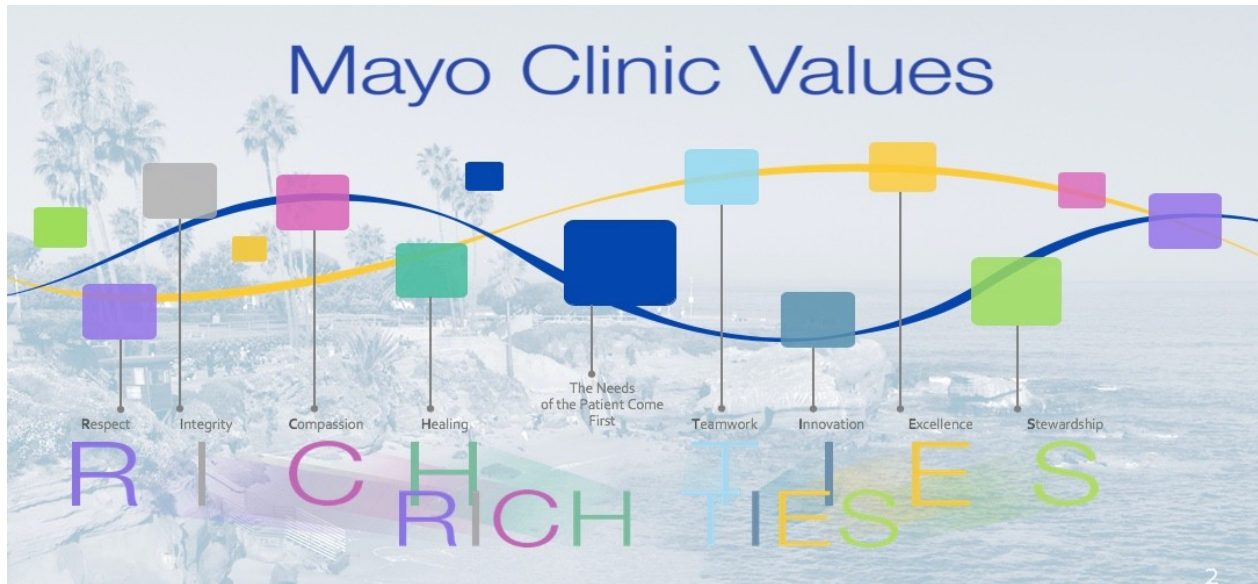


What are your current strengths as a department?

- Marketing strategies...technology...something comes along to degrade your strengths.
- With innovation you can move beyond where were you were before and add new value.

Is innovation a value at your organization?

- Most organizations have a vision and mission: what you do and why do you do it.
- Values: How we should work



Barriers to innovation

- Cultural
 - Permission to fail
- Behavioral
 - Change is scary
 - People shut down ideas
- Leadership
 - I don't judge you, but I might classify you
 - Creative/not creative
 - Be careful; you may prescribe how people act
 - Innovation is a skillset; a competency

Making a case: Overcoming barriers to innovation

- Structure precedes outcomes
- No time to be innovative within the structure

A Case Study: Innovation Community

Who?

- Diverse membership
- Different levels within the organization
- From truck driver to senior executive
- Different business lines
- Different geographic locations

What?

- First thought: go out and solve everybody's problems. No!

- Created Executive Summary
 - Mission: Our mission is to inspire innovative solutions by encouraging the education and the creativity of Media Support Services staff.
- Guiding principles
 - Inspire people and their creative ideas
 - Encourage education
 - Model an innovative mindset
- Goals
 - Executive communication plan
 - Executive sponsorship (top/down)
 - Middle management (horizontal)
 - Grassroots (bottom/up)
 - Develop curriculum
 - Metrics
 - Leading/laging indicators
 - How do you measure innovation?
 - Classes completed
 - Consults delivered
 - IC members making the case for innovation
 - Senior leadership seedstories
 - Lagging indicators
 - Number of innovations introduced by staff as a result of focus on innovation
 - Tier levels
 - Tier 1: Incremental process improvement for time, cost, quality for product, service or process.
 - Tier 2: Incremental process improvement or new product, service, or process with a positive, measurable ROI for time, cost, quality.
 - Tier 3: Process improvement or new product, service, or process with a positive ROI meet or exceeding thresholds measure by:
 - TIME savings of at least .5 FTE/year (1000 hrs.).
 - COST savings of at least 1% of unit budget/year.
 - QUALITY improvement that receives 80% thumbs-up/positive impact.

