

Welcome to  
**Employee Ownership Association**  
Annual Conference 2018

Where employee ownership meets

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# Strategy Workshop; Communication and engagement strategy in the early years of EO

Facilitated by

Adam Campbell, Telos Partners

John Harris-Burland & Michelle Leggatt, MindWorks Marketing

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### Strategy

Strategy is at the core of everything we do, it's the launch platform for our work. We can help with marketing and communications strategy. We provide full outsourced marketing support for some clients and one-off projects for others.



### Advertising

Webster's says that advertising is "the action of calling something to the attention of the public especially by paid announcements". In essence that's true, but we believe it's about so much more.



### Branding

Brand plays a key role in all of our businesses. How we present ourselves and the business, how we speak and the way our staff behave. Everything has an impact.



### Digital

Some people say 'digital' as if it's a subset of what we do, not, it's everything we do, isn't a single aspect of marketing today that isn't in some way.



### Events

Events can bring a brand to life.

## TELOS PARTNERS

Home Our Proposition **Our Expertise** Our culture Events Careers ME+ Contact

Our Expertise Boards Culture Talent Innovation People engagement Leadership

## OUR EXPERTISE

Telos Partners is a strategic organisational change consultancy that works with senior leaders and their teams to set their strategic agenda and follow it through to execution. We know that organisations are a product of the relationships and skills of their people, as well as their network of partnerships. Organisational change can therefore only be achieved by addressing behavioural change in parallel with strategy development and implementation. To be successful, any change initiative must address these two elements in tandem with a focus on the rational, the emotional and actionable – think, believe, act!

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## Poll

What stage of the journey are you?

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# Desired outcomes

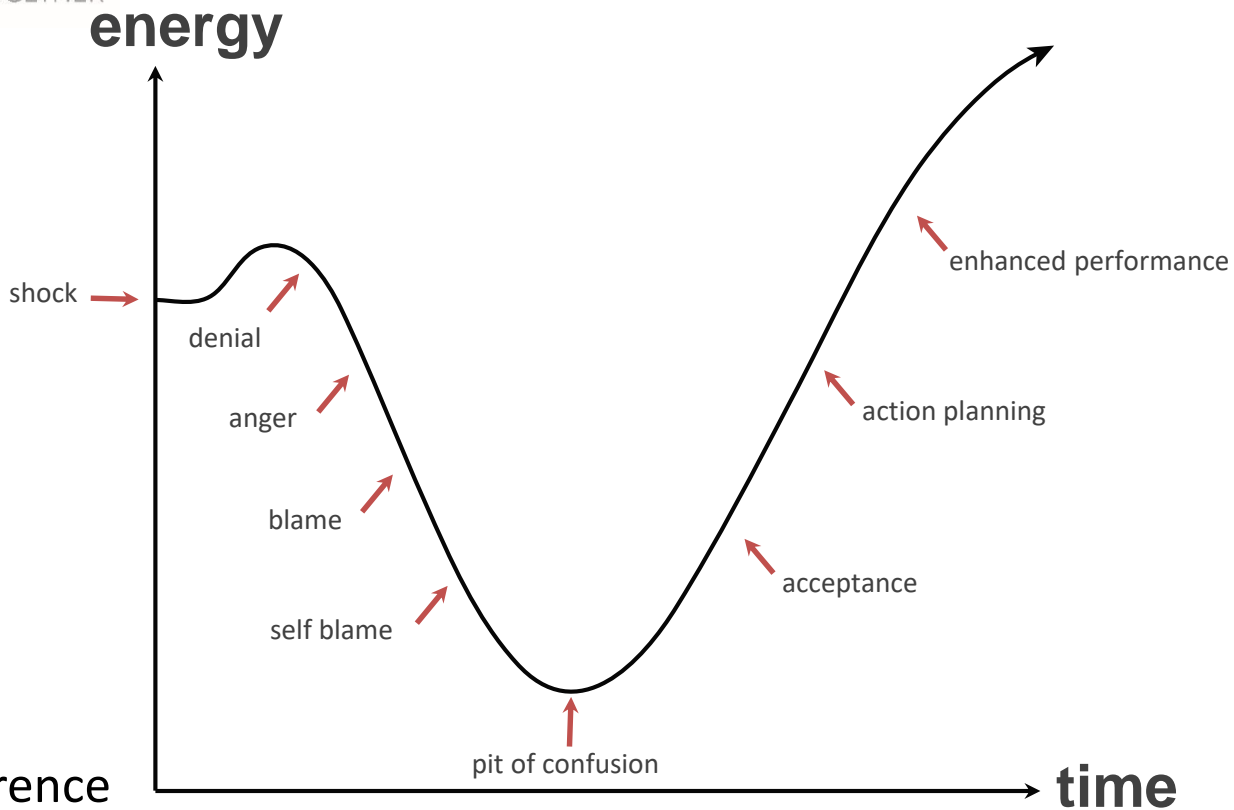
- assessed where you are in the your engagement journey
- explored relevant tools and techniques
- developed a set of actions to take in your business
- be inspired to share your story with others

# Session outline

- Key concepts and frameworks
- The MindWorks story
- Applying the lessons learned
- Questions?

