TCM 130 - Monte Pedersen: Execution Management in Hybrid Work Teams

Mitch Simon: Welcome to another episode of Team Anywhere, where CEOs, leaders and experts at building teams,

Ginny Bianco-Mathis: companies,

Mitch Simon: organizations,

Ginny Bianco-Mathis: and amazing cultures, share how to lead from anywhere in the world. I'm your co-host on the East Coast, Ginny Bianco-Mathis.

Mitch Simon: And I'm your co-host on the West Coast, Mitch Simon, and we invite you to join us to Team Anywhere.

Do your team members want accountability? Yes, in fact they do. But are you brave enough to create an agreement with them and then hold them accountable to that agreement? Such agreements lead to trust, progress and conversations of consequence. Join us today to hear Monte Pederson, Principal of the CDA Group whose promise is to deliver business freedom one organization at a time.

Hello and welcome to another episode of Team Anywhere. I'm your co-host on the West Coast, Mitch Simon and on the East coast, our fabulous co-host, Dr. Virginia Bianco-Mathis. Ginny, how are you today?

Ginny Bianco-Mathis: I am very good today. Actually we have some sun here on the East coast a little bit.

Mitch Simon: Well great. We are going now into like rain for a week on the West coast. That's probably why we'll fall into the ocean. It's not about the weather. You have an incredible, incredible guest, Monte Pederson, don't you?

Ginny Bianco-Mathis: Yes, I do. So Monte is a consultant in the areas of execution management, strategic planning, team engagement, clarity, alignment, performance accountability. And why I love this is because he uses a system that links all that together. As opposed to what sometimes we do as consultants, throw mud at the wall for each one of those things, one at a time.

So, we're gonna talk about those connective links. It's a holistic execution management framework that aligns the senior leadership with the front line. And Monte is coming to us today from Illinois, and he's the Principal of the CDA group. Welcome.

Monte Pederson: Thank you, Ginny, Mitch. It's a pleasure to be with you. Thank you.

Ginny Bianco-Mathis: So, we're gonna start with a question which is what have you learned over the last two years because of this incredible social experiment that we have all been a part of in the work world?

Monte Pederson: That's a really amazing question because I think maybe for the first time in forever, everybody has sat down and collectively thought about what the pandemic has kind of done to us. I mean, it was that profound in terms of its impact and I'm kind of the opinion that there was a pretty significant see change kind of on its way pre covid and that, and that was largely driven by, I, I would say the latter part of Gen Xers, millennials and now, you know, gen Zs.

They were creating I think, significant change in the way, I mean, an old line baby boomer like me looked at things and so, the pandemic obviously accelerated that. And you know, I think we started to think more like, you know, millennials and Gen Zs are thinking now, you know, in terms of is this all worth it? Is this what I should be doing?

You know, after all this time, you know, what's at work? to, To answer your question, I, I think that this change got here a lot faster. So work from home and job flexibility. Prior to the pandemic, it was something like 46% of all jobs were done by people who could work in a hybrid fashion, right? They could work in the office. They worked down the road or they worked from home. So we weren't talking about a large percentage of, you know, 50% of the jobs aren't you have to be in person, right?

Manufacturing or retail based or what have you. So realistically, I think it sort of ironed it all out and said, okay, these are all the jobs that, you know, we can work with some level of flexibility from home. We're gonna find those, we're gonna do those, and, you know, we're, we're gonna probably continue to, to work that way, you know?

Until, you know, something else comes along. But, but, but I'm really big on this idea of what millennials have done because they just, you know, I think we

had opened our eyes. We just weren't willing. They just weren't willing to do things the way previous generations have done them.

And you know, they were willing to not basically, you know, take professional work. If they worked for somebody who didn't invest in their development or give them an idea what they were gonna be doing. I'm just gonna drop out.

Ginny Bianco-Mathis: They left. Yeah.

Monte Pederson: I'll work at the gig economy till I figure out what I have to do or I'll, or I'll take what I was trying to do with you, and I'll do it better.

