Bringing Stakeholders Together

Now that you've identified your problem statement and your stakeholders, it's time to involve them in the most relevant ways.

Keep in mind that you are going to involve the different stakeholders in different ways. You wouldn't gather senior leadership together in a regular meeting but you may attend certain meetings to provide wellness status updates or schedule one-on-one meetings with them.

For middle managers, you may bring them together in a in a group, but you'll more likely need to involve them in different ways—through one-on-one meetings, attending their team meetings, or via regular email communication. You may have them interspersed within a team you assemble along with other stakeholders using wellness resources.

Before you set out to assemble a team, workgroup, or committee, answer the following questions:

Is there anything similar within the organization that is already assembled? If so, could you tap into that group instead of assembling your own?

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If not, why would someone want to join your group? What's in it for them? What would be the benefits of becoming a part of your group?

Some ideas include:

» Position it as a leadership opportunity.

» Connect it to their individual performance.

» Offer recognition from senior leadership.

» Write to their direct managers detailing their contributions.

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What type of experience do you want them to have? Do you want it to be fun, tap into their creativity, or feel like a community? Decide at least three descriptors of the type of experience you want them to have.

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Now, list the ways you can create the conditions for that experience to happen.

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How can you create a diverse and inclusive environment (where everyone feels fully involved)? Is your workforce fully represented? Are people who don't "fit" the stereotypical model of wellness included?

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The invitation: How do you invite stakeholders to be a part of the group?

Some ideas include:

» Directly reach out to the people you identified in your power mapping.

» Ask for manager nominations.

» Use an application process.

However they are invited to be part of the group, *make sure they understand the problem the group is assembled to solve*. That way, they can confirm they are the right people to contribute.

Please note: There is no set number recommended for a team of stakeholders (commonly represented as champions or ambassadors). If you work for a large organization, you may have many wellness representatives. If you work for a smaller organization, fewer representatives may be sufficient. The key is that a diverse group of your target audience is represented.

Email invitation example (direct to individual):

Subject: You're Invited!

I'm leading a collaborative group to understand how to leverage our wellness resources to maximize recruitment and retention. [The what or problem statement; introduce yourself if needed.] Since you are directly involved in the recruitment process, I thought you would be an excellent fit for this group. [Tell them why you selected them.]

Just so you know you're spending your time wisely, being a part of this group would help connect you with employees across the organization and give you some visibility with leadership. [Benefits—What's in it for them?]

Our first meeting will take place next month at 1 p.m. and then monthly for the remainder of the year. [Offer the starter details but not too many to overwhelm them.]

Does this sound of interest to you?

If so, I'm happy to provide you with more details.

Email invitation example (direct to manager):

Subject: Do you know of a good fit?

I'm leading a collaborative group to understand how to leverage our wellness resources to maximize recruitment and retention. [The what or problem statement; introduce yourself if needed.] Since you lead a team that's directly involved in the recruitment process, I thought someone from your team would be an excellent fit for this group. [Tell them why you are emailing them.]

This group is sponsored by [enter name]. I'm looking for a person who enjoys collaboration, will provide input to the group, and will be able to balance this with their current workload [describe what type of person you're looking for].

The time commitment is two hours a month, with one of those hours being an in-person meeting. The group will last for the year and will be re-evaluated at that time.

Do any names come to mind?

They've said yes to being involved…now what? Outlined below are critical steps to ensure you'll create an engaged group that helps solve an organizational problem.

1. **Set clear expectations.** Create an agreement about what you expect of your representatives. See the *Sample Agreement* included in this toolkit. Although this written agreement may seem too formal, it's vital to clear up any uncertainty to prevent communication problems later in the process.

    It's ok if someone you selected cannot commit to the expectations. It's better to learn that at the beginning of the process.

2. **Prepare for the initial meeting.** The first meeting of your group should set the tone for how you will interact with each other, define the norms of the group, and start clarifying any protocols for communication. Keep in mind the environment you want to create. See the *Top 7 Meeting Facilitation Tips* for helpful tips.