Q: How long did this take you to put together?

For a couple of years in Arizona only. We were just into fixing problems at first. Then I decided to open it up to other locations and the ideas just came flowing in.

The 3-tier innovation concept is brand new. A year from now, I can give you an update.

Q: What is your feedback loop for uncovering new ideas?

Hasn't fully evolved yet. We're looking for teams to bring back stories and hard data.

Q: We've dabbled with innovation a bit. Have you thought about giving innovators some kind of reward? We had problems with people saying, hey, I saved the company half a million dollars, and I got nothing for it.

So far, this has not come up for us. It may down the road.

Q: When you look at innovation you find yourself trying to solve problems. Is that your focus?

We want people to solve problems within their own division. We want to change culture. We are encouraging people to take classes, talk about innovation, and not assume we should continue to do things a certain way because we always have.

Q: What are your thoughts about ideas that come up outside your innovation team?

It's not formal. This is part of the grassroots focus. Have conversations with teams and get those ideas.



CMMA Leadership Forum

Greg Sneed, Mayo Clinic, Moderator



Let's start off with metrics again. Partners, do you have products that are good at metrics that we don't know about.

Kaltura

Some of our customers don't want everyone in the company to see their metrics. They can be used for good or for evil. They want us to handle this for them so they can select what they want to use.

Bank of America. We have different systems with different reporting capabilities. We wanted to tell a story with our metrics. Various KPI's that our customers wanted. Started using this tool called [Tableau](#). Gets people data for us.

Alpha Video

For videoconferencing, we track lots of data and can mine it. Not who is using the conference, but how well are they are using it. We can identify issues and make the rooms easier to use.

Highstreaming

Analytics really are critical. Our video distribution software captures analytics from many different sources, both at the network level and the event level. Valuable to IT and production side.

How many companies right now are using data about their clients to help drive their business rather than using metrics at the end?

We constantly look at our customers and how they interact with our products. We use AI for this.

Analytics are great, but anyone dealing with this situation. How do you benchmark some of what you do? Brochures, for example. Or suppose you sent a video to 3000 people and 300 people watched it. Is that good, or a failure? We want favorable stories.

We are making a strong evolution. First comes data; then you are overwhelmed with data; then you try for analytics. We don't get the absolute values that we might want, but at least we can see trends.

What experience do you have on-boarding your new manager unfamiliar with your business?

Is this individual approachable? Can you sit down and have a good conversation with him?

No silver bullets here, but we had a new manager about a year ago. Came in from technology; much different culture. When I challenged his proposals, my ideas weren't accepted at first glance. Sometimes I had to go back three or four times and approach the topic from a different direction. Persistence can help.



Encourage him to get feedback from others; don't put it all on yourself.

I approached a new manager with the "why" of what we did and how we did it. That helped.

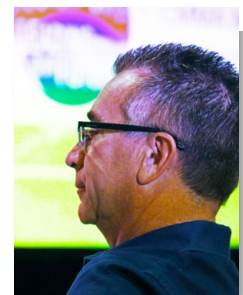
A new manager will be nervous about who she can trust. I think you need to be very direct with who the key players are.

To really understand a team and how they operate, it takes time. Maybe three years.

I'm reading a book called [Never Split the Difference](#) by a hostage negotiator. A lot of times people just want to be heard. Repeat back to them what you hear, repeatedly. The goal is to reach a compromise where the person thinks it's their idea.

How do you deal with variability of skillsets? Some people do a good job, but they're fixed. The transformational employees get better and better; the others plateau. There's always been a gap. Any personal development success stories to share?

