

<b>Entrant:</b> Marianne Gobeil, APR	<b>Division 1:</b> Communication Management <b>Category 1:</b> Internal Communication
<b>Organization:</b> Leading Communicators Inc.	<b>Time period:</b> September – December 2017
<b>Entry Title:</b> RBC ONE Leadership Forum	<b>Entrant's Role:</b> Project Lead, responsible for the design, development & delivery
<b>Team member's name:</b> Anne Marie Turnbull	
<b>Project Description:</b> The research, development and delivery of a seminal leadership forum for 156 senior leaders of Canada's largest financial institution, focused exclusively on meeting the current interests and concerns of these leaders and their teams during a time of the greatest level of change in the bank's history, and on creating an opportunity for them to learn from each other by sharing insights and ideas. A radical departure from the sales focus in previous years' events, this Leadership Forum was deliberately designed to <u>engage</u> them, <u>elevate</u> their confidence and capability at thriving amidst change, and enable them to <u>engineer</u> their success through all the change to come.	

## 1. BUSINESS NEEDS/OPPORTUNITY:

**Business Need:** 2017 marked the year of greatest change in RBC's history. Canada's largest bank is immersed in a sweeping business transformation, stemming largely from the digitization of its services across the country. The magnitude of change in 2017 was having an impact on its staff, especially in retail banking, and their clients.

RBC's Ontario North and East (ONE) Region is located in Canada's most populous province, spanning over 200 cities and towns from Cornwall to Ottawa to Ajax to Kawartha Lakes and as far north as North Bay, Kirkland Lake, and everything else in between. The ONE Region had implemented change more quickly than most other regions. Although its financial results were very good, its 2000 employees were feeling the brunt, reflected in the Bank's second lowest engagement scores in the country and elevated Leave of Absence rates. Branch closings and consolidations had also had an impact, particularly in rural areas. While some individual RBC leaders and teams in the ONE region appeared to be managing the changes effectively, many others were not. Knowing there would continue to be a significant level of change throughout 2018 and beyond, the Regional President was concerned about both the current and future impact on her employees and the ability to sustain financial results.

**Communication Opportunity:** Having worked with her seven years earlier to strengthen her leadership communications capability, she reached out to me. Initially, her request was for me to deliver a 2-hour leadership communications workshop to her 156 leaders so that they could be privy to the learning that enable them to communicate more effectively as leaders. She also thought a session on time management would enable their leaders to manage better, and a session on mindful meditation would help them and their teams manage the stress better.

It was quickly apparent from the research we gathered and reviewed that these combined measures were not enough to improve staff morale, and build the confidence and capability that would prepare ONE's leaders for another challenging year of change ahead. However, upon further conversation and after reviewing the materials that they provided, it was clear to me that something new and different was needed to create positive change in staff morale, support the development and competence of team leaders faced with constant change, and better position RBC ONE to sustain impressive business growth through the change to come.

In past years, the ONE Leadership Forum had been primarily focused on business results and sales strategies; in fact, it had been called a "sales leader conference." But why not reimagine the event as a leadership forum so it could both acknowledge and respond to the staff's pressing current challenges, and build their resiliency for the future? I saw the 2017 forum as an opportunity to address the specific interests and currents pressing on the managerial leaders right now. It had to be all about them. They needed to feel recognized and supported. Rather than make assumptions about them or presume what they need, we needed to ask them; and listen.

I recommended that a communication be sent from the Regional President to all 156 leaders inviting them to the leadership forum; that it be warm and personal, and convey right away that this would be different from other events. I wrote the invitation with wording that promised, "Together we will identify what we can do to strengthen our resilience, thrive amidst change, and create a future filled with even greater opportunity."