    In general, you'll want to include the following items (see the *Sample First Meeting Agenda* in the toolkit).

    a) **Opening/connection.** This can be less than five minutes, but it's important to have time for the group to connect with each other.

    b) **(Re)state the problem you are trying to solve as a group.** They would have already seen this problem statement via their invitation to the group, but it's helpful to set the basis for the work and invite questions and upgrades to the wording. This helps build their ownership of the problem.

    c) **Review expectations and decide on group norms.** Start by reviewing the expectations of their agreement. Then, ask them, "What would make you want to contribute to this group?" Document their answers and show them their answers at subsequent meetings as the group norms.

        i) Examples of group norms include respect (practicing curiosity and listening), inclusion (everyone's voice matters), and accountability (the group understands who's responsible for what).

    d) **Identify the desired outcomes.** Once you have stated the business-related problem, imagine that the solution has been accomplished. Ask the group these questions and write these desired outcomes where all can see them.

  i) What are all the things that you would have, see, know?

  ii) Who will benefit? Who will be affected? What would they have, see, know?

  iii) How could we measure success? How will we know we're "done"? How do we know we are on the right track?

e) **The work.** This is the meat of the meeting where the group works together to produce an outcome. This should be centered on the problem/opportunity statement.

f) **Assignments and taking action.** Who owns what and when is it due?

g) **Check-out.** This invites participants to give you their sense of how the meeting was. Listen carefully to see where you may need to help people build their level of ownership and alignment. You'll get clues about who you may want to follow up with one-on-one before the next meeting to find out more about what's on their mind or enlist their help in some way that builds their ownership and alignment.

h) **Closing.** Thank them and establish/state the next meeting date.

Building Momentum Between Meetings

Collaboration is like a flow of energy. We know from the world of quantum physics that when two waves are coherent with each other, the energy that's produced is four times greater. In collaboration, it works the same.

When people come together in a meeting and get coherent with each other—meaning that they feel enough ownership and have sufficient alignment around what they're going to do and how they'll do it—the energy from that meeting can be four times greater than just the people in the room.

But that energy can die quickly. Things happen that push the team out of alignment with each other. These misalignments show up as conflicts. People forget to do what they said they'll do. Or nothing was committed to in the meeting so all that energy disappears like smoke.

But you can continue and even build collaborative energy between meetings. Like a snowball, one small success turns into a little bit larger success, and so on. Here are some best practices for building momentum in your collaborative process.

1. **Build VISIBLE accountability that connects meetings.**

 a) Keep a list of actions that occur during any meetings, and close every meeting with a review of new actions.

 b) Be sure every action has one owner named, a due date, and any helpers who should be included.

 c) Ideally, this is a list that every team member can see, access, and update as things change.

 d) Make sure there is time to review unfinished actions from the previous meetings. Discuss what got in the way. Identify what needs to happen to address any barriers.

2. **Keep a "Parking Lot" of issues and opportunities that weren't able to be addressed during the meeting.**

 a) Record the name and exact words of the person who named the issue.

 b) Either address, assign, delete, or defer the Parking Lot items at the end of the meeting. This simple practice will build trust and avoid the energy leaks that come from uncompleted, unaddressed things. It helps everyone feel heard and diffuses a lot of games that people play when they are NOT heard.

c) For "assigned" and "deferred" issues, set aside time at the next or a future meeting for the item(s) to be resolved. Again, this is a highly respectful process for ensuring that everyone has a voice, that anyone can bring up a topic, and that you as facilitator will protect the process of making sure the item is dealt with appropriately.

3.   **Think about how each member of your project team (we'll call this the "core team") could reach out to others who aren't in the meeting.** These second-order participants can provide feedback, identify issues with a plan that the team may have missed, or take on tasks that the team can't or shouldn't handle themselves, for example.

Being smart about who each of your members can connect with between meetings will turbocharge your core team meetings. This keeps the conversation alive and your meetings charged up with new information that will keep your project/program/effort on track with reality.
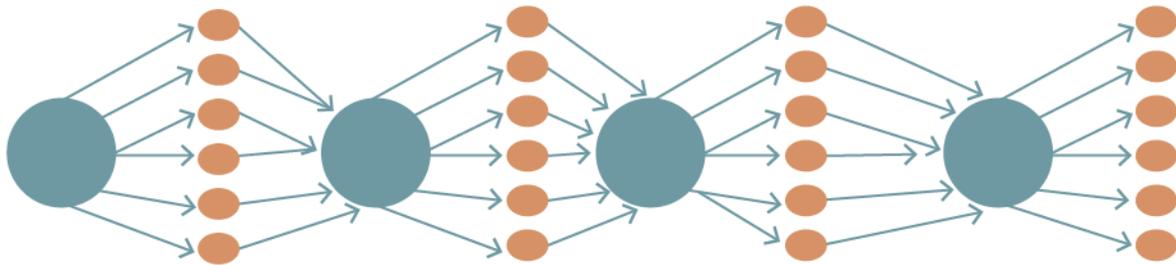
It looks like this from the team member point of view: