| Leadr. September 2019       | ) |     |                   |                                       |
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| Brand Strategy Presentation |   |     |                   |                                       |
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# The **Components** of a Brand

- Wants, needs, motivations

- Frustrations

- Context and bias
- Cultural trends & forces

*Customer* & *Culture* 

Company & Claim

Category &

Competition

- Defined arena

- Positioning of competition

- Ownable opportunities

Mission, vision, manifesto
Internal culture
Provable product claims
Unique characteristics



| utural Context |
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#### **CULTURAL CONTEXT**

# Workplace dynamics have changed.

# People expect more from both their workplace and their manager.



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Weyerhaeuser CEO Devin Stockfish in an interview with the Puget Sound Business Journal. Printed 8/9/2019.

#### "We have a very strong focus on people development at Weyerhaeuser because we know our success depends on talented, engaged people who are empowered to try their ideas."



| CULTURAL CONTEXT<br><i>Employees are seeking:</i><br>• For the opportunity to learn<br>and grow | $\begin{array}{c ccccccccccccccccccccccccccccccccccc$   |
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| • To be given a voice   |   |
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#### *yanization success,* , depends on:

### ND engaged employees

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# If expectations are not met, employees are not afraid to leave.

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#### **CULTURAL CONTEXT**

**66%** of employees are not engaged or actively disengaged\*

\*2018 Gallup survey of 30,628 U.S. employees

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| And this change in expectations is only set to increase   |                        |                       |       |
| Millennials will<br>make up 75% of the<br>workforce by 2025   |                        |                       |       |
| WORKIOFCE DY 2025   |                        |                       |       |
|   |                        |                       |       |



## *The disconnect between employee expectations and organizational reality makes day to day management difficult and long term succession planning and development nearly impossible.*

# You can't afford to avoid the disconnect anymore



| CULTURAL | CONTEXT |
|----------|---------|
| COLIONAL | CONTEXT |

Those who successfully navigate the change will reap the benefits...

A thriving and engaged workforce of future-ready leaders

Those who don't will suffer loss...

## A shortage of new leaders who will continue driving toward the mission



# We all know what we want from our people...

Better outcomes

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Better engagement

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# But how do we get there in this new era of employee expectations?





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| You've probably tried                 | And th                                |
| Playing training videos o             | • When was<br>Did they g              |
| Assigning leadership books o          | Did they e<br>know how                |
| Sending them to conferences o         | Did anyth<br>they came                |
| Continuing to use the same HR tools • | • Accurate i<br>nothing p             |
| developed in the '80s                 | or easy to                            |
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#### he result?

as this made? get anything out of it?

even read it? Do they w to apply the concepts?

hing really change once ne back

record keeping, but personalized, real-time o use.



#### **CULTURAL CONTEXT**

On top of that, existing people management systems are static and cumbersome, made for compliance rather than employee development.

One time assessments during hiring process

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Unstructured & undocumented one on one check-ins

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Each managed using a different disconnected tool

Once a year formalized feedback during annual review

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#### **CULTURAL CONTEXT**

#### So, what stands in the way?

#### Busy Schedules

Generational Gap Lack of Confidence in Leadership Abilities Inconsistent Managerial Skills Across Teams

Feeling disconnected from Employees



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|  | What's the answer? |
|  |                    |



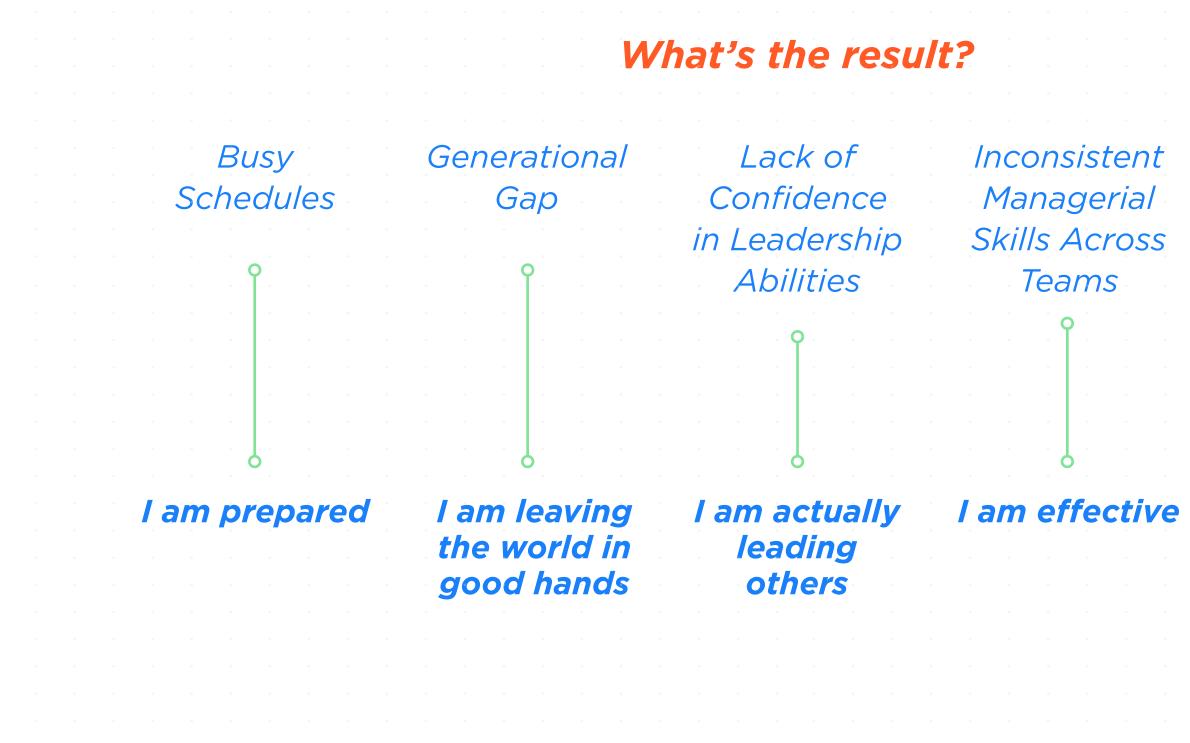




# Measuring **Progress**







Feeling disconnected from Employees

I know how to motivate and get the best out of each person

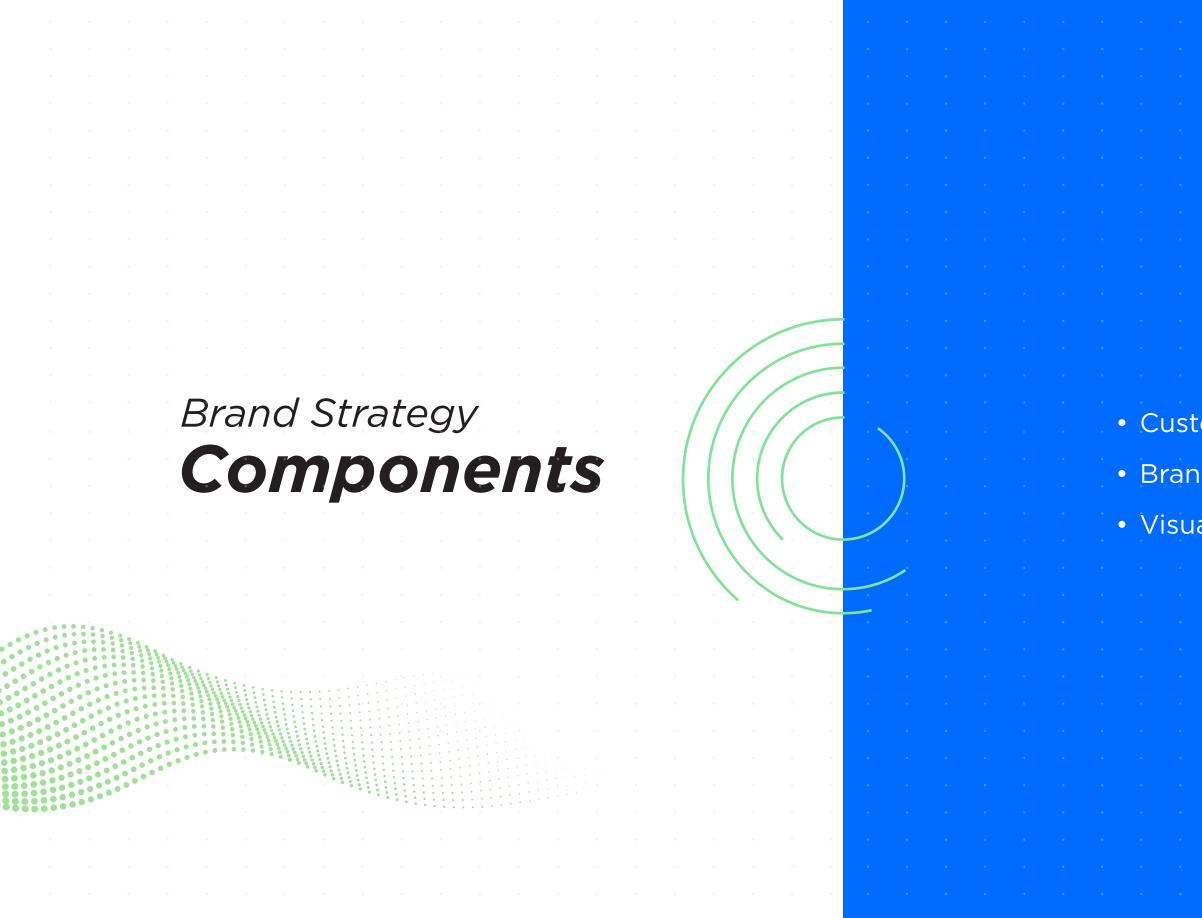


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|   | The next generation<br>of people management<br>is upon us |
|   | Are you ready for it?                                     |
|   |   |
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| EADR EADR  |
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| People management<br>software built for<br>the next generation<br>workplace. |
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## While most churches lack formal, structured development plans for their employees

Instead, they rely on passive techniques like 'shadowing' and 'learning by being in the room.' They feel the need for succession planning due to church planting goals and aging senior leaders.



## While there is a lack of personalized progress tracking and goal setting for employees

They rely heavily on

The results of these tests determine the ways employees are managed, rewarded and viewed within the organization.

# personality assessments during hiring and onboarding.



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| Because there is a large<br>range of managerial<br>skill-sets within an<br>organization             | Many orga<br>only hire s<br>and driver                |