I've got a young employee just does exactly what you ask her to do. I have a high performer as well, and I spend way less time with that employee. I try to look for things she does really well and call her out for that to encourage her to be more proactive and follow her passions. She's much more engaged and she has grown.



We have an axis with development at one end and business expectations at the other. And the line always rise. If they are not moving along with the firm's expectation, that's where we need to start honest conversations.

It's even harder when you inherit an employee with 10 years of positive evaluations!

Some people love where they are, and don't want to move up.

I ask people: If you were to leave the company, what kind of job would you want to go to? Then I try to find ways to make their job grow into what they want.

It doesn't make sense to have someone working for you who really wants to do something else. I don't want people who are halfway committed.

We tend to tell our people what they should do... what position they should try for... what training they should get, rather than let them talk about what they want.

We have mentors assigned to all our employees. The folks who are not as motivated are assigned to someone who really passionate and motivated. It helps pull up the lessor performer.

This is a competitive business. You're lucky to be here!

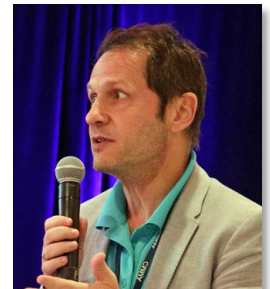
When you inherit people who have been there a long time, and some are capable and some are not. You want them to be better! I don't have a solution. But at some point, you have to make sure you're covered.

I spell out the expectations I have for them. Can you meet them? Sometimes they decide they don't want to and leave. Others are very happy to be asked.

Honest conversations are critical. Give employees time to decide. Ask them how long they need to decide?

The way to create a high-performing team is to hire high-performing people. I can ask my team all day to get to the next level, but they respond better to peer pressure from higher performers.

[Culture Index](#) is a tool to give you a snapshot of who you are as a person, and a snapshot of how you perform at work. Work behavior may work against who you really are. The snapshot at work only good for a period of time; then needs to be repeated. Excellent tool for staff development.



Leadership Perspectives on Managing Workplace Culture

Mark Hyde, MA, CEAP

Director Employee Assistance Program, Mayo Clinic

My background is diverse. Started in alcohol and drug rehabilitation, Allstate Insurance Company as a manager at 24 (I failed miserably)...saleswork...back to school....

Then worked for a company consulting on teamwork. I learned if I fed people I would get good reviews. I basically repackaged things I had learned, not experienced. I thought I was doing well. Then I joined Mayo. About 3 or 4 years I did teamwork stuff, but when I followed up later the traditional techniques did not last.



I'm not going to change issues in a group. Someone else can't fix problems in your team. Wrong approach. People come to me as a last resort. What do I do right now?

The outcome of a lot of failure was a whole new perspective on working with people.

I've been doing this talk for almost 16 years. I only show what works. Here's what works. I've tried everything, and this is the only approach that works.

Agenda

Human Behavior

- Diverse thoughts and actions
- So many leaders crumble over getting people to change and work together
- People are tough to work with!

Teamwork vs. Work Culture

- Most mixed up culture in every organization I've worked with

Teach Employees, "How to Complain"

- Open-door policy is good, but need parameters around it

How to Conduct S.A.F.E. Tough Employee Conversations

- Crux of the work of leadership

Human Behavior

- Enormous complexity of a thought
 - So hard to change someone's perception who doesn't want to change
 - Not only DNA, but experiences, traumas, positive and negative experience

- Diversity of opinions and feelings
 - You want people on your team with differences of opinions and feelings
 - Also brings great headaches!

The core problem with organizational management: the small percentage of people who are not in sync with the team.

Teamwork: a Mixed-up Concept

Hyde Teamwork definition:

- make everyone successful
- focus on results, not feelings



Here's a great illustration of teamwork:

One guy catching the ball, another in position to back him up if he misses.

- Teamwork is all about job duties, tasks, roles, protocols, skill, equipment, knowledge, etc. Impacted by behavior.

