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co-creation

TROUBLEMAKERS!
INFLUENCING A CULTURE THAT DRIVES SUCCESS

A Collection of Insights from
SURGE Co-Creation

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INTRODUCTION

The following pages house the results of an industry-wide virtual collaboration.

SURGE Co-Creation assembled association professionals from across the globe to harness collective knowledge, through a virtual conference focused on transformative ideas and designed to maximize social learning.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own thoughts. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook, one of the eleven-part SURGE series, delves into the session, *Troublemakers! Influencing a Culture that Drives Success*. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the **SURGE** Co-Creation event page to watch all the sessions for free, at your leisure!

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FEATURED SPEAKERS

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Allen Lloyd, CAE

Executive Director, Montana Society of CPAs

Allen Lloyd didn't always love the accounting profession. It took six years working as a firm administrator to develop a passion for helping people trust and understand financial information. After another six years helping CPAs across Ohio at the Ohio Society of CPAs, Allen made his way west to become the Executive Director of the Montana Society of CPAs. In this role he manages the MSCPA staff and day to day operations to move forward THEIR mission to inspire, empower and impact members to achieve professional excellence.

A strong habit of lifelong learning allowed Allen to jump in and find solutions to new problems. He is able to present both practical topics to help get more done with less and complex ideas in a way that is easy to understand.

Allen grew up in a small town on the Ohio river where he rode his bike all summer, something he is happy to do again in Helena. He is married to a CPA and has two boys and dog who all like to be outside on the trails.

Aldo Maragoni

Communications manager, CalCPA

I love words and I use them wisely. And I especially love to use them to develop relationships with audiences—whether external or internal—and enhance engagement. Clear, concise and consistent communication helps explain why an organization does what it does; how it helps its members or customers; tells the stories of why people work at the jobs they do; and paints a picture of how each department fits together to form the whole and works together to advance the organization. How we communicate and the tools we use seem to constantly change, which is why I approach communications with the same mindset I do playing hockey: Head up. I survey the ice and plot each stride, yet can shift on the fly to meet changing needs and tech advancements to avoid being checked into the boards.

Jamie Notter

Co-founder and Culture Expert,
Human Workplaces

Jamie is an author and culture expert at Human Workplaces, where he helps leaders drive growth and engagement by aligning workplace culture with success. With 25 years of experience in conflict resolution, generational differences, and culture change, Jamie is also the author of three books—Humanize, When Millennials Take Over, and The Non-Obvious Guide to Employee Engagement—and holds a Master's in conflict resolution from George Mason and a certificate in Organization Development from Georgetown, where he also serves as adjunct faculty.

Meena Dayak

VP, Integrated Media & Communications
American Public Power Association

Meena is an advocate of change because it moves missions. She has been on the executive team in trade associations since 2005 and spearheaded strategic planning and partnerships, media and communications, marketing, public education, conferences, and member services. She is solutions-focused and an evangelist of great ideas. At the American Public Power Association,she has helped members across the country raise public awareness of their contributions as community-owned energy providers. She supports strategic planning for the association and is an advocate of data-informed decision making. Meena is intensely creative and enjoys unleashing that gift in others. She has convened Associations Catalyzing Entrepreneurship, an evolving cross-functional group of association leaders and stakeholders who think outside the association box about survival and success. Through ACE, she is collaborating to develop a creative, nimble, bottom-line focused approach to association futures.

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GUEST SPEAKERS

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David E Elliott, MSc, BSc

Human Centred Design and
Learning Facilitator

David loves to challenge the status quo and push boundaries. As an educator and facilitator he helps groups, help themselves. Using participatory methods, from several disciplines, David helps groups to reflect, share, co-create, innovate and experiment to seize opportunities and create more positive realities. Over the last 20 years he has worked and volunteered in Canada,Kenya, Tanzania, Cameroon, Italy and Vietnam, collaborating with organizations like Rotary, the United Nations, United Way, ORBIS, the Canadian higher education sector, CKX (Community Knowledge Exchange) and the Government of Canada.

Rhea Blanken

Founder & CEO, Results Technology/Blanken Consulting

For over 30 years, Rhea has promoted experiential learning, expeditionary thinking, and the partnership of volunteer and staff leaders within the association community. Her work affects an organization's productivity, image, impact and influence. Past-based issues disappear; productivity expands; and unexpected and desirable futures appear. Her book, Embracing the Future, a future-focused workbook is full of easy-to-use exercises and activities, supporting organizations, Boards and staff to walk their talk in creative, innovative ways.

