



Blurring the Lines

Five Steps for Managers to Create an Agile Workforce

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SOLUTIONS

It was April of 2008 when I realized that the workforce expectations were truly changing. I was a senior director of talent for a global retail organization and it was time to conduct performance and compensation reviews, a task that I had done every year for the past 25 years in my various manager and leadership roles. Everything seemed to be going along as normal – discussing strengths, accomplishments, areas of opportunities and goals for the next year; save one employee who entered my office to discuss his year-in-review.

The agenda and formalities of the meeting went as planned; however, at the end of the meeting and after receiving top performance marks for the year, I revealed his merit increase. To my surprise, instead of signing the evaluation and accepting the (very generous merit increase for a retail organization), he pushed the form back across the table. What happened next, I had never experienced in all my years of managing and leading teams. He told me he would give back the merit increase if I could give him one more week of vacation. My traditional experiences in business and HR did not initially comprehend his request as he would be giving up more in compensation than he would be gaining in another week vacation; not to mention the compounded long-term financial gains. Instead of reacting, I simply asked the most obvious question - “Why?”

It might be good at this point to mention that this employee is a millennial and what I would traditionally value as compensation for great performance was not necessarily what his generation values as reward for a job-well-done. He answered my question by stating that he and his newlywed wife really valued travel and experience and wanted to do as much of that as possible before starting their family. His request was that I check with HR if they would be willing to do this and come back to him. He assured me that if the company could not do it, he would accept the merit increase. As you can imagine, in 2008 the concept of flexible work agreements and agile workforce was new and to a +40-year old retailer the concept was completely foreign. Not only did HR and leadership deny the request, the employee accepted the merit increase and left the company within the month. Since that moment, I have questioned the organizational effectiveness of rigid (one-size-fits-all) policies, practices and organizational hierarchies.

Fast-forward to 2019 the need for organizations to create an agile culture and design work to meet the expectations of an ever-changing workforce goes without saying. If there is any doubt one only need to look to the research conducted by major consulting firms such as McKinsey, Gallup, CEB and the like. In an October 2018 Forbes blog by Jeff Wald, Jeff provides “7 Reasons To Prioritize An Agile Workforce In 2018” citing reasons such as **40%** of field service work will be done by contractors in 2020 and **75.4 million millennials** now outnumber **74.9 baby boomers**.

However, changing company culture as a first-line or middle manager may feel like an impossible undertaking. I have personally experienced the frustration in trying to convince organizations that agility is the way to go; rather than feeding my frustration I chose to do what I could in helping create agility within my teams and offer the following five points for managers to create agility within their teams despite a slow-to-change or change-resistant corporate culture.

1

Blur the lines

Over my career, I have seen many tools introduced to help organizations assess, evaluate and plan for talent and people management, from expensive personality and skill assessments to free and inexpensive ways to categorize talent within an organization. These tools, used as intended, can truly be useful for organizations for planning in the HCM space. Unfortunately, I often see the opposite. Organizations using these tools to fit everyone into a nice, neat box. Whether it is the organizational hierarchy, a 9-box talent grid, career and compensation levels or a job description it seems to be in our nature to put people in boxes.

Early in my talent career, I hired a brilliant woman to lead the design and execution of a talent process that truly delivered results. After completing her assessment of the current process and sitting through rigorous 9-box talent assessment conversations, her first recommendation was to change the dialogue with executives. The narrative needed to be: “The humans are not the box.” This phrase sticks with me to this day. Humans are humans not boxes. Humans have feelings, passions, interests, skills, and much more. This set us on a mission to help the organization truly understand through data and technology what skills, interests and experience was available to the organization. Our first step in creating agility is not to see the human as an employee number, career level, job description or a talent box. It is our job as leaders to know what their motivations, interests and strengths are. Dr. Steve Hunt’s 2017 TLNT blog titled “The Case for Junking 9 Box Assessments” lends to the argument that while the 9 box does evaluate employees on a multidimensional level, it tends to cause “confusion and frustration between employee and manager.” Employees struggle to differentiate between the two dimensions measured by the 9-box. To be clear, I am not saying that organizations should abandon all structure of having systems to categorize information (even when that information is about people); rather looking beyond all the boxes in which we put people and understanding the complete profile of the individuals with whom we work.



2

Know your talent

As stated earlier, I worked for a major global retailer. In 2009, our CEO stood on the stage of an annual meeting and stated that he was kept awake at night because he did not believe the company had the talent to fuel the growth of the company. As I sat and listened to that statement, it made me wonder, with over two million employees how could he be making that statement? I quickly realized that the perceived lack of talent was the absence of information on what talent was available and no visibility into the skills and interests of his workforce. This was another factor that took us down the path to bring talent visibility to the organization through technology. Despite having a system of record or a technology to help manage talent, managers should understand the complete profile of the individuals within their team. Once we understand the unique capabilities, we are then able to take the next step in workforce agility.

Increasingly managers are experiencing demands for organizational support, higher productivity and delivery of innovation. Without a strong understanding of individual and team capabilities, managers are helpless against creating an agile workforce. Without robust employee profiles; accompanied by regular intervals of employee / manager contact, managers are victim to assigning requests to employees that are potentially misaligned or demotivating in nature. Having the right information and clearly understanding employee interests and motivation places managers in the driver’s seat to develop an agile and engaged workforce. Traditional motivators such as compensation, productivity efficiency should be re-evaluated with a focus on outcomes and customers. Ask questions like:

- **WHAT MOTIVATES YOU?** Avoid questions such as, where you see yourself in 3-5 years? Most employees cannot articulate this. Rather ask what gets you out of bed in the morning and excited to come to work? Or when you show up at your most gifted what does that look like?
- **WHAT IS YOUR OPTIMAL WORKING ENVIRONMENT?** Teamwork is critical to agility and understanding. What they expect from their leader, manager, and peers is critically important to creating that environment.
- **DESCRIBE THE WORK YOU HAVE BEEN MOST PROUD OF?** Understanding that there are proud moments in every employee’s life will help you understand where they put their full effort and energy into their work. Note: this can be personal i.e. a parenting moment, a community award, civic duty, etc. Don’t be limited by just work accomplishments. Find a way to tie personal achievement back into the work they do or desire.
- **WHAT DOES SUCCESS LOOK LIKE FOR YOU AND WHAT (IF ANYTHING) IS HOLDING YOU BACK FROM THAT SUCCESS?** Understanding an employee’s mental model of success is critical to knowing what motivates them. As stated in the opening, the high-performing millennial employee saw success as experiential not monetary. Every employee is different and at different stages in their career. Success will be different for each individual. Managers and leaders should know how to help facilitate that success.

3

Align the individual and the organization

Once we “know our talent” we can then begin to align the individual to the organization. If I were to have followed traditional 9-box thinking and look at every performance challenge as a moment to move people out of the organization, I would be in a perpetual state of hiring.

EXAMPLE

I inherited an employee that was struggling with her performance for over a year. The performance improvement coaching was not changing the individual's performance in current role. After further looking at her background and experience, I noticed a pattern of roles where she thrived. The roles had a common theme of non-customer facing

and back office strategic support. The option was given to the employee to go on a performance plan and fix all the things she was not skilled in or take a role (same pay and career level) where her skills were more aligned. The employee chose the latter and is still succeeding in her role today.

All of us have talked to colleagues in our networks and heard how understaffed and overworked they are. I will admit that I have fallen victim to commiserating in this space rather than helping my colleagues find viable alternatives to their dilemmas. What if we could flip the conversation with our colleagues and instead of commiserating, collaborate to leverage talent among teams? I worked for a company which offers many opportunities allowing employees to explore other areas of the company on a six month or less agreement.

Additionally, the company offers intelligent software that supports matching coaching mentors with employees based on skill development. This technology, paired with a strong culture of development, has revolutionized how we share skills and talent across the organization. Leveraging your allies, partners and personal networks is a strong way to support an agile workforce.

EXAMPLE

An employee received repeated negative feedback from the sales team and leaders about “Executive Presence.” Understanding that “executive presence” is an ambiguous term, further dialogue revealed that her skill set was not an absence of “executive presence” rather a comfort level

in one-to-many presentations vs. one-to-one or one-to-few. When I aligned her to more intimate venues with executives, the perception completely changed and now this employee is one of the most requested resources in a developing business segment for the company.



Make the sacrifice for development

I am sure that many have experienced People Gridlock, a term I refer to when people are anxious to explore new roles, but the organizational environment is not conducive to moving talent. This environment is characterized by low turnover, flat organizational structure, hiring freezes, flat or decreasing budgets, and spirit of resource scarcity. This environment is like playing chess with all the pieces but the empty squares in the middle of the board are gone. It becomes very difficult to move a piece without an open square. Despite the situation, there are three things managers can do to engage and challenge their teams until the situation changes:

- **LEAN IN** – This is the time to double down on development. Knowing your talent and where you can provide the three E's - Education, Experience and Exposure. Look for opportunities aligned with your employee profiles to support their growth
- **CHANGE IT UP** – Rotate roles and responsibilities in the team. Job swaps and putting people in charge of key initiatives that need to be done can create exciting and engaging opportunities
- **CREATE A COMMUNITY OF SUPPORT** – Providing opportunity to others requires being flexible in setting goals and an understanding that the investment in development will have some consequences:
 - Jealousy or “Why not me?”
 - Resentment “Why do I have to work harder?”

It is important to remember that these will be natural responses to providing development among team members. The key to success in this is:

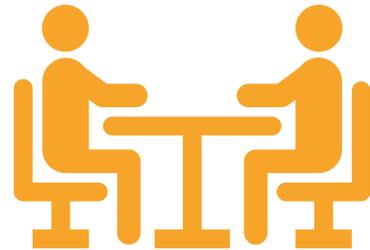
1. **ESTABLISH TEAM AGREEMENTS AND NORMS** – Each person is offered similar opportunities. The key is finding the right opportunity at the right time. Additionally, the leader and the team must be willing to support additional responsibilities for a defined period of time with the caveat that the effort will be reciprocated when other's opportunities present themselves
2. **EACH INDIVIDUAL OWNS THEIR OWN DESTINY** – Employees need to express, through open dialogue, their interest in opportunities and work with their manager to develop the right plan at the right time for themselves and the team

EXAMPLE

I was approached by an employee that expressed concern that she needed greater challenges to keep her motivated in role. As a very senior professional, the mundane routine of day in and day out business case development was not leveraging or utilizing her skills appropriately. Additionally, she needed exposure outside of her narrow geographic focus. Her motivation was leadership; regardless of influence or authority. Collectively we both struggled to find a development fit that provided the criteria above.

While the headcount opportunities were not readily available, the dialogue and persistence to find the right match were the focus. Eventually an opportunity to lead a cross functional senior leadership team presented itself and provided her with the experience and exposure to lead through influence. The positive feedback of the process redesign has been amazing, and she has expanded her network to senior leaders in multiple lines of business.

In order to make this happen, we adjusted focus on the current goals to accommodate not accepting any new accounts and direct focus on the success of the stretch assignment. Additionally, her colleagues agreed to pick up any new requests during the time of the project. This approach supported an agile approach within the team to maintain the primary objectives and support special organizational requests.



Flex the goal plan to the individual

We have seen the evolution in goal setting from fragmented and siloed goal development to aligned and cascaded goals with technology to support cascading and tracking. With the introduction of continuous performance management, this aligned and cascaded approach has now evolved from an annual event to a more agile approach of modifying goals more frequently to support changing business dynamics. If this can happen at the organizational level why should it not apply to the individual? Additionally, why should managers not be able to modify the weighting of aligned goals to allow individuals the time to focus on other organizational and team priorities? For years I have operated under the direction of set 3-5 goals and everyone has the same weighting and focus to complete said objectives. However, I have learned that static goals applied to the masses do not motivate people to success. Understanding their unique abilities and finding the right situations in which to engage those abilities, contributes to higher success.

EXAMPLE

A sales support employee responsible for a five million Euro annual contribution in support of new bookings also had the responsibility of being a workstream leader on a major internal technology initiative that would yield three million Euro in expense savings and tens of million euros in revenue generation. Is it fair to hold this employee to the same standard for the new bookings or to adjust the individual's target and weighting of the new bookings to ensure success of the internal project that will yield a higher return and position the organization for long-term competitive advantage?

One might argue that we should treat all employees the same and hold each employee to the same standard. The same people might argue the internal initiative would be above and beyond and be a "stretch assignment" for a high-potential employee or a differentiator in performance for compensation purposes. While I would agree to some extent that one could manage this way, I would argue that what managers often see as stretch for high potentials can often be perceived by high potentials as demotivating and an intrusion to a successful work-life mix. Managers should have a thoughtful conversation with their employees with considerable thought on how this will be a motivating yet challenging assignment. Employees should evaluate the commitment and how this aligns to their

career objectives and motivation. Additionally, managers should allow the employee the option to decline the development without contrition of disappointing the leader or the company.

Creating balance and challenge within respectable boundaries is a difficult challenge for many managers. Most of us have our go-to people. Often, we overlook others and ask more of our high performers under the guise of opportunity; when in fact, statistics show, in many cases, employees don't value the extra work heaped upon the status of high performance or potential. In a very recent conversation with a direct report who manages a team in my organization, he asked for a 50/50 split of time between a fellowship and the employee's primary responsibilities. After further discussion we both agreed that what we as managers may think is 50/50 is really 70/70. Do we want to deny the employee the 100% immersion experience or do we bite-the-bullet and provide the full experience? I am glad to say the manager selected to provide the full emersion.

Goals are critical to individual and organizational success. Goals should be aligned and cascaded; at the same time, managers have the responsibility to engage in regular dialogue with their employees and consistently update each other on goal progress and organizational changes in priority. Managers should promote team agility by:

- adjusting goals regularly;
- adjusting weightings based on organizational needs and team projects;
- removing or retiring goals that lack relevance based on changing organizational priorities; and
- understanding that while the goals need to be achieved, how individuals contribute to that goal can be quite different in getting the maximum engagements.



CONCLUSION

While many organizations are considering what agility means to them and are acutely aware of the benefits and need for workforce agility, many are finding the cultural shift to be extremely difficult in the areas of leadership, business operations, financials, etc. Managers can and should take the first steps in moving toward a more agile workforce. The more success stories that model

workforce agility an organization can curate at a first-line or mid-manager level, the easier the cultural change becomes. One does not need to wait for a board or executive mandate to execute the five practices above. They only need to have the initiative to blur the lines, know their talent, align the skills, adjust individual goals and make the sacrifice for development.



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