Within a week of receiving the invitation, a second communication was crafted to serve as immediate proof in their ability to trust in this promise. Each team member received an email from the Regional President personally requesting that they each share "the one thing" that matters most to them. Within a few days, 96 individual submissions were received (see the Work

Sample), a 64% response rate. Key themes and concerns emerged from this research, including: how to support team members and keep them highly engaged throughout constant change; how to boost low team morale arising from added stress and clients who take out their frustrations on front-line staff; as a coach and mentor, how to ensure I have the time and capability to consistently bring out the best in my people; and how to foster ongoing leadership growth potential of key team members, with stretched resources and non-stop change.

We now had the pivotal front-line input we needed to design a leadership forum that would be distinct from all those in the past. We recommended that the ONE Leadership Forum be entirely focused on the region’s 156 leaders – their interests, concerns, insights and ideas – and that it directly reflect RBC’s new Leadership Model, particularly its aim to “Unlock the Potential of Our People.” The forum would be a celebration and recognition of the past year, and inspire a shared vision of the future. And it would be encapsulated by one central theme, drawn from RBC’s new Leadership Model: Engage. Elevate. Engineer.

## 2. STAKEHOLDER ANALYSIS:

### Primary: Mid-to-Senior-level Managerial Leaders

This largest stakeholder group is comprised of 156 Director-level leaders, Senior Managers, Branch Managers (who made up half the group), Community Managers, Vice Presidents and Regional Vice Presidents; combined, they manage and lead approximately 2000 people across the ONE Region. They work in a wide range of environments (small cities, small to mid towns, and rural) with a wide range of clients in retail and commercial banking, and are responsible for communicating the bank’s key goals and strategies to their teams. The ONE Leadership Forum is their only opportunity of the year to gather and share ideas and perspectives face-to-face. Much of their communication is directed to two to three stakeholder groups, i.e., employees, clients and suppliers. Most are keen at this stage of their career to continue learning; the most senior of them have received media training. From my conversations with the client, and information I requested -- the key results from ONE region’s latest Engagement Survey and other RBC leadership principles and practices (e.g., the ONE Pledge; the Speak Up phone line; the new RBC Leadership Model, and North Star vision) -- I confirmed that a great many, particularly mid-level managers in retail banking, were feeling the negative impact of change on both themselves and their employees.

### Secondary: Executive Leaders

Within the RBC organization, this includes Regional Presidents like the senior leader in this engagement. Her buy-in and support was crucial to the design, development and execution of the program. She was involved and engaged at every stage. My past informal research and professional consulting experience confirms that executive leaders are typically high-performing individuals who are intelligent, determined, confident, hardworking and disciplined. Like her peers, the Regional President has huge responsibilities, and little time to spare. She is responsible for articulating the vision, mission and direction of the ONE Region, and readily realized how critical this is during a time of such tumultuous change. She was committed to optimal communication with her team, and trained and capable to do so.

## 3. GOALS AND OBJECTIVES

The overall goal was to design and deliver a gold-standard RBC ONE Leadership Forum that reflected the specific interests and concerns of its participants, would actively engage them, significantly increase their leadership communication capability, build peer relationships, and strengthen their resiliency to change. We set two key objectives:

AUDIENCE	OBJECTIVE	MEET
Mid-to-Senior-level Managerial Leaders	Build confidence and capability in leadership and communication skills so they create positive and supportive interactions every time they interact – as shown by at least a 75% agreement rating in a post-event evaluation	75%
Executive Leader (Regional President)	Use and model the proven LeaderSpeak® method throughout the forum so that at least 75% of participants perceive her as an authentic, responsive, credible, inspirational leader, based on post-event evaluation	75%

## 4. SOLUTION OVERVIEW:

**Tactical Execution Plan:** To achieve our goal of designing and delivering a gold-standard Leadership Forum for RBC ONE that spoke directly to participants’ interests and concerns, we set out to research and identify the things that were currently concerning these leaders. To engage them from the outset, we had the Regional President send each participant a personal

email message, inviting them to share “the one thing” that matters most to them. Response was rapid, honest and fulsome, with a 64% response rate achieved within several days. Next, we analyzed the 96 responses, then proposed a 1.25-day leadership forum that would begin the evening before – a first for RBC ONE – deliberately designed to begin by celebrating their success. The full-day program that followed would focus on shaping the future by engaging them, elevating their confidence and leadership capability, and enable them to engineer success in 2018 through say-do alignment.