She is masterful in facilitating experiential group processes and eliciting enthusiastic and effective participation. Ms. Blanken is especially successful in creating and accomplishing future-focused Strategic Scenarios. Through her expeditionary approach, the stakeholders become raving champions for the enterprise and its new created future. Rhea works with her clients to imagine, address and confront their un-conceived futures before they become ill conceived. Her profoundly candid and engaging demeanor, complemented by an insightful story-telling presentation style produces memorable experiences where participants are propelled into action.

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HOW ARE YOU CHANGED BY CULTURE?

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By Allen Lloyd

"But we always did it that way!"

If you are like me, that phrase is like fingernails on a chalkboard. How an organization embraces change and evolution has a huge impact on culture. At my last association, the culture had a great balance between tradition and change. I was solidly on the change side for the first four or five years, pushing people on why they did things the same way when there WERE other options.

Flashforward to years five and six, we had some turnover, and then there were new people who played the same role as I had; fighting processes, coming up with new ideas, and pushing for change. At this point, I found myself defending the status quo—**I had become that which I fought for years!** The worst part was others noticed as well; co-workers started joking that I had finally stopped fighting to change everything.

This experience got me thinking about how people and cultures impact each other. Culture is a construct created by humans, but **as much as we create cultures, they also make us who we are**. As an executive director, I know it is critical for people to fit into the culture, but at the same time, it is important for the culture to positively impact the people as well. It is important to make sure that everybody within an organization feels fulfilled. This doesn't mean that everybody is happy or that every day is easy. To feel fulfilled is to feel successful as a person, and I think the organizations with the strongest cultures find a way to **align individual fulfillment with organizational success**.

No person or culture is perfect, and neither is finding ways for a group of people to feel fulfilled. Years ago, I heard something that stuck with me:

"We win, I fail."

As leaders, we need to recognize that no success comes from us alone; it takes people to contribute and make it happen. However, when something goes wrong, at the end of the day, it is my responsibility. Working this into a culture gives people the space to learn and grow as human beings, and hopefully find fulfillment along the way.

FROM **THE CHAT**

"You can accomplish anything if you don't care who gets the credit for the idea."

- Robert Rich -

"Management often pushes an 'ideal' culture; if you don't start by explaining WHY it's ideal, it will feel forced."

- Jamie Notter -

"We have been working on the culture change in our office and it really is important that it happens from the top down."

- Jennifer Moulton -

"There are lots of ways to embrace remote team members... 1. Offsite meetings where the offsite members are flown in 2. Make all meetings video calls and make SOME meetings ONLY video calls, even if people are in the office together. 3. Utilize web-based culture platforms to help with recognition and staff engagement."

- Dave Will -

04

CULTURE CLUB

By Aldo Maragoni

It might be defined; it might not. Either case, it's still there—your company's culture. More than foosball tables, vending machines and flex schedules, organizational culture hits to the personality of a company. It defines the environment in which employees work, including—but going beyond—company mission, values, ethics, expectations and goals.

When talking about corporate culture, it likely won't take long before the oft-asked question arises: **Who's responsible** for setting—or in some cases, changing—the culture? Some say it's top-down; others think it's bottom-up. In the end, **it's both those extremes and everyone in between.** There are ways individuals—regardless of position, title or role—*can* positively influence a company's culture. And not only can, but I would go so far as to say *should* influence a company's culture, because in the end, either you define your culture or your culture defines you.

This all sounds easy, I know. And I also know when it comes to influencing company culture and process, there's often resistance (read: "But that's how we've always done it"). Still, by following some simple steps, you can soon find yourself being an influencer.

BIRD'S-EYE VIEW

If you're going to influence your company's culture, you need to **understand what it is currently**, where the company is going and get a sense of how various people and departments work together—or areas where they need to work together.

WHERE ARE YOU?

It might be tempting to start big and make a splash—or attempt to. But before jumping into the deep end, swim in your own area/department and set the culture tone there, because that's where you'll likely have the most **initial influence**. From there, you can establish advocates and allies and work outward to the rest of the organization.

MAKE THE CONNECTION

There's a lot going on each day and it's easy to keep your head down and plug away at the to-do list. Don't. Take the time to learn about the people and other departments

elsewhere in the organization, which can lead to conversations about how your respective department can work together, sharing ideas about your organization's culture and taking steps toward improving the whole organization.

FIGHT THE RIGHT BATTLES

We all DO things our way, but when it comes to influencing organizational culture, there's a bit of servant leadership that needs to happen: we need to step back and think not from the perspective of what's best for ourselves or what we would like best, but what's best **for the organization**. Selfish or disingenuous motives can be spotted fairly quickly and won't go far in establishing allies or credibility.

STEP OUT OF YOUR COMFORT ZONE

By nature, I play by the rules, so this lesson is always a challenge for me. But if you're going to be tackling something like corporate culture, then by definition you'll be changing things and there may be an element of the unknown or not having all the answers.

SMALL VICTORIES

Culture change can seem like an endless mountain climb or a task too large to succeed. And it might seem like a, "Are we there yet?" feeling. Which is why it's important to set and celebrate small wins, whether it's something like the CEO meeting with staff over bagels once a week or, as we do at our organization, a monthly newsletter from IT, or whatever it is you set for your company. **These small wins indicate progress**, build momentum and show the seriousness of the initiative—as well as alleviate some concerns people might have that this undertaking will dramatically change their jobs or the way they do things.

PATIENCE

If you're trying to influence your culture, you likely want to see results immediately. We're just that way and it can be easy to get discouraged. But **culture change is a long game** and it takes time to influence processes and change people's thinking and actions.

FROM **THE CHAT**

"I'm interested in figuring out how measured I need to be with culture changes in order to be adopted. Too soon, and it's overwhelming. Too little, and you end up reinforcing the culture."

- Melissa Patterson -

"Figure out a way to introduce change "with the current". Make the starting point a place that they can relate to."

- Pamela Cowan -

"Attitude is to people what culture is to organizations."

- Holly Wells -

MAKING SENSE OF YOUR CULTURE

By Jamie Notter

Culture change, innovation, and experimentation are all hot topics. But before you go about making changes, you need to have a good grasp on **what your culture truly is, not simply what you think it is.** As a culture consultant, I encounter a lot of confusion around this topic.

What is culture anyway? In a previous article, I've defined it to be the collection of words, thoughts, actions and—sorry for the technical term—"stuff" (i.e. the tangible and the non-human components of culture), all of which clarifies and reinforces what is truly valued inside an organization. Remember, what is valued will drive behavior, and that's why culture is so important. Now that we have that cleared up, there are a few things you need to keep in mind before you disrupt the current way of life of both the staff and the members in your association.

ACTIONS SPEAK LOUDER THAN WORDS

We all know the expression. The words you use to define your culture needs to align with the behaviors inside it. I don't care how much you tell me that your culture is one way when I see people behaving another way. **If behavior and words are inconsistent, then behavior wins.**

YOUR CORE VALUES AND WHAT IS VALUED CAN BE DIFFERENT

Core values are lovely, but they rarely drive behavior. To get to the bottom of what is really valued in your organization, you need to look at **what is driving behavior** and how people make choices. To be an influencer in culture change, you need to **see the culture patterns underneath the system**.

INNOVATION IS NOT ALWAYS NEEDED

These days, I get called in to talk about innovation. "We need to innovate," I keep hearing. That might be true—but not if you're a nuclear power plant! In that context, I definitely do not want you hacking things. I don't want you doing experiments before perhaps going

through university-based peer-reviewed research first. Therefore, our approach to agility or innovation should be based on the organization. It has to make sense. You need to see the reality of your organization's culture situation. **You should always be choosing your culture based on what makes you successful.**

THE CHANGES YOU WANT TO MAKE NEED TO MAKE SENSE

A lot of times when trying to influence culture change, we end up getting resistance we classify as resistance to change. But is that really the case? Sometimes, it's actually **resistance to doing things that don't make sense**. You need to get on the same page about the current state of your culture before pointing at a direction you want it to go. You have to connect your ideas back to the current reality. **If we all spend more time helping people make sense of what's happening right now, it will make it a lot easier to move towards a future desired state.**

FROM **THE CHAT**

"Management bought software to aid staff in collaboration and culture-building. But then management did not participate in the software. Management was the problem."

- Susan K. Rogers -

"No one dies wishing they spent more time at the office."

- Cecilia Sepp -

"Good cultures are aligned with the intended strategy."

- Robert Rich -

CULTURE CHANGE: IT TAKES POSITIVE TO ACHIEVE POSITIVE

ASSOCIATION
SUCCESS.ORG

By Meena Dayak

I suppose I've always been a catalyst for change, but it took me a long time to realize that it places me in the ranks of the minority. Everyone wants to grow and excel and I'm just helping. Right?

However, **the reality is that most people don't want to change**, especially in a setting and culture where they're comfortable. They want to maintain the status quo and do well, but not better. "If it ain't broke, why fix it?" is the norm. On the flip side, if they don't like it, it's easier to look for another job than it is to change things where they are.

When you are the disruptor who sees the potential for more, you're dragging people out of their comfort zones. And of course, they're going to kick and scream, and dig in their heels.