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**D**issatisfaction  $\times$  **V**ision  $\times$  **F**irst steps  $\times$  **R**esistance to change



Level of dissatisfaction with current situation



Awareness of a clear “better” alternative



Clear first steps to achievement



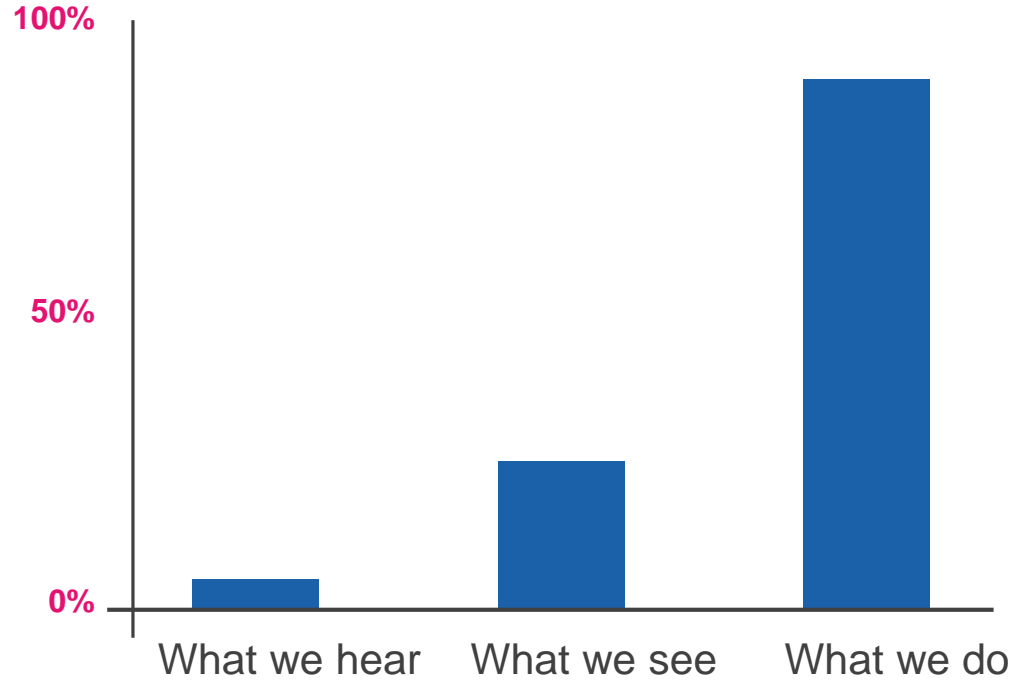
Degree of difficulty or disruption generated

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Source: David Gleicher

“People will forget what you said, people will forget what you did but they will never forget how you made them feel.”

Maya Angelou



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We are up to **22 times more likely to remember a story**  
than a set of disconnected facts such as bullet points

Cognitive Psychologist Jerome Bruner

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## Poll

*Considering your stage of the journey  
what questions do you have?*

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# 24+

- Exit strategy – What do you want?
- Succession planning – Do you have the inhouse capabilities?
- Options
  - Carry on
  - Continue as owner and hand over management
  - Hand over both and walk away
  - Combination of the above
- Investigate options for ownership
  - Trade sale...

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# 18

- Official presentation to the board of 'Decision'
- Presentation of options
  - Trade Sale
  - Management Buyout
  - Employee Ownership Trust EOT
  - Hybrid
- Valuations and numbers
- 'Management' (Staff comms)
- Join EOA!

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# 12

- Legals
- Financials
- Due diligence etc...
- HMRC Clearance
  
- Company meetings and presentation
- 'Ownership' (staff comms)
- 1-2-1 director meetings
- Talking to other EOBs

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# 6

- Staff Announcement (in confidence)
- EO Day
- Elections
- Brand value check
- Key Customers 1-2-1s
- Start updating
  - Stationery
  - Website
  - etc

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# 0

- Official Signing
- Election results
  - Staff Trustee
  - Staff rep on the board
- Email suppliers
- Email all customers
- New collateral goes live

Over to you!

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# 3

- Company meeting
- Trust meeting
- Suggestion box
- Opinion Poll surveys (not votes)
- X department committees
- Speakers

“Profit with purpose”

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# 6 +

- On going company meetings
  - Results
  - Projects
  - Committee reports
- 2<sup>nd</sup> Trust meeting
- EO events
- Training
- Speakers
- Suggestion feedback and implementation

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# + Beyond

“Profit with purpose”

Continue to encourage attitude of ownership and taking on responsibility

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## Poll

*What will you 'steal with pride'?*  
*(ONE ANSWER PER TABLE)*

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# Discussion

*What have we tried that could improve the MindWorks story?*

*please capture on a post-it note  
add it to the relevant stage of the journey*

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Individually take 2 – 3 minutes to list your stakeholders



At your table form a groups of 3 – 4 people

Pick a stakeholder from one business then discuss their needs



For that stakeholder, develop a core message

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Now discuss what method(s) you will use to deliver the message

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## Poll

*As a result of this session, I will ...*

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**Thank you.** Please make your way to the  
Exhibition Hall for Refreshments & Networking

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