Armed with our research, we established guiding principles for the forum’s design. We wanted participants to be inspired by their most senior leader, the Regional President. We wanted them to feel that they had been heard. We needed them to believe that they are valued and recognized. We wanted them to learn and apply leadership communication best practices to engage their teams and engineer success in 2018. We aspired to enhance their coaching competencies so they could elevate their teams. And we wanted to develop their peer relationships to strengthen ONE’s leadership community.

To achieve these goals, the forum featured a variety of distinct elements and delivery techniques (see the Work Sample). The evening celebration included an informal storytelling segment that invited participants to step up and share their tales of 2017 successes. This effortlessly filled 90 minutes, and could have gone on longer. In every case, the leader proudly recognized his or her team members by name, setting a very positive tone for the following day’s event.

Rounding out the full-day forum were two specialized workshops designed to engage participants and build their professional competence. The two-part LeaderSpeak® session taught participants the essence of how to communicate as a leader, and gave them an opportunity to practice and integrate these skills into their actual leadership communication. The Power of Mindful Meditation workshop introduced this technique as a best practice and asked participants to try it by doing a 5-10 minute meditation. An additional highly impactful segment of the full-day forum was the “President Unplugged” session that opened the afternoon. In this moderated session, the President expressed her vision for 2018 (and beyond) – which I helped her craft -- then invited participants to ask any question of importance to them, either at a microphone or anonymously by completing a card. This aligned perfectly with RBC’s ONE’s existing “Speak Up” initiative and cemented the perception of the President’s credible commitment to the practice of listening and responding to employee concerns. Group activities were also an important component of the forum. In an exercise designed for sharing best practices, participants were asked to highlight the most meaningful example in the past 18 months of what they (or someone in their personal or professional circle) did to “unleash the potential of their people.” Participants were then asked to describe how they would further improve on that in the coming year, and what type of senior management support would be needed. The executive team of Vice Presidents sat on chairs on the stage, facing the room, listening and making a verbal commitment to respond/review – a powerful visual symbol of commitment to action, caring for their concerns, and overall solidarity with the ONE team.

**Action Plan**

**Audience:** Mid-to-Senior-level managerial leaders, Executive Leader

**Key Messages:** The messaging delivered in each of the Regional President’s four communications consistently reflected these three key messages:

1. **2017 was the greatest time of change in the history of RBC ONE, and it was your resilience to all the change that enabled us to do so well.**
2. **I believe in you, and am fully committed to supporting you through this journey (of change).**
3. **Change is the new normal. It is our friend. It will make us stronger. Embrace it.**

**Communication Tactics:**

**Timing**

<b>Qualitative research:</b> conference calls with ONE Regional Pres. and her several of her senior direct reports on current & near-term business conditions & challenges; review of ONE Region data – latest Engagement Survey, leadership model, RBC’s North Star vision, past forum materials	<b>Sept. 13- Oct. 12/17</b>
<b>Primary research:</b> pre-event e-survey of Leadership Forum invitees: request for them to share “the one thing” that matters most	<b>Oct. 16-23, 2017</b>
<b>Development &amp; design of Leadership Forum,</b> w/ input from e-survey, additional discussions with a small committee of Regional President’s direct reports, and approval from Regional President.	<b>Oct. 23/17 – Nov. 10/17</b>
<b>Counsel &amp; collaborate with Reg. Pres. and craft the key messaging and other key elements of her four communications</b>	<b>Nov. 20-28, 2017</b>
<b>Develop presentations for the three specialized workshops (LeaderSpeak I &amp; II, Mindful Meditation)</b>	<b>Nov. 20-27, 2017</b>
<b>Personally deliver two workshops on leadership communication, and facilitate the fireside chat (Tina Unplugged Session). Manage and help facilitate the other sessions.</b>	<b>Nov. 28-29/17</b>
<b>Post-forum email – evaluation survey of attendees, and analysis</b>	<b>Dec. 1/17</b>

## 5. IMPLEMENTATION AND CHALLENGES:

We realized quickly that to achieve its goals, this ONE Leadership Forum had to be different from all others. With tight timelines until the event, every extra step would take precious time. But our research and experience told us we needed to fully engage participants from the outset – and a personal email and appeal from the president would achieve that. It was a gamble that paid off handsomely, because the clarity that came from that exercise changed everything. We now knew we had to start the program the evening before the forum to begin to build and strengthen relationships within the community and celebrate their success in a very tough year.

Previous (sales) events for the leaders had never included an evening portion so the client had to add budget for it; we were not involved in this part of the program at all, her staff managed all of the logistics and costs related to the venue, food and beverage throughout the leadership forum. Our role and responsibilities, however, expanded greatly in scope over the course of the engagement from the initial request for a communications workshop and mindful meditation session. For this, plus my counsel, development and coaching on the Regional President’s communication, I initially quoted \$16,000.00. However, once I realized the need for a more robust leadership forum, our roles and responsibilities grew to also include the strategy, design, development, project management and delivery of the entire 1.25-day Leadership Forum, as well as all of the written materials (e.g., Program) and PowerPoint presentations. I ensured the client recognized and approved the expanded scope of service and related fee. In the end, the budget doubled; the client appreciated the added value and was extremely happy with the results.

The “open mic” Unplugged session with the Regional President was a risk, not knowing the breadth or tenor of questions she would be asked. But because she had taken my leadership communications program years ago, she felt confident and immediately embraced the idea. We thoroughly prepared her for her Unplugged session. She was highly effective, sounding open, honest and authentic, resulting in one of the most highly rated of all sessions based on attendee feedback.

A key challenge was fitting in all the vital elements of the program and still ending the forum on time, which was imperative. Several sessions where senior managers asked questions or contributed their ideas ran overtime. We decided this was very valuable input and let it run, within limits, adjusting times on several afternoon sessions. This particularly affected the practice time in the second portion of the communications workshop (Alignment), as I had to cut it short to end on time.

## 6. MEASUREMENT AND EVALUATION

Based on the results of an in-depth post-event evaluation survey (see Work Sample) and glowing praise from RBC ONE’s Regional President, the 2017 RBC ONE Leadership Forum set a new bar for excellence when compared with previous forums. More than 57% of respondents rated the Forum as Excellent; another 37% rated it Very Good. Some 98% of respondents said they had learned something new that they would apply to their role, and of those, 52% had already used the new communications technique. Verbatim comments included the following:

- “There is not enough space to write in this box everything I learned.... So many important takeaways, and will say this is probably one of the most impactful meetings I have attended.”
- “I will use the effective communication techniques in all of my communications going forward.”
- “The LeaderSpeak session was fantastic! I thoroughly enjoyed the learning and have started to use the templates...”
- “More time hearing from (Regional Pres.). I always love listening to her and what’s on her mind. She is an excellent communicator and is very inspirational. She simplifies things that are complicated.”

AUDIENCE	OBJECTIVE	MEET	RESULT
Mid-to-Senior-level Managerial Leaders	Build confidence and capability in leadership and communication skills so they create positive and supportive interactions every time they interact – as shown by at least a 75% agreement rating in a post-event evaluation	75%	90%
Executive Leader (Regional President)	Use and model the proven LeaderSpeak® method throughout the forum so that at least 75% of participants perceive her as an authentic, responsive, credible, inspirational leader, based on post-event evaluation	75%	85%