Understanding that not everyone has the same burning desire to make things better is what caused a paradigm shift in my journey as an influencer. When I accepted that my colleagues are in different places and I need to meet them where they are, I started to get better results.

Here are five important lessons I've learned about how to positively influence company culture without being a jerk:

01 Get the timing right

When you're a newbie, you have a certain cache and a window to introduce new ideas — with a little bit of license to blunder. But being too disruptive too soon could make you obnoxious. The "bull in the china shop" attitude means you won't get buy-in for long-term results. **Be careful not to discount the insights and experience of those who've been there and done that**. Give yourself time to understand the environment too.

But don't wait too long either. If you set only a conciliatory tone, it's harder to transition into a change agent. Plus, you don't want to fall into a rut of complacency yourself.

02   Make it concrete

You may have grand ideas, and lofty goals.

"We need to break down the silos." "We need a culture of collaboration." "We have to focus on results." "We need a strategic plan."

YOU may see how to get there, but are others supposed to read your mind?
Break that pie in the sky vision down into something more concrete. **Define the step-by-step process** by which two departments can work together. Show some real numbers — measure the impact and share the findings, in context. If you want to point out inefficiencies — translate them into costs versus revenues or insights from the timesheets.

Meet people where they are. There is no formula for how to connect. Sure, face-to-face meetings are great for sharing new ideas. But if some people find meetings overwhelming, then share a written plan.

03   Take a little less credit, a little more blame

This is where I turn to inspirational quotes. Late Indian prime minister Indira Gandhi said, "There are two kinds of people, those who do the work and those who take the credit. Try to be in the first group, there is less competition there."

If you're a disruptor, people are probably tired of listening to your next great idea. So plant a seed in someone else's head. If they believe it's their idea, they're going to own it and make it work.

Be helpful and support the action from behind the scenes. Roll up your sleeves and dive in. Those who resist change usually resist it because they don't want the extra work. If there's a way you can take that on, it might break down the resistance.

And if things don't go as expected, find a way to jump in and say "Oops, I didn't think of that. But how about we try this instead…"

You may not get the employee of the month award but you'll get results.

04 Work your allies

Chances are you'll find a few allies directly connected to the workplace. They could be a team member, a peer, a staffer whose work doesn't even naturally intersect with yours, or a member. If you're genuine and a good listener, you'll find these allies. **Work with them** to vet and roll out your ideas — get their buy-in up front.

In addition, be open to the fact that your allies could come from the outside. Remember that Mark Twain-ism about an expert being an ordinary fellow from another town? This is especially true in the association community. Whenever you can say, "We wouldn't be the first to take this leap. I heard about another association that did X or Y," it can assuage the fears of the risk-averse.

Bring in these outside influencers — vendors, consultants, experts, and association peers are all fair game. Whether you read a great article that really resonated or heard someone else speak your mind, invite them to come and present to your colleagues, to spark a dialogue. Or perhaps even, watch a TED Talk together over a brown bag (bonus points if you can find the budget to order pizza).

05 Show what's possible

You can't change the culture if all you do is talk at people. You need to show and tell. Within your sphere of influence, there are always things you can do, without permission. I love Jamie Notter's mantra, "Proceed until apprehended!"

Does every tech decision have to be approved by a committee? Perhaps there's some scrappy, low-cost technology that's within your budget — just get it, use it, and demonstrate the efficiencies.

Before you make it an annual project or a permanent change, **pilot it**. It's far less threatening, and far more encouraging when you can share some clear wins.

At the end of the day, if you want to introduce positive culture change, **you have to stay positive**. And patient. And persistent. But it's truly rewarding when you can move the needle.

CULTURE AND PROCESS IN DESIGN THINKING

By David Elliott

In my work as an educator and facilitator, I like to use techniques from human-centered design, and design thinking in particular. When I introduce design thinking to people, they are really eager to experience all the benefits, especially the teamwork, the very precise problem identification, and of course the often unique and really effective solutions to problems that the process generates.

However, there is something to be cautious about.

DESIGN THINKING IS A TWO-SIDED COIN

The process is on one side and the other is the culture in which the process operates. The culture side is very important, sometimes even **more important than the process**. You can't separate process from culture to get the results you really want.

There are four key cultural elements:

01 Optimism—to be able to imagine a more effective future than the current state.

02 Courage—to color outside the lines and experiment.

03 Equality—the ability to work together as equals, leaving behind hierarchy.

04 Collaboration—the ability to work effectively together and co-create

Those four elements are the oil that makes a machine work. They're the magic in the process. If you're interested in design thinking, I encourage you to experiment with it and to explore it. Keep in mind, however, that **the cultural elements need to be attended to and be consciously created and facilitated** to get the full results of the process.