| AND   | Instead of com  |
| Because older<br>generations believe<br>employees must own<br>and initiate their own<br>development | structured lead<br>program for th                     |
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the organization.

Showing the need for a flexible 'one-size fits one' framework which can also scale across employees and departments.

# They still struggle with a lack of communication and focus across all levels of



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#### **BRAND FRAMEWORK**

#### **Brand Arena:** the established category your

#### product best fits into.

- This makes it easier for potential customers to find you and quickly understand the essence of what you do.
- It is extremely rare, and difficult, to create a new category.
- We don't differentiate on arena, we differentiate within the arena.

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## Which falls under the bigger umbrella of...

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#### omers search for solutions, s industry category...

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#### Direct

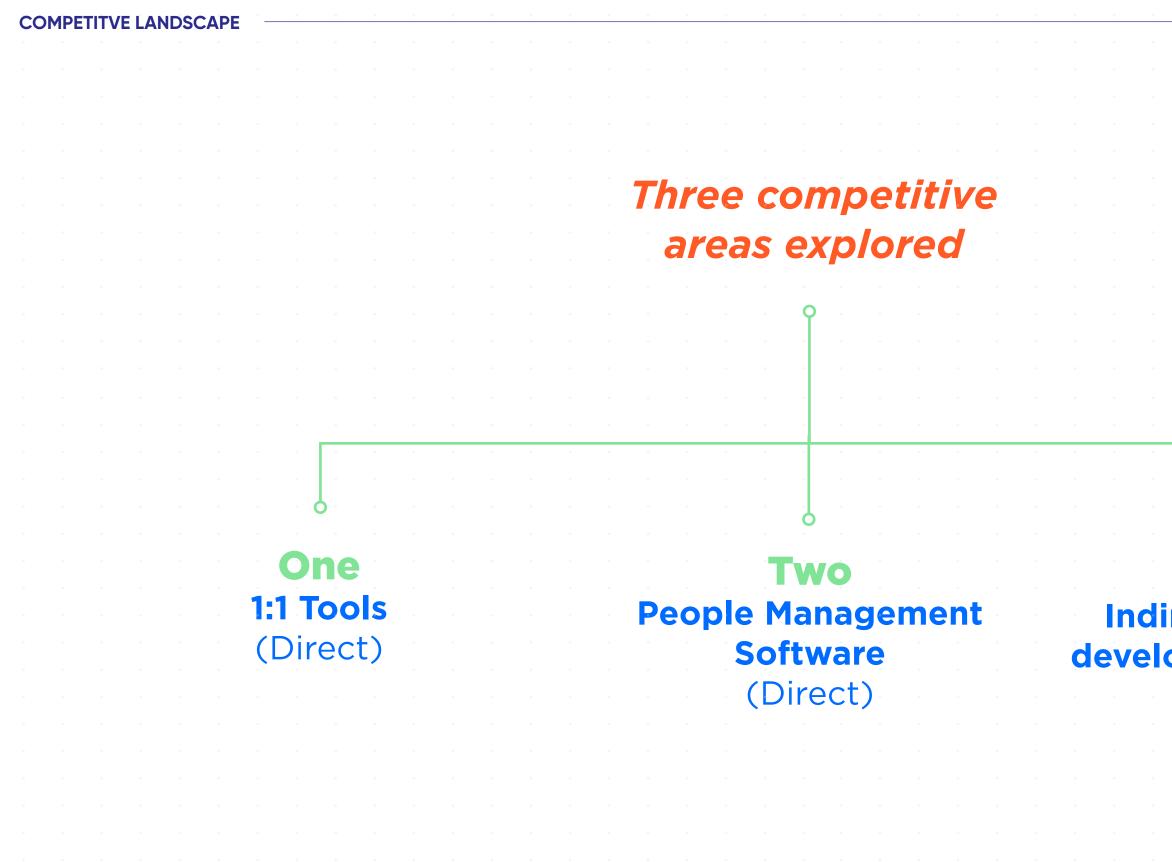
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Solves the same customer problem in a similar way, i.e...developing leaders using software