Ginny Bianco-Mathis: Yeah, excellent point.

Monte Pederson: Yeah. So you've got this pervasive attitude. So if I took that down to me personally, and I know I'm moving on here, but the biggest takeaways were we could do things virtually that we didn't think we could do and and my work especially, I was really tied to the idea that I've gotta be onsite with the clients three or four times a year.

And I still think that's very, very important in terms of growing the relationship and you know, solidifying that. But we figured that we could still get a lot done virtually and pre pandemic, you know, I was basically a domestic based business. Now I have clients overseas.

Ginny Bianco-Mathis: Exactly.

Monte Pederson: I just found myself doing things that I never thought I would, you know, would be doing. And I think, you know, the enhancement of the technology all enabled that to happen.

Ginny Bianco-Mathis: Exactly. I think we all could say that we found ourself doing things we didn't think we could.

So you are in the whole business of, you know, the leadership and strategy in particular. Before we get to the specifics of the system, share with me what attracted you to something like the KeyneLink performance methodology. You know, what did you see happening when you went out into organization and said to yourself, boy, we need something more here?

Monte Pederson: It was really the culmination of a couple of events at the end of my first career. This is a second career for me, basically. I spent 34 years in

an industry and towards the end it got pretty rough. The industry was highly commoditized. I basically came into contact with, KeyneLink and execution management through one of my client locations they were basically using it.

And so, I had an opportunity to work with it as a client for like, you know, three or four years. And I just kind of walked away saying to myself. And I knew the end was getting close for my first career. If I would've had this when I was managing all these people and had all this responsibility I could have made a much larger, more significant difference.

Ginny Bianco-Mathis: Yes.

Monte Pederson: You know, for organizations and for people. So, my exit plan for my first career happened. It took me a whole two weeks to decide, Hey I'm gonna start a business and I'll focus on helping organizations and doing what I couldn't do when I was because I didn't.

Ginny Bianco-Mathis: Well, so then you did share with us what this system looked like. It might be great if you did an example. So, there's a company and they're doing strategic planning. Let's start there.

Monte Pederson: Yeah. That's a good place to start because the reality of most strategy execution management theories, I guess is that people don't understand how it's done or how it's supposed to be done.

For example, people use the term strategic planning. There's really no such thing. You have strategy and you have planning. I mean, strategy is the formulation of your idea. So, it's a theory. It's a guess as to what we think we can do. And planning, we all know we're very, very comfortable with, and so we kind of tag those two things together, but in reality, they're two totally separate things.

So you have this, you just have all of these different organizations out there that do it their own way and most of it is not effective in terms of how they do it. And so, the idea behind KeyneLink and execution management is that you're basically taking strategy and execution and you're thinking of it as one and the same. You can't execute without a strategy and you can't do strategy really well without, without solid execution.

So, we've got really a resource or a tool that helps organizations align the daily tasks and activities of everybody on their team with the strategic objectives of their organization. So, let me give you an example.

So, we take, and we create a set of initiatives, call them strategic objectives at the highest level of the organization that we wanna achieve.

And most of the time what an organization will do is they'll just depend on their leadership at each level.

Ginny Bianco-Mathis: Right.

Monte Pederson: And their expertise to kind of take that down and translate it throughout the organization. Well, you know, if you create a strategy at the top by people , for the top, at the top, essentially everybody at the top understands it, but nobody below it does.

And so you need a mechanism that gets the whole team focused on having the right strategic, you know, point of view. You know, what are we trying to accomplish? And so, what KeyneLink does is it effectively translates the strategy throughout the entire organization. It has a built-in feedback loop, so we're just not in traditional strategy execution terms. We're just not dictating to the people what it is they have to do. We're basically saying, okay, these are the initiatives that we've established for this year. What do you see as your part? What do you think you can contribute?

You know, how can you contribute to this. And then they give their perspective and their opinion back, and then that obviously fills in gaps of information and informs leadership on what's happening at their level. So basically that level, once they understand that, they'll develop a set of initiatives that make solid sense to their people, right?

You're not talking about the language of the C-suite leadership. You're talking language at their level. So, this is how we're gonna contribute, and so we'll create initiatives and then we'll write goals for those.

Ginny Bianco-Mathis: So yes, yes. You hit the point where then it goes to the individual, right? So every individual then has to have you don't call it a job description necessarily, but here's what I have to do on this job.

Monte Pederson: That, that's right. We outline expectations through something that we call a performance agreement. And a performance agreement is nothing more than a collaboratively developed document or an agreement between a manager and a direct report that lays out their expectations.

And there's three components to it. We tell 'em primary job responsibilities, you know what does the organization count on you doing in order for you to be successful in your job?

And then goals and tasks, and then a schedule of progress meetings that take place every 30 days.

Ginny Bianco-Mathis: There's the key.

Monte Pederson: Yeah. So we're managing people at an individual level. So when we go back to the department and say, okay, here's the initiatives. Let's write goals for each of these individuals that will drive the success of that initiative that supports the strategic objectives of the organization.

So it's really a choice cascading model where by every level, and you go down, you're basically creating initiatives that make sense to those people that tie back into what you're doing and that contribute to the overall success of the organization. So everybody, everybody gets, everybody gets on the same page.

Ginny Bianco-Mathis: I love that. And that explains to me the technical side of it, you know, because to me what you described is that's how most quote-unquote strategic plans are supposed to work, and of course they don't and they break down, et cetera, et cetera. All right, so now you have this system that creates the right conversations. Is that correct?

Monte Pederson: That is correct. It's the most powerful thing about it, Ginny, is that it's a collaborative communication framework that creates conversations of consequence.

Ginny Bianco-Mathis: Yeah, that's cool.

Monte Pederson: So every, every 30 days we're sitting down and again, a performance agreement is a partnership. So we're basically taking that individual direct report. We're managing them effectively, we're managing them individually, but we're also giving them a partner and saying this person is invested in your success and it's, it's up to the two of you to work together to accomplish this.

Ginny Bianco-Mathis: That's cool.

Yeah. Because it's very, very powerful when you have a manager basically saying, if this person fails, I fail.

Mitch Simon: My question is, I really like to understand, I like the way you're calling it a performance agreement, and so the agreement is what the direct report what his or her job responsibilities are, goals and tasks, progress meetings. So what is the agreement on the manager side?

What does the manager agree to in that agreement?

Monte Pederson: The manager agreement comes from the development of the agreement. So basically nothing gets on a performance agreement without the consent and approval of both people. So, they actually have to agree. So, you have the benefit of the manager who's basically saying, okay, this is the job, this is what we really need.

Are you comfortable doing this? Is this something that, you know, you think you can achieve? The nice thing about performance agreement development is that a manager can't sit there and dictate to somebody what it is that they'll do and they get no pushback, right.

So basically the beauty of it is once this agreement is approved and enforced, basically they're saying, okay, we're aligned here. We can get this done. I'm gonna achieve these goals. These are my day-to-day responsibilities. I'm gonna work hard at those and do a great job at them. But I fully expect, you know, to accomplish the things that we've established in this agreement. And that's what drives the departmental success and you know, starts adding up.

Ginny Bianco-Mathis: Well, you showed something else with me, or I read it in the materials, and then it has this whole other level. If we start talking about, so what's the benefits of all of this? You got a system, right? And now you have these right conversations, and then you get to how does the leader really cause engagement and demonstrates empathy? I think you had like four questions that they all need to learn to get comfortable with asking.

Monte Pederson: What you're referencing Ginny is the cultural component of KeyneLink and the process that we use and it's really, really important. I mean, if we just looked at execution and said, this is how you can solve every problem in business, right? We'd have no problems. Right?

Ginny Bianco-Mathis: Right.

Monte Pederson: But the reality is you need some, you need some elements in place if you're going to, if you're gonna do that successfully and culture is you know, culture is one of 'em, obviously. Having high levels of emotional

intelligence, practicing psychological safety. I mean there are just some things, you know, that are inherent in the process.

So, the way the progress meeting is designed, it's to build trust and respect between that manager and the direct report so they can open up and have those conversations. Because you want people telling you if there's a problem, right?

Ginny Bianco-Mathis: Right.

Monte Pederson: If somebody's struggling at home, you don't necessarily wanna assign 'em to a major project team at that time, right? You kind of wanna help 'em through. So we try and keep this cultural element front and center inside the process and one of the ways we do that is through something that we call core behaviors. So, when you look at the foundational elements of most organizations, everybody has mission, vision, you know, core values and guiding principles so on and so forth.

But we use four, we use mission, vision, core behaviors, and, and we use strategic initiatives, but the difference between a core behavior and a core value. Core values are largely aspirational and they're, they're more for the benefit of the organization, whereas, core behaviors are kind of, we define as the minimal behavioral standards for everybody on the team, so they apply to everybody.

And so, inside the progress meeting, we rate and measure how people are adhering to the level of core behaviors. And that's an every 30 day opportunity to keep culture front and center, you know, with, with your people and talk about, if competitiveness or good judgment, or if you have a core behavior centered on those areas, somebody's not living up to that you're calling them out every 30 days. You're having that, you know, hard discussion with them.

Ginny Bianco-Mathis: All right. That's how you get at it. So, so that is part of the discussion also in terms of achieving goals.

Monte Pederson: That's right.

Ginny Bianco-Mathis: You're not being collaborative enough or you're not building trust with the other two people on the team

Monte Pederson: That's right. One of the beautiful things about our system is that, and I tell this to, to CEOs and senior execs who enlist us. You're gonna surface every problem and issue that you have. If you do it right, you're gonna surface every problem and issue that you have inside this organization.

Ginny Bianco-Mathis: That's right.

Monte Pederson: So be prepared. But the net of that is when you get those things surfaced, the drama, the politics, the bs, I mean, it all goes out because anybody can call anybody out at any time. And, and that's just a thing that's so lacking in business today.

Ginny Bianco-Mathis: And so now the killer question is how does this translate into the new environment of hybrid and virtual?

Monte Pederson: I've been asked this question before and I've thought about it a lot and the reality is it really doesn't matter whether it's hybrid or virtual because you are asking the right questions. You're having the right conversations and people treat each other the same way. Whether they're behind a microphone in a computer screen or if they're sitting right there in your office.

Ginny Bianco-Mathis: Because you have those behavioral code too. I think that is such a fabulous layer and all three layers now are linked. 'Cause you put it on all of your LinkedIn stuff, which I love by the way.

You know, being authentic and asking those powerful questions and demonstrating empathy are the kind of behaviors that are being demanded right now. Because of having hybrid, virtual sitting side by all of it.

Monte Pederson: Yeah. We have to think differently, right? In terms of, how we lead our people. I would contend that people aren't that hard to lead, right? They just wanna know what's expected of them. And they want you to be honest and—

Ginny Bianco-Mathis: And listen to them.

Monte Pederson: And obviously have, you know, have empathy for them and work with them when they have tough times and, you know, give 'em a pat on the back when they, you know, when they do well.. It's not a complicated formula by anybody.

Ginny Bianco-Mathis: Well, except now let's throw the ringer in. You have a leader or you have a manager further down and they're not doing a good job with this. I mean, they're just checking off the box.

Monte Pederson: Yep.

Ginny Bianco-Mathis: So what do you all do? Well shoot him into space.

Monte Pederson: The fortunate thing, there's an element when people first see KeyneLink and see execution management, at least in the way we do it, that it's a little bit big brotherish, right?

