

Transcription - Case Study: Managing Teams Remotely

Welcome back, I'm Kim Baillie, she's Fulyana Orsborn and this is Inside Exec. Today we've got a case study to share with you and I'm going to set the scene there. It's a little bit convoluted because the situation is actually a little bit convoluted in that sense. The basis of the case study is a proposed change to legislation that relates to a constitution of an organisation. This legislation is West Australian based because that's where the organisation was first created, but the organisation is an Australia wide organisation. The management of the organisation, so the CEO of the organisation is based in New South Wales, and has delegated this task to a subcommittee. The chairman of the subcommittee is based in Tasmania, is not interested in communicating electronically, shall we say. Everything has to be done by letter, sometimes by phone, but mostly by letter. She is extremely experienced and knowledgeable about the organisation and that was the reason why she was placed in the chairman's position for this subcommittee because of her knowledge of the organisation and its history in relation to the constitution. She has delegated the task of day-to-day interaction under sufferance, the delegation happened to someone in Western Australia who is on the committee, on the basis that communication would still happen between the two before any actual decisions were made, which would naturally happen in terms of a committee. There were other states represented on the committee and that representation has gradually fallen away as the need for input has lessened, so it is basically just these two people, at the present time, reporting back to the CEO of the organisation in New South Wales. The CEO is of a cultural background that doesn't allow her to actively manage people. She would rather let them do things and then deal with the consequences in the best way that she can. She is not an active manager. I would have to say she's a passive manager and that's a cultural thing. She is very good at what she does but she defers to others in the organisation as often as she can or thinks appropriate. The Chairman of the committee in Tasmania is a very strong personality and has often been seen as a barrier to the organisation moving forward in recent times, but is still, as I said, very knowledgeable about the organisation and has great value to add to this situation in terms of making sure that the changes that need to happen to the constitution, will happen in a way that doesn't fundamentally change the constitution itself. The person in Western Australia is probably the strongest of the personalities, very much a person who will just go in and do what she thinks and then tell everyone else later. That's what it is and she is often found in a position of justifying any action she takes, regardless of what anyone else will say.

So we now have a situation where the Western Australian government has said that they'll have this series of workshops to help organisations to make changes to the constitution that will be required in terms of the changes to the legislation. We're very early in that process, we've probably got another 18 months to go before the changes need to come into place. As an organisation, this organisation has looked at the constitution, so they have an idea of what needs to be changed. It's not a whole lot that needs to be changed. The situation that has occurred in the last week is that the Western Australian person demanded of the finance person in the organisation, copies of all of the finance records so that, in her words, she could see how the finances were being managed. This threw up the red flag to the finance person, who said how dare you suggest that I'm not doing things the right way or that you're going to take, and the bottom line was, you're going to take these to meetings where there are people who are not members of the organisation. Our constitution, at this point, says that members

of the organisation can ask for and see the financial records and we have no problem with that but you're going to take this to a meeting where you're the only member of this organisation and you're going to have these financial records in your possession and potentially available to up to a hundred other people who are not members of the organisation. I don't see why that should happen. So what ensued then was a verbal sparring between the two of them about who was right and who was wrong and all of the posturing that happens with those sorts of personalities when everybody's right and everyone's doing the right thing and they're all very busy. The upshot was that the Western Australian person was requested by the CEO to send all of the documentation that is happening around this implementation to the rest of the committee so that they could all advise her of the action that should be taken

and her response was that she would get around to it sometime but she was very busy with other things. So that's where we stand at the moment. How do we recommend that the CEO takes charge of this situation and ruffles or unruffles the feathers or not, as the case might be, and has everyone back working for the same outcome, which is that the constitution will meet the legislative requirements in 18 months time. Now we've taken six and a half minutes to talk about the case study, Fulyana's going to fix it for me in about the same. I'll give her about the same time.

Thank you very much. I guess there's so many things in this case study and a lot of it has been covered in other podcasts, so I'll just call the headings first then maybe the help. Strong leadership is required. Clarity is definitely required and the clarity is in regards to what the guidelines are. Are they still relevant and the latest guidelines for the impending change? So that's guidelines in terms of people's roles and responsibilities. Was that the guidelines of the organisation first? Then definitely, absolutely, about who's responsible for what and the roles they play. In not doing that and communicating it, people are making assumptions and not knowing whether you can use that information outside a certain circle. That person who's extremely experienced and was kept on because of her strength in understanding the company, in fact, she's not really aware of the fact that you can't take this to a meeting by questioning the person responsible for the finance information.

It's a bit like questioning each other so they respect the recognition of each other's value and the most important thing, how they all matter and they have to work together. So teamwork we talked about teamwork before leadership. We talked about communication, understanding roles and responsibilities and company values and guidelines. In this case, maybe a lot of assumptions being made by the CEO, who thinks that they know what they're doing. I respect them and I will not micromanage them and that's very good, except, my advice to that CEO is that you know you need to be a little bit more involved and showing a lot more leadership. The person that is the person with all the information, sorry, don't assume that these people have been here a long time so they know. We all need constant reminders and refreshments, so maybe what to do and what you can't do on the guidelines from the right area. If it's a finance guidelines base, then the CFO can send that around to everyone. If it's about communicating certain information that might be a commercial in confidence, the legal arm. All that has to come from the leader, the CEO, to identify those things and doesn't have to be a confrontation but it's a good reminder we got into this situation because we have forgotten who does what, who's responsible for what, and who to

communicate with whom before you do anything and what are the guidelines. The geography and the personalities are obviously an issue.

We had an extensive session with David Skillen on managing remotely and this is a great thing to bring up right now because this is within the same country and we are still having differences and some time differences, that's right, so we mustn't assume the other thing is enough. I like the idea that this person comes with a lot of knowledge and historic knowledge. The person is not embracing what is basic technology and they're allowed to get away with it. Okay, if we do that, I'm not saying no force them to use it. You can and you'll be right to do so as CEO. However, if you chose not to let them know because you value them so much that you want this from them, you need to be making allowances for us to be talking to you instead of sending an email, for example, and therefore let them know that no, they're not there to do it their way, it's a company, it's an organization, I should say, whatever, and it's got certain values and behaviors and we're a team.

I think that that's probably one of the things that has been overlooked, is that on the one hand they're acknowledging this person's experience and value to the organization, and on the other hand I do hear them constantly complain about the cost of sending mail to this person continuously and we don't have to send mail to anyone else. I guess we're so used to technology, we don't do the comparative value, you know. Yes, you're spending a dollar to send a letter at this point in time, but how much are you spending on that time sitting down to send the email, to compose the email, to send the email to make the phone call? There's still a cost involved in all those things. It's not free, so the comparative cost is probably fairly close to the mark really. You're not spending any more time or effort or dollars on this person who isn't using the technology.

The other thing is, just on that very point, has anyone asked the question, you know, not for an answer, but the question is, has anyone said the email is not so hard to use, I will show you and we will be patient and dedicate time for somebody to sit there or even send them to a local, there's a lot of free learn to use technology courses in each state, or pay for that if the person is refusing.

I don't think it's refusing so much. I think it's part of the persona that has developed. This is an organization where it's artistically based and so there's certain streams that you can follow. There's a traditional stream and there's the modern end or the contemporary stream and this person is very much in the traditional mould, always has been, and I think this is just part of that approach, is that she's quite happy to stay in the traditional mould where she's happy and comfortable. The thing is, we not an island, but the point is that she's still part of the organization and part of a team. If we all wanted our way, it won't work and I think that's where the leadership has got to come in there and the organization does offer both. The organization does say, you know, we can do it by email, we can do it by by post, so if you're offering both, don't resent the fact that you've got to do both.

Okay, I didn't know that the organization was offering both so in that case then, yes totally agree. This way put that one to bed. It's that we all agreed, in other words, to go that way, but I guess looking at this scenario, you can see all the good management practices if they'd followed and if they'd done, it says to me everybody's doing it from a good place but it's still not working. The head of the organization is trying to be a good leader by trusting the

people, trusting they know what they're doing and doing it, but leadership can't be totally absent. That's not leadership.

Well I think it comes down to a personal approach as well and perhaps there is opportunity for some of these people to develop a little bit more in terms of their personal approach. Yes, they've been giving to this organization for a long time but they're at a point where, it seems to me, that they give on the basis of what they get back. It's the "what's in it for me". It's worse than "what's in it for me" because it's "I'm only going to do this because I know I'm going to get this in return and that's going to make me more important or seem more important in the organization". You can't, I don't believe, ever give on the basis of what you get in return solely, because it just doesn't work. You're better off being generous of spirit, of giving, because you want to give for the organization, not for an individual return but for return to the organization, and you'll find, in my experience, that you get more than you've put in. The return is greater than the input when you do it not on the basis of what you're going to get back for your own personal benefit in these situations. I think, in the sort of organization we're talking about, it's we're not talking here about working for pay packet as such, so in this case I think the individuals will do well by reminding themselves why they got there in the first place. They got there for the love of it, they got there because they love that sort of stuff, they love being part of it, they love to contribute, and sometimes they forget and end up in the politics of day to day interactions instead.

It happens in business as well, absolutely, absolutely, and we've talked about how you tread the political path and to me, it just takes away your own enjoyment. I think in this situation, the leadership is the thing that we need to work on first and we need then, as part of that leadership position, is to re-state for everyone's benefit, what the roles and responsibilities are in terms of the constitution because that's what the task is at the present time, so that everyone is clear. You get them to re-state what they see as a leader, you put out these are the roles and responsibilities of all of these people who are involved and what I want you to do, once you've read it, is tell me what you're going to do that relates to those roles and responsibilities. It's no different to, these days we like to see applications from people when they're applying for for positions where they will address the selection criteria, where they address the job description, where they say how their experience relates to what we want them to do, and this is no different. Just throwing it out from another angle of saying, this is the job you're doing, these are the areas of your responsibility, how are you going to do it and reason into that is a reporting structure, so that they know how they have to get that information that they're responsible for back to the organisation or the management committee.

At a broader level, if you look at that suggestion and look at when was the last time that was done, I bet it's more years than anyone can remember.

It'll be like zero, it's not ever been done. So the key is to do it, but also to do it not too frequently, but to do it at intervals that there is a change, whether it's a constitutional change, whether there are new people on board, or with a change of positions, take that opportunity to refresh exactly what you just said. Come back to who's responsibility and guidelines and even if they have been unchanged, it's just a refresher or change in some aspects. It can be the age of an organisation as well. It might have developed from a group of people who

gathered together because they all had the same interests, the same pursuit and so then it was more formalised and it grew and it grew and it grew and not at any stage, until there's almost a generational change, does someone say I don't know how to do this job, I don't know how to do this task, or so and so has done it for all of these years and they've done it so well, I can't do it the same way because I'm not that person. Give me some framework, tell me what to do, and if you haven't got it written down, the things we talked about in the podcast, about knowledge transfer and knowledge management, all of that stuff is important across the board, regardless of the age of your organisation or where you are at this point in organisational growth.

Okay, we've covered it. I hope that when I review and edit this podcast, I will see that herself has given me the resolution of this case study.

Of course I have.

If she hasn't, if you feel that you could add some feedback to the discussion, just drop us a line through email or on our Facebook page and we'd be more than happy to take on your suggestions and share it with everyone. I'm Kim Baillie, she's Fulyana Orsborn and this is Inside Exec.