#### Indirect

Solves the same customer problem but in a different way, ie...developing leaders using conferences





#### **Three** Indirect leadership development solutions





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#### 1:1 Software and People Management Software

#### Grow Managers

**Lighthouse:** Lighthouse builds better managers.

**Fellow:** An app designed for managers and their teams. Manager's co-pilot. Modern workplace.

**Soapbox:** The manager's sidekick! Let us do all the work for you! The agenda tool which fuels your 1:1. Save time, communicate better.

#### Grow People & Potential

Lattice: the people management platform, forward thinking companies, help us make work better, drive performance & engagement.

**Bob:** the platform that grows people. Transforming the workplace experience, together.

Impraise: people enablement platform. Grow your people, grow your business. Unleash potential. Always be learning.

#### Smarter, Modern Data-Driven Tech

**Core:** smarter HR tech that delivers proven ROI, futurefocused technology

**Ciphr:** HR software that connects you to your people data. Manage entire employee lifecycle.

Cezanna: smarter HR software, modern, modular.

**Reflektive:** The first people management platform that helps employees and managers work better together. Our vision is to help people reach their full potential.

#### Continuous, Flexible

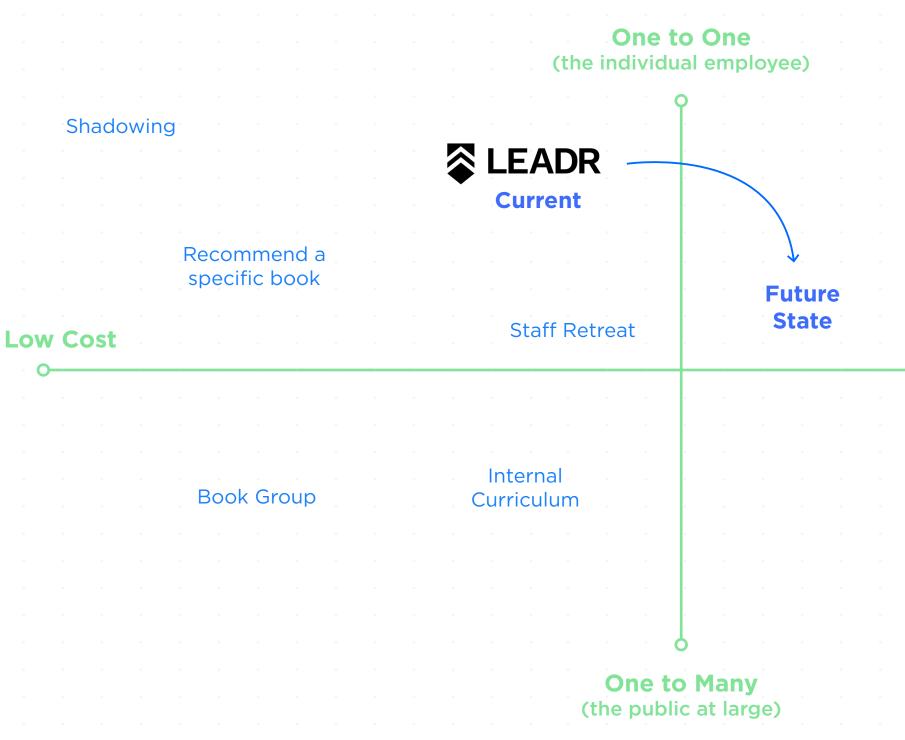
Peoplegoal: flexible, your way

15Five: Unlock the potential of your entire workforce. Continuous employee feedback/performance management made simple.