That it's this oversight. But we position it more as general accountability, but that still means there's accountability. And so, one of the inherent advantages in the system is that everybody has a manager, right? And so, if that manager is being mechanical, let's say it, and they're not, you know, using the system correctly, they're gonna get called out on it. And the thing that we see is if people don't want to be accountable, they usually leave the organization.

Ginny Bianco-Mathis: Mm-hmm. Yes.

Monte Pederson: So it's just really nice when, you know, you can sit down with that person and say, okay, you know, you've been fairly rigid in your management approach. What's driving that? What can we do? What can I do to help you get better at that?

Ginny Bianco-Mathis: There you go.

Monte Pederson: You're giving them every possibility and chance to succeed and do well. I mean, you know, I mean, let's face it, right? We're having significant issues with turnover and job satisfaction.

Ginny Bianco-Mathis: Yes, absolutely.

Monte Pederson: It's like you can do yourself a lot of good by, you know, just talking to people.

Ginny Bianco-Mathis: Yes. Making it discussable and the system allows that.

Monte Pederson: So, so yeah. So they'll generally, either fix the problem or they'll weed themselves out.

Ginny Bianco-Mathis: I'm drawing this to a close. How do you enter an organization? How do you quite frankly engage them to say, wow, this is something we need? 'Cause I can see some CEOs say, nah, no thanks.

Monte Pederson: The two words I'd use to describe how we onboard people is very carefully because what I find is you get leaders who are very enamored with the process. And they love the process. They want the process, but they don't wanna participate.

Ginny Bianco-Mathis: You're right. You all do it. It's a great thing. Go ahead and do it.

Monte Pederson: Yeah. I'm gonna have my admin here. We go to great lengths. I have this process called, I call it an executive pilot, where I go to the CEO and I say, okay, if you're gonna do this, this is what I need from you.

And it's basically, we do it over four to five weeks. Mostly to accommodate a CEO schedule. But I need 10 to 12 hours of your time over the next month. And I'm gonna take you through the process of execution management from end to end. You are going to experience everything that you're gonna expect of your people and we're gonna build your performance agreement and then we're gonna go share it with your people.

Ginny Bianco-Mathis: All right. Alright. That's fantastic. Yes.

Monte Pederson: That does two things. One, it tells them whether this is the right process for them and there have been some that have, you know, chosen to, you know, disband at that point.

But it also tells me whether or not I, you know, I wanna work with them.

Ginny Bianco-Mathis: That's right.

Monte Pederson: Because I'm getting too old and long in the tooth here to work with organizations that you know, that don't wanna help their people succeed. I would rather not waste their money and have them waste my time.

I would rather work with somebody who, you know, who wants to help. We can make this thing really, really successful and do good for them, and do good for their people.

Ginny Bianco-Mathis: Exciting. Monte, how can people get in touch with you?

Monte Pederson: Probably the two easiest places. My, my website, the CDA group, is at www.clarifydeployachieve.com that's what CDA stands for.

Ginny Bianco-Mathis: Terrific.

Monte Pederson: And then the other way is on my LinkedIn site, Monte Pederson, P-E-D-E-R-S-O-N. I post every day. I'm pretty easy.

Ginny Bianco-Mathis: I know. I love it. I don't know where you're getting your stuff, but I keep making copies of those charts. Fabulous. Really. Thank you.

Monte Pederson: Oh, you're welcome. I appreciate that feedback.

Ginny Bianco-Mathis: Mitch.

Mitch Simon: I've been taking a lot of notes and what I like is you have a system for helping people become accountable, and it's through an agreement, and I like that. I like that the fact that it's through an agreement and it's not one-sided.

Ginny Bianco-Mathis: Yeah.

Mitch Simon: And that just makes sense. It just makes sense. It makes sense in a time right now where people want honest conversations and they wanna know really what they need to be doing. So, I really encourage people to reach out to you and understand your system for execution management.

So thank you Monte for coming into the studio today. Thank you Ginny for co-hosting as always. And thank you to our listeners. Please share this episode with your friends or family or colleagues, and we'll see you next time on our next episode of Team Anywhere.