Work Culture: Employee *behavior* in both words and actions

- This is okay and this is not okay within our team
- No matter what someone's personality and style, you still have to know what's okay and what's not
- Words matter.
- Work Culture refined by the organization
 - Otherwise, diversity of thought will take over.
 - Individuals will tell you what the culture *should* be!

- Different cultures in different teams, but all must be responsive to overall company culture.
- Employees behave in accordance with the style of leadership provided
 - Don't always have to understand human behavior; you need to know how to manage that behavior.
 - Leaders need to be specific about behavior, and it has to change now. You can't fix it; the employee has to.
 - Okay to tell the employee you don't know how they will make the change, but your job is to hold them accountable.
- Work culture changes when you change undesirable employee behaviors
 - Companies need unified approach about how we manage people
 - Don't let anyone talk to your group about teamwork unless you know exactly what they are going to say. They may have good intentions, but do more harm than good.
- Most common responses from HR and Corporate Leadership
 - Need more communication training
 - Not helpful in conflict situations
 - Not a communication problem; it's a perception problem
 - What's right or wrong
 - We're talking about a small percentage of people; they take up way too much of yourself
 - Need more education on personality styles
 - No, I don't think so. Work well with most people, but with others will not help at all.
 - Can't change someone's personality!
 - Focus on behavior, not personality

An Absolute Must

- Always try to help an employee with a performance deficiency.
- Don't help employees fix bad behavior—manage it out instead.
 - Need an uncomfortable conversation that makes accepted behavior clear
 - That will motivate them to change

Teach Employees How to Complain

Open door policy is fine, but tell the employee to think about these things before you come talk to me:

- What or who is preventing them from doing their job?
- Behavior may place company in jeopardy—business/compliance/legal/safety
- What is annoying them? Wide open for anything.
 - This is what causes the most problem
 - Everything from the temperature in the room to using too much toilet paper

- We put people into too close together environments, and everyone observes everyone else's behaviors.
- You don't have to agree with them; you have to respect their feelings.
- Suppose someone storms in your room and slams the door. Your response:
 - Unless someone is dying, don't ever come into my office and slam the door.
 - Compassionate leadership is not giving everyone everything they want, but being open and honest even when you disagree.

When to have official employee conversation

- Historical behavior
- Several occurrences
- Little to no employee accountability

When to have unofficial conversation

- Not historical
- Never been called out by leadership

S A F E The Manager/Employee Conversation

S = Share your hopes and expectations for all staff

A = Aware of issues and concerns you have

F = Future, starting now & needs to look like...

E = Extend invitation to make needed changes

- It's not about feelings; it's about behavior leading to new feelings. Always with respect and caring.
- Whether or not the employee knows they need to change is the key.
- You can use this formula for performance as well as behavior.

Set up the meeting for a specific time and place.

Don't tell why you are meeting. "I'll let you know when you come."

Make sure you have already worked with HR and management so everyone is on the same page. You know this is the right intervention.

"Today might be a little different kind of meeting. I want you to just sit and listen and not ask any questions. You will have a chance to respond, but not now."

S:

- Generalized hopes for everyone on staff. "I care about you and your success as an employee."

A:

- Bring up the issues and concerns that you have
 - Specific behavior you have observed

- If they ask for examples, you have to interrupt them and not let them talk

F:

- Specific behavior (or performance) that has to stop, now

E:

- “You may not agree with me, but in fairness to the group you need to change.”
- “I don’t know how you will make these changes, but you must to be successful here.”
- Can’t change who the person is; just be clear on expectations

Q and A

Q: When people on my team complains about someone else, they don’t want me to do anything because they’ll know I told you.

Very common. Don’t allow this. That’s my employee, and I may have to respond. Don’t promise confidentially. “I’m an agent of the company and I make have to take action.”

Q: I feel bad when I hurt their feelings. I tend to soften the blow and undermine my efforts.

You have to let your conversation stand. Make sure you have stated caring for the person. If you approached the conversation compassionately, then stay strong.

Q: How would you handle a situation when you are trying to articulate behavior issue and they are in denial, or insist on knowing who told you?

If you’ve seen the behavior, say so. Or say there is credible evidence. “I know you don’t agree, but I see it that way and will continue to manage you that way.”

Q: How does peer-to-peer accountability fit into this?

That’s another talk. Co-worker to co-worker, there’s only so much you as the manager can do. That’s another conversation.

Q: What if you see some immediate change, but in a few months the behavior comes back?

Yeah, the paint isn’t dry yet. The difficult conversation is just the start. People will challenge. Have another conversation. The kind of conversation depends on the severity of the offense. Put fear into them and the change will happen. Sometimes that’s the only way. People will exit on their own if they can’t make the change. A few you will have to exit.

Q: Culture within a culture. Some teams are more difficult to work with than others. What’s our responsibility towards teams who do not report to us?

Different managers manage differently. Must be a top-down approach. Everyone must know expectations for the entire group/company, and how to address to negative behavior. Who's holding who accountable; always comes back to that.

Fascinating Facts about our Presidents: A Study in Leadership

Richard Lederer



Editor's note: *If you have ever heard Richard Lederer speak, you know how difficult it is to take notes on his presentation. Thanks to Richard for providing me with a transcript of his presentation, which is reproduced below.*

When George Washington became President in 1789, other national leaders included the king of France, the czarina of Russia, the emperor of China, and the shogun of Japan. Today, no king rules France, no czar rules Russia, no emperor rules China, and no shogun rules Japan. But the office of President of the United States endures.

“When I was a boy, I was told that anybody could become President; I'm beginning to believe it,” quipped Clarence Darrow. Very few nations have a governmental system that allows anyone to become the leader of the country, in this case, the most powerful in the world.

Our presidents have been highly educated and barely schooled: Woodrow Wilson earned a Ph.D. in Political Science from Johns Hopkins University, while Andrew Johnson never attended school but was trained as a garment maker and wore only suits that he himself had custom tailored.

Our presidents have been filthy rich and dirt poor, generals and civilians, professional politicians and utter amateurs, sober as a judge and drunk as a skunk, eloquent and barely articulate, handsome and plug-ugly. In the past century alone, the White House has been occupied by the son of a Presbyterian minister, a schoolteacher, a peanut farmer, a failed haberdasher, a former actor, and the son of a failed California lemon rancher.

Virginia, Ohio, New York, and Massachusetts have furnished most of our chief executives, but such widely scattered states as Vermont, Georgia, Tennessee, Missouri, Michigan, and California have also sent native sons to the White House. Forty-three *men* (Grover Cleveland, for some bizarre reason, is traditionally counted twice) have been President of the United States.



The framers of the Constitution could not have envisioned the power that the president now holds to influence world and domestic affairs. Our forefathers and foremothers could not have dreamt that presidents would be the subjects and objects of so much intense interest in their philosophies, opinions, policies, and personal lives.

Our second and third presidents – the only two presidential signers of the Declaration of Independence – John Adams and Thomas Jefferson, political rivals, then friends, both died on July 4, 1826, exactly fifty years after the Declaration became official.



As Jefferson lay weak and dying in his home in Monticello on the evening of July 3, he whispered, “Is this the Fourth?” To quiet the former president, his secretary, Nicholas Trist, who was also his grandson-in-law, answered, “Yes.” Jefferson fell asleep with a smile. His heart continued to beat until the next day, when bells rang out and fireworks exploded for the Fourth.

At dawn of that same day, Adams was dying in his home in Quincy, Massachusetts. A servant asked the fading Adams, "Do you know what day it is?" "Oh yes," responded the lion in winter. "It is the glorious Fourth of July." He then lapsed into a stupor but awakened in the afternoon and sighed feebly, "Thomas Jefferson survives." He ceased to breathe around sunset, about six hours after Jefferson.

Who was the youngest man ever to have served as President of the United States?

If your answer is John Fitzgerald Kennedy, you're slightly off the mark. When he took office, Kennedy was, at the age of forty-three years and seven months, the youngest man ever to have been *elected* president; but Theodore Roosevelt became president at forty-two years and ten months, in the wake of the assassination of President William McKinley. When TR's second term was over, he was still only fifty years old, making him the youngest ex-president.



Bill Clinton was our third youngest president (forty-six years and five months), followed, surprisingly, by Ulysses S. Grant (forty-six years and eleven months) and Barack Obama (forty-seven years and five months).

Now that you know the identity of our youngest president, who was our oldest president?

The average age at which America's presidents have taken office is fifty-four. Ronald Reagan became president one month shy of his seventieth birthday, older than any other president, and left office one month shy of his seventy-eighth. Before Reagan, Dwight Eisenhower had been the only president to reach the age of seventy while in office. Our current President, Donald Trump, is 73.



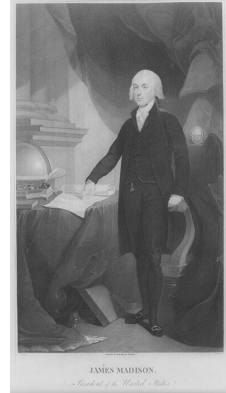
As of October 2019, Jimmy Carter is our longest-lived president. He is 95.

Who were our tallest, heftiest, and most compact presidents?

Abraham Lincoln, at six feet four inches, was our most elevated president, but at six feet and 300-340 pounds, William Howard Taft was our bulkiest president. After he became stuck in the White House bathtub, Taft ordered a new one installed that would accommodate four men of average stature. Although Taft was our most portly president, he was considered a good dancer and a decent tennis player and golfer.



At five feet four inches and weighing about a hundred pounds (less than a third of Taft), James Madison was our most compact president. The author Washington Irving described Madison as “but a withered little apple-John,” but another observer marveled that he had “never seen so much mind in so little matter.” In fact, Madison is probably our only president who weighed less than his IQ.

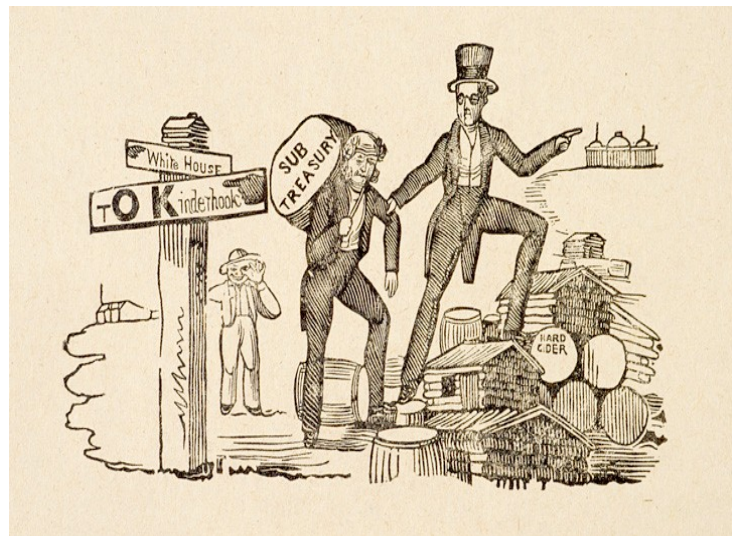


Have any of our presidents not been born citizens of the United States?

Yes, eight of them. Martin Van Buren, our eighth president, entered the earthly stage on December 5, 1782, making him the first president born after the Declaration of Independence was signed and thus a citizen by birth. Eight presidents were born before 1776 as British subjects in the American colonies — George Washington, John Adams, Thomas Jefferson, James Madison, James Monroe, John Quincy Adams, Andrew Jackson, and, after Van Buren, William Henry Harrison.

Do you know when the term OK became part of the American lexicon?

Martin Van Buren, elected our eighth president in 1836, was born in Kinderhook, New York, and, early in his political career, was dubbed "Old Kinderhook." Echoing the "Oll Korrekt" initialism, OK became the rallying cry of the Old Kinderhook Club, a Democratic organization supporting Van Buren during the 1840 campaign.