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#### Indirect Leadership Development Solutions



# Paid coach or mentor Consultant High Cost Conferences



# Positioning

The unique and defensible space you want to carve out in the mind of your customers and in the industry.

#### **Thought Starters**

Ó

**Humanizing HR:** What if we focused on the people, the front-line employees. HR = heart rate or the pulse of an organization. Could we make this relational rather than transactional?

**Coaching:** What would it take to make every manager a coach, rather than a boss?

**Culture Shift:** Could HR Software transform the culture of an organization?

**Continuous Improvement:** Can we align with the continuous improvement process (a very familiar process improvement methodology which has not yet made it into the HR space)

**Next Generation:** What types of HR software and employee/manager interactions will define the next wave of the workplace?











#### POSITIONING

#### 7/23

- Where leaders go to grow
- The best/most/proven way to develop high performing teams
- The best/most/proven way to develop the next generation of leaders
- Succession planning from day one
- Meaningful/effective conversations with every employee
- HR software built on Biblical principles, translated into the marketplace

### 7/26

- HR with a heartbeat
- Turning every manager into a coach
- The next generation of HR software
- Continuous growth for every employee
- Holistic continuous improvement
- HR software built on continuous improvement principles (Kaizen)
- Effective coaching for every employee
- On the path to progress
- Every manager a coach. Every employee a voice

#### 8/14

 Next generation people management software

• Next generation HR software build to continuously listen and progressively grow every employee

• Be the perpetual catalyst

• Every manager a coach. Every employee a voice

• Better every day



POSITIONING

# Leadership Development Software. Since leadership

Since leadership development software a defined arena, we wil attempt to own this as positioning within peop management software.

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### **BRAND FRAMEWORK**

# Promise

The something bigger you stand for. Often internal facing. Ideally stays the same even as the company grows.

# **Thought Starters**

**Inspirational & Compelling PLUS Tangible & Credible** 

- Meaningful conversations with every employee
- Effective coaching for every employee
- On the path to progress
- Every employee a voice
- Find something that resonates today and applies to HR



| Svery manager a coach.<br>Very employee a voice.  |  |
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| This promise statement is both<br>inspirational and compelling. It also<br>provides direction towards building a<br>tangible and credible solution to back<br>up the promise. |  |



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# of Managers

## anager

# nce Director



### PERSONAS

# Persona #1 Organizational Leader

## Bio

- Manager of managers, seasoned, experienced leader
- Feels out of touch and out of time.
- May lead from one level removed. Executive level. May have no direct supervisor.
- Typically a visionary, not detail oriented.
- Wants their voice heard across the organization.
- Sees their role as casting vision and instilling purpose.

# **Trigger Points**

- organization.
- not sure why.

- documented anywhere.

• I'm a manager of managers and our company recently started surveying employee and customer satisfaction. Both sets of scores are coming back lacking. I know something needs to change in the way I am influencing across multiple levels of the

• Just lost another good person, too much turnover. We can't seem to keep our best people and I'm

 Attracting and retaining top talent is crucial to the success of my business. I need to outshine my competitors in this area, it's my only chance.

 We grew quickly and almost overnight lost our identity and cultural standards. When we tried to hold people accountable, we realized we didn't have these standards clearly articulated or



# Persona #2 New/Entry Level Manager

## Bio

- Young, new or entry-level manager of employees or volunteers
- Feels underprepared and intimidated.
- Has personal performance objectives to balance with responsibility to develop others.
- While they may understand the principles of leadership, putting it into practice in real-life scenarios proves challenging.
- Although they may never express it vocally, they are looking for a 'guardrails for new leaders' type tool

# **Trigger Points**

- look up to me now.

- promotion.

 Just promoted (or increased in responsibility) and I've never managed at this level before. People

• Just started a new role and I want to make good impression, build morale with team, and create a culture of engagement. It's hard to get new routines in place after you've been at a role too long, best to start them at the outset.

• I'm not a manager yet but I'm on the growth track and it's my primary career ambition right now. I want to be prepared before they give me the



## Bio

- Feels too far removed with little control.
- Responsible for employee well-being and organizational health, but little direct 1:1 employee contact.

Persona #3

Finance/ HR Director

- Got into HR to make a difference, has high empathy. But now stuck dealing with organizational problems and compliance.
- Wants to spend more time proactively helping people, rather than reacting to issues, doing paperwork and conducting exit interviews.
- Typically, a church or organization will hire an HR director around ~50 staff

# **Trigger Points**

- not sure why.
- levels of the organization.

• Just lost another good person, too much turnover. We can't seem to keep our best people and I'm

 Our company recently started surveying employee and customer satisfaction. Both sets of scores are coming back lacking. I know something needs to change in the way I am influencing across multiple

• We just had another terrible staff meeting. I know we have a communication problem, but I don't know how to fix it. It's really hurting the culture.

• Reviewing the annual budget and we spend a lot of money on conferences. What return do we get on those? Is there another option?



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| <ul> <li>Highly practiced</li> </ul>                    |      |    |     |     |  |  |
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| Invested  |      |    |     |     |  |  |
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| Determined  |      |    |     |     |  |  |
| <ul> <li>Focused</li> </ul>                             |      |    |     |     |  |  |
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| Taking you on a simple p                                | atl  | h  |     |     |  |  |
| Empowering  |      |    |     |     |  |  |
| <ul> <li>Articulate &amp; easy to understand</li> </ul> | k    |    |     |     |  |  |
| • Practical, tactical, tangible                         |      |    |     |     |  |  |
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# We are not...

The hero or the center of the story

Shortcutting the process • We won't drop you off in a helicopter at your destination

Boring or Stale

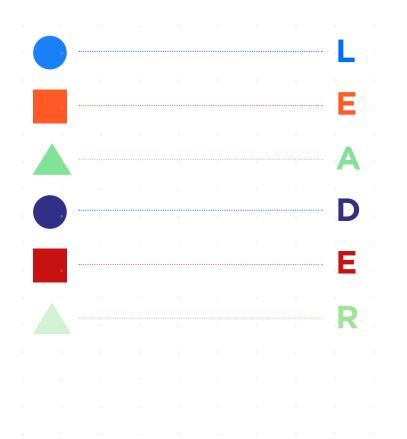




PERSONALITY

# Archetype

We interact with our customers as a... **Translator Guide** 



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or Guide, we do not carry the nply carry the meaning to the

ion, we walk side by side with the the jungles, down the river and onto

ighly practiced, we know the route know the native language. Acting as ruct as we go - this is the way, walk in

may confront us, determination nd, and a focused vision settles is a great prize ahead, a people ing to hear a message.

who hear marvel. Not at our abilities, he message was made so clear.



| BRAND PROMISE  |  | PERSONAS   |
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|  | nanager a coach.<br>Employee a voice.                                |  |
| POSITIONING<br>Leadership<br>Development<br>Software | BRAND ARENA<br>People Management → HR Software<br>Software           | <ul> <li>Manager of Managers</li> <li>Feels out of touch<br/>and out of time.</li> <li>May lead from one<br/>level removed.<br/>May have no direct</li> <li>Young/</li> <li>Feels<br/>and i</li> <li>Has perfection</li> </ul> |
|  | NG & PROMISE BY DELIVERING   | supervisor. respo<br>deve  |
| Whole<br>Employee<br>Growth                          | Powered by:PersonalizingCustomizingMeasuringCoachingLearningProgress | <i>We are:</i> The Seasoned<br>Coach but not<br>the hero   |

Across the board, organizations are not developing leaders fast enough. The systems, tools and frameworks used in the workplace to manage people are broken, resulting in piecemeal solutions, one-off assessments, temporary leadership fads, perks instead of progress and a failure to prioritize the individual front-line employee. And yet, what if continuous growth for every employee was possible? What could you accomplish? We believe it is and we're building the next generation of HR software to help you implement it. Every employee progressing. Every manager a coach. It's time for a new way to manage our most valuable asset. Leadr HR: every day leadership development. SHORT STORY <150 CHARACTERS

People management software built to turn any manager into a coach. Gather feedback, deliver learning and progressively grow every employee.

### ARCHETYPE

As the Translator Guide, we do not carry the message, we simply carry the meaning to the message.

### SAMPLE TAGLINE Leadr HR: every day leadership development.



**g/New Manager** els underprepared d intimidated. s personal formance objectives palance with ponsibility to velop others.



### **HR or Finance Director**

- Feels too far removed with little control.
- Responsible for employee well-being and organizational health, but little direct 1:1 employee contact.

Invested but not shortcutting the process *Taking you on a Simple Path but not boring or stale* 

### EDITORIALLY

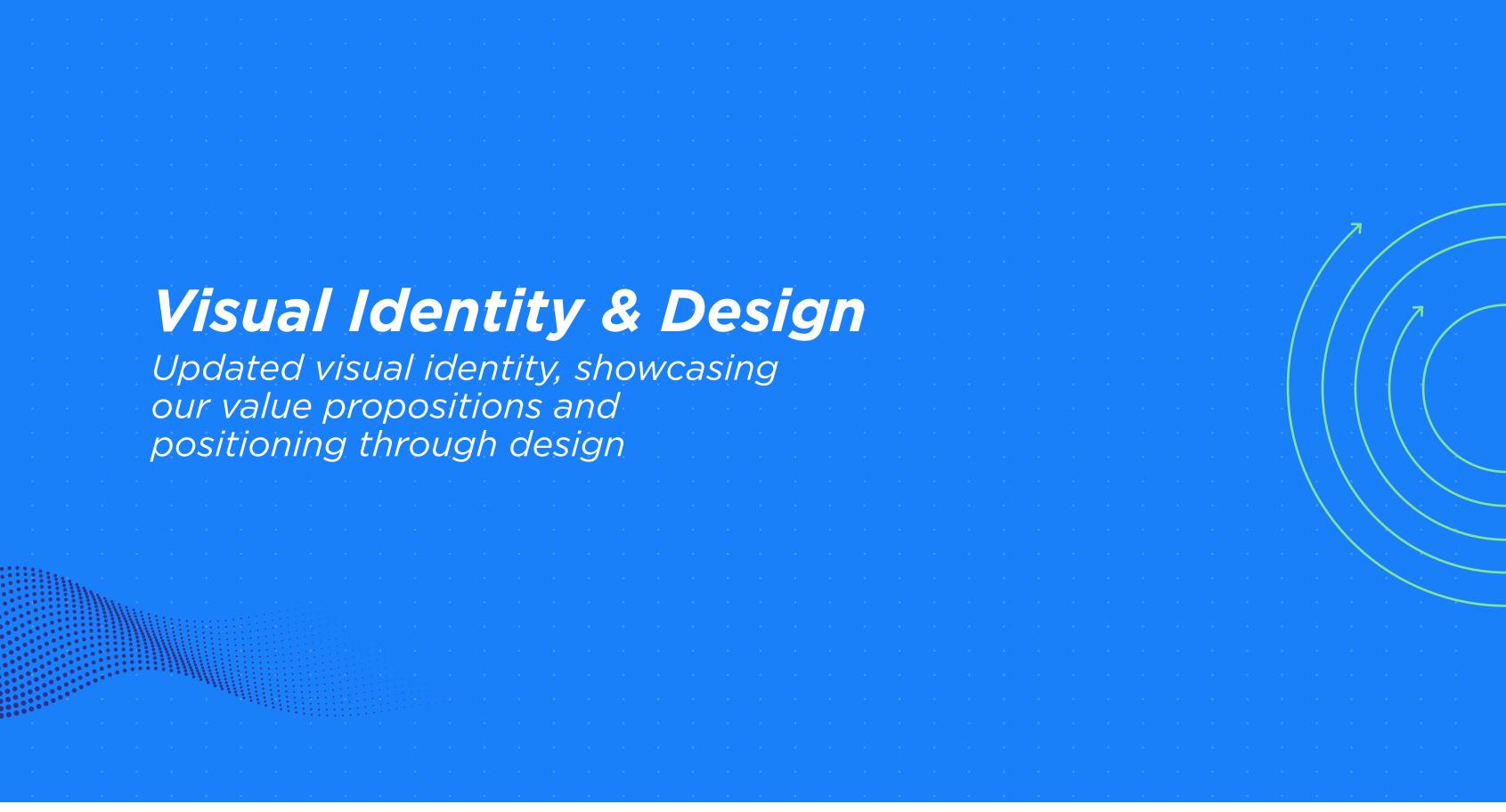
### We are:

**1. Articulate & Easy to Understand.** Inspiring hope that greatness is possible.

2. Supported by at least one piece of data, visualized when possible.

3. With at least one **practical leave behind** or clear next step.





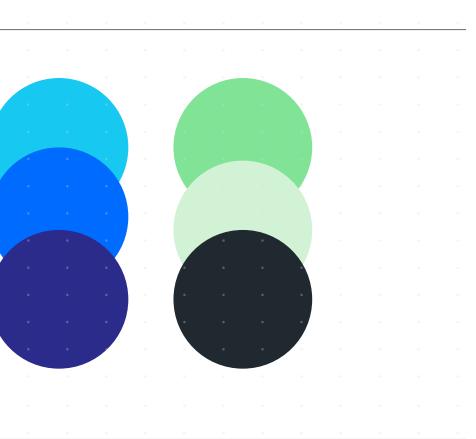


| VISUAL IDENTITY & DESIGN  | ·       · |
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| Graphics &<br>Shapes  |   |
| Shapes  |   |
| Fluid graphics representing continuous progress and                       |   |
| <i>improvement.<br/>Dot repetition and<br/>circles to represent small</i> |   |
| improvement everyday.<br>Echoes data visualisation.                       |   |
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|  |                      | topresent themselves."<br>says CCL's Cynthia McCauley.<br>"You can – and should – be proactive and<br>seek them out."   |
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Section 1

Assesment

### **Assesment:**

Define standards

• Establish baseline

### At a Glance

Right from the beginning, we need to stop and define your organization's standards. Why? Because in order to lead effectively, you must have a destination.To say to your team, "More, less, better or increased," naturally begs the response, "Of what, and according to who?" In essence they are asking you for clarity on how to hit the target. These standards will be the measurement categories you'll be using to track the growth progress of your team. We view standards in two primary categories:

### 1. Capability

2. Culture

### What is it? Key Definitions

Capability standards: The tangible and tactical skills needed to accomplish the items on your to-do list. These are often unique to each role, however some can be shared across an entire department or organization.

### **Cultural standards**

Cultural standards: The way or how in which you operate. The non-negotiable standards of practice for your employees. Think of these as virtues, characteristics and the more intangible qualities of how each person conducts themselves.

### Assessments:

Assessments: A way to measure proficiency in a subject. Capability standard assessments are easier to measure (For example, take this test of your knowledge on powerpoint) while cultural standard assessments require more reflection and nuance (For example, on a scale of 1-10 how humble are you?).

### Why are standards and assessments important?

Before you can measure growth or create a path toward progress; you first and foremost must know where you are currently. We call this establishing the baseline. You'll want to do this for every member of your team, including yourself.

It is impossible to establish a baseline, however, until we have defined both our cultural and capability standards. Without these, we have nothing to measure against. In other words, without clear and defined boundary lines, it becomes hard for players to play the game or location are playing well. know if they are playing well.





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|     | Section 3                                  |  |
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|     | Learning                                   |  |
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|     | attended to with diligence." Ablgail Adams |  |
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## **Deliver Learning:**

Section 3

### Key Tasks

- Create a catalog of learning content
- Determine the channels you will use to deliver learning
- Pick the tool(s) to help you manage the learning process

### At a Glance

At this point, you've laid a solid foundation by defining your culture Even though the initial assessments and capability standards, using assessments to identify your baseline your ears open and encourage and areas for progress, and set up real dialogue with each employee. a system for gathering continuous feedback from every level of your organization. We now begin the process of helping your team bridge the gap between their baseline and their potential by delivering customized learning.

Let's refer back to our Path to Progress for a quick reminder of where we're at:

......

Deliver Learning | Introduction

Determine standards

### Establish baseline

- Assess and gather feedback
- Deliver customized learning • Apply coaching as they put the
- learning into practice
- Track progress and reassess
- Adjust plan according to results

are over, don't forget to keep Do they have a preferred way to consume content? Are they enjoying the type of learning content? Is it hitting home? Are they feeling encouraged or is it leaving them frustrated? How are they balancing new learning objectives with their existing list of to-dos?

Meaningful conversations will keep the path to progress moving forward. Stop talking and it increases the chance for surprise delays, discouragement and resentment.

35





Thank You.