DISTINGUISHING POINTS OF VIEW

By Rhea Blanken

Distinguishing point of views (POVs) can help better frame one's value and appreciate the contribution of others.

Consider this: Our POV is the world we live in. it's neither right or wrong, good or bad! However, our POV has us often more committed to being right about something in order to look good, be comfortable, and/or remain safe within specific situations and circumstances.

But what if **we could all benefit** from experiencing new ways of seeing our POV and that of others without having conflict or competition over trying to convince another before the best communication occurs? This is not about changing anyone's mind on a topic. It's more about **better human connectivity through a deeper appreciation** of the rich and textured diversity included in all POVs.

YES, PEOPLE THINK DIFFERENTLY ON MOST THINGS

Edward De Bono wrote 6 *Thinking Hats* outlining six ways people think to address this situation. He showed how it's possible to think together to better include and appreciate everyone's POV. Using his methodology, individuals can express their thoughts under the protection of one or more of the thinking hats. Whether to solve a problem, create a new process or service, do performance reviews, or build strategic scenarios—De Bono's *Six Thinking Hats* is a simple communication tool. I've used it often with great success for over 25 years.

Here is a summary of the Hats and their POV:

■ WHITE—Provable Facts & Figures
What information and resources do we need to address this situation properly? Facts are needed, not beliefs. Look for gaps in knowledge and either try to fill them or be able to account for them. Be careful not to add any interpretation.

■ RED—Hunches & Intuitions
How do people feel about this? Let's explore it as it seems to matter to you or others with no justification needed. Emotions are in the background of human response— providing a safe-space for them makes good sense, especially when making decisions.

■ **YELLOW—Future with Optimism**
Why is this a valuable idea? Why do we think "IT" could happen? If "IT" happens—then what? Express the feasibility of actions being discussed. It's constructive thinking for making things happen.

■ **BLACK—Critical Judgement**
What are the lessons learned from past experiences and/or the "risks" for having this not succeed? Spot fatal flaws and risks before one embarks on a course of action, and prepare contingency plans. May seem pessimistic—devil's advocate in tone and attitude—but it's really their "risk assessment".

■ **GREEN—Creativity & Imagination**
What else is possible? What might be an alternative? Might there be another explanation? May sound provocative at first blush. Deliberately offers new ideas, often in a non-linear way.

■ **BLUE—Organizes & Manages the Process**
What have we achieved in this discussion and what's next? Summarize the next steps and frame future focus. If *thinking* is a dance, then Blue Hat is the choreographer. It frames the discussion's focus, the time to spend on each hat's analysis, and comments on the thinking being used.

The willingness to shift your POV while appreciating another's endorses the quote by futurist Daniel Burrus: "Your view of the future shapes your actions today, and your actions today shape your future."

If you want to go the extra mile on POV exploration, consider using the ideas expressed in James Gilmore's book, *Look*, inspired by his appreciation of the *Six Hats* model to shift one's perception and shift our POVs. He says "what we see determines the actions we are OR are NOT willing to take plus how meanings get added to everything."

His six glasses are:

01 **Binoculars—Surveying & Scanning:** What, if anything, have we missed?

02 **Bifocals—Comparing & Contrasting:** What is an opposing POV? What is each step, from end to beginning?

03 **Magnifying Glasses—Pausing & Pinpointing:** What do you want to know but haven't? What may be the most critical or compelling?

04 **Microscopes—Scrutinizing & Studying:** What else to look at, nearby, for more details and possible effects?

05 **Rose Colored Glasses—Enhancing & Enriching:** What could have/make XYZ better? What are the hidden opportunities?

06 **Blindfolds—Looking at Looking:** Look back at the end of event and/or after completing a task to see what stands out.

Maybe Yogi Berra, legendary baseball player, was spot on after all when he said: "You can observe a lot just by watching". Learning to observe your POV and appreciating others is a worthwhile life-long practice.

FURTHER RESOURCES

ASSOCIATION SUCCESS.org

During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about positively influencing culture. We've compiled them into a list here.

- Video: TED Talk on moral behavior by Frans de Waal

- Book: Transforming Business With Godly Governance: Nine Characteristics for Workplace Success by Agnes Amos-Coleman

- Article: Fun musing for the future workplace.

- Book: Leading from Your Best Self: Develop Executive Poise, Presence, and Influence to Maximize Your Potential by Rob Salafia

- Book: Beyond Measure: The Big Impact of Small Changes by Margaret Heffernan

- Tool: Culture And Employee Experience Platform

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