The coinage did Van Buren no good, and he was defeated in his bid for re-election. But the word honoring his name today remains what H. L. Mencken identified as “the most shining and successful Americanism ever invented.”

Teddy Bears

Stuffed bears were popular before President Theodore Roosevelt came along, but no one called them teddy bears.

Not until November, 1902, when the president went on a bear hunt in Smedes, Mississippi. Roosevelt was acting as adjudicator for a border dispute between the states of Louisiana and Mississippi. On November 14, during a break in the negotiations, he was invited by Southern friends to go bear hunting. Roosevelt felt that he could consolidate his supporters in the South by appearing among them in the relaxed atmosphere of a hunting party, so he accepted the invitation.



During the hunt, Roosevelt's friends cornered a bear cub, and a guide roped it to a tree for the president to shoot. But Roosevelt declined to shoot the cub, believing such an act to be beneath his dignity as a hunter and as a man: "If I shot that little fellow, I wouldn't be able to look my boys in the face again.'

That Sunday's *Washington Post* carried a cartoon, drawn by Clifford Berryman, of President Theodore Roosevelt. T. R. stood in hunting gear and with rifle in hand with his back turned toward the cowering cub. The caption read, "Drawing the line in Mississippi!" referring both to the ethical issue and the border dispute.

Now the story switches to the wilds of Brooklyn and Morris and Rose Michtom (rhymes with *victim*), Russian immigrants who owned a candy store where they sold handmade stuffed animals. Inspired by Berryman's cartoon, Rose Michtom made a toy bear and displayed it in the shop window. The bear proved enormously popular with the public, and the Michtoms began turning out stuffed cubs labeled Teddy's Bear, in honor of our 26th president. As the demand increased, the family hired extra seamstresses and rented a warehouse. Their operation eventually became the Ideal Toy Corporation.

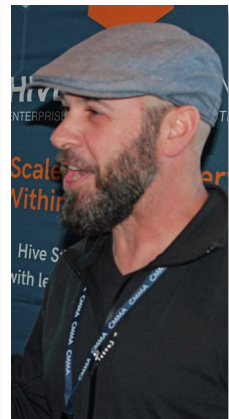
When the Michtoms wrote President Roosevelt for permission to confer linguistic immortality upon him, T.R. replied, "I don't know what my name may mean to the bear business but you're welcome to use it." Clifford Berryman himself could have made a million dollars had he chosen to sell his idea to a toy manufacturer, but he refused: "I have made thousands of children happy; that is enough for me."

Historian Henry Adams, the grandson and great-grandson of presidents, wrote that the president "resembles the commander of a ship at sea. He must have a helm to grasp, a course to steer, a port to seek." The voyages that our American presidents have steered on the ship of state are some of the brightest adventures that any nation has experienced since the dawn of civilization.

Photo Album

Principal photography by Pete Pallagi, Mayo Clinic, with contributions from several other CMMA members















Conference Co-Chairs Jessica Ferguson, City of St. Charles, Missouri, and Steve Tingley, American Family Insurance, with President Gregg Moss, Bank of America



The entire conference team—thanks for an excellent job!



**President's Award: Board of Directors Recognition
 Doug Salmela, 3M; Warren Harmon, Mayo Clinic; Jim Fox, Merck & Co., Inc.; Richard Wood, George Mason University**



**Keating Opportunity Scholarship
Peter Safran, Lincoln Financial**



**President's Award: "Unofficial Certificate of Awesomeness"
Greg Sneed, Mayo Clinic**



Career Recognition Award: Dave Leonard, World Bank, retired



Outgoing President Gregg Moss recognized CMMA's Executive Director, Marv Mitchell



Gregg was honored for his two terms as CMMA President with an Outstanding Member Service Award and, appropriately, his very own gavel, presented by incoming President Susan Kehoe, George Mason University.

See you in Milwaukee 2020!