Leadership in Research Workshop

Monday, June 12, 2017

Denver, CO
Introduction, Course Objectives, & Agenda
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Determining the Research Function’s Role within an Organization
Determining the Research Function’s Role in the Organization

Leadership in Research Workshop
Developing and Managing a Research Operation
June 12-13, 2017
Mark Troppe, CREC
Andrew Rogers, Skyland Workforce Center, DC
Question

• What are some questions about the role of the research function that you’d like to address in the next hour?
Key Take-Aways

• Don’t assume anyone knows what you do or how you do it
• Know your audience(s) and their interests/needs
• Tailor your message to the audience
• Lead with the “compelling why”

• “If we build the best mousetrap, the world will beat a path to our door.”
Four elements

• Vision/Mission
• Culture
• Customers
• Value Proposition
Vision/Mission

• Two levels to consider in defining role
  • Broader agency/organizational mission
  • Role that research plays in achieving that mission
  • Your organization/function in context of agency mission

• Important to have a good mission, vision, values statements.

• How you communicate that to others is critical...
Vision/Mission Discussion

• Do you have vision and mission statements? Are they communicated internally and externally? If so, how?

• What makes a good one?
SHRM Definitions

• Each statement—a mission statement, a vision statement and a values statement—has its own distinct function.

• A mission statement explains the organization’s reason for existence. It describes the organization, what it does, and its overall intention. The mission statement supports the vision and communicates purpose and direction to employees, customers, vendors and other stakeholders. The mission can change to reflect organizational priorities and methods to accomplish its vision.

• A vision statement describes the organization as it would appear in a future successful state. When developing a vision statement, ask: If the organization were to achieve all of its strategic goals, what would it look like 10 years from now? An effective vision statement is inspirational and aspirational, and creates a mental image of the desired future state.

Minnesota DEED

We've Got Your Number

Nothing tells a story like numbers. And here is where we let them do the talking. Our data and data tools provide a comprehensive, nuts-and-bolts look at Minnesota's economy and workforce.

https://mn.gov/deed/data/
Research Services

Business Intelligence Store

Make better business decisions with research assistance from the Greater Memphis Chamber. Our business intelligence products include demographics, membership databases, maps, community information, and research consulting.

For more information, see below for information on our products, contact our Research Department at 901-543-3500 or by sending an email to info@memphischamber.com. Free Memphis information is also available on the Chamber’s Data Center page and in the Map Gallery.

Quick Links:
- Demographic Reports
- Relocation Assistance
- Member Data Packages
- Chamber Business Lists
- Pricing Guide

Demographic Reports

Up-to-date population statistics are available to Chamber members for all geographies types in the United States plus radius and drive time reports. The detail report includes the following data points:

- Population
- Employment
- Marital status
- Race/ethnicity
- Number of businesses
- Educational attainment
- Age
- Housing units
- Gender
- Household income and size
- Vehicles available
- Tenure (Own vs. Rent)
Greater Memphis Chamber
Welcome to the Labor Statistics section of the New York State Department of Labor's web site. We are the premier source of labor market information in the state. From wages to projections to the latest job figures, the Department of Labor has the most current and accurate labor market information available.

https://labor.ny.gov/stats/
Can’t just say you are premier... you have to deliver good products!
Culture (HBR view)

- While there is universal agreement that (1) it exists, and (2) that it plays a crucial role in shaping behavior in organizations, there is little consensus on what organizational culture actually is, never mind how it influences behavior and whether it is something leaders can change.
- “Culture is how organizations ‘do things’.” — Robbie Katanga
- “In large part, culture is a product of compensation.” — Alec Haverstick -- shaped by incentives.
- “Organizational culture defines a jointly shared description of an organization from within.” — Bruce Perron
- “Organizational culture is the sum of values and rituals which serve as ‘glue’ to integrate the members of the organization.” — Richard Perrin
- “Organizational culture is civilization in the workplace.” — Alan Adler
- “Culture is the organization’s immune system.” — Michael Watkins
- “How the organization behaves when the boss is not there.”

https://hbr.org/2013/05/what-is-organizational-culture
Culture Discussion

• What makes your research function different from other components of your organization?
• How do the people you hire to do that work differ from others in the organization?
• What do those differences suggest about how to work together, how to earn their attention and respect?
Research Customers

• Internal
  • Leadership
  • Other departments

• External
  • General public
  • Policymakers
  • Media
  • Contributors (dues-paying members, fee-for-service clients)
Value Proposition Discussion

• How would you describe your role in the organization? How is it conveyed within your organization? To outsiders? How did you determine it? Agreement and disagreement areas?

• How integral is research to the success of your organization? Why?
What’s a Business Model?

A business model describes how a company creates, delivers and captures value.
The Business Model Canvas

Business Model Generation
Alexander Osterwalder and Yves Pigneur
Value Proposition

What Are You Building and For Whom?
Why do they care?
What problem you are solving?

*Not what you sell, but why: the benefit provided
Value Proposition

• We provide__________ to __________so that they can ______________________

• Not what you sell (features) but why you included them

• “….faster internet speeds….so that you can work and shop from home”
Activating the Research Component of the Organization’s Strategic Plan

- Building a Dynamic Product & Services Portfolio
- Make Versus Buy Options
Building a Dynamic Product and Services Portfolio

• What can you offer?
  ▪ Who are your customers and what do they need/want?
    ▪ Regular reports, rapid prospect response, BIG initiative support and leadership, time-sucking ad hoc requests, etc.
  ▪ What are similar research teams doing?
  ▪ Which things are highest priority?

• Flexible Flyer?
  ▪ Can you easily adjust to changing needs?
  ▪ Cross-training
  ▪ Staffing vs. Tool Mix
Do You
Make vs. Buy?

- **Make**
  - Slower Process
  - Higher Quality, More Current
  - Staff training/transition
  - Hidden costs

- **Buy**
  - Quick response
  - Mixed Quality
  - Less People -> Buy More
  - Explicit cost
  - Outsource a Major Research Project? Outsider advantage
Team Discussion
Pick a Conversation Starter...

• New boss ask “What 2 things does your team do best?”
  What do you say and why?

• Bad experience trying to prioritize a customer’s need?
  What did you learn?

• Your best Buy vs. Make decision and tip you would tell others
Break!
Research Budgeting
Know Your Business

- Tracking, Tracking, Tracking
  - Usage per project
  - Usage per landed project
  - Publications used to attract leads
- Substantiating Cost and Value
  - No. of RFIs needing information
  - New leads from source
- Evaluate Annually
- Comparing Products

Total Projects Landed Using X Source

CRM -1200+ requests
PROTECTING YOUR BUDGET – TRACKING - POOR MAN

Information Services Tracking Entry Form

1654  PCS Project: Diamond  Major Category: PCS Projects  Date: 1/10/2012
Project Manager: Brenda Robbins  Requestor: Economic Development
Short Description: big project
Details: big project

Team
- Zeller
- Ussery
- Flournoy

Notes
1/26/2012  Provided Metro Atlanta occupational cluster maps for Business and Finance, computer and math by residence as well as Top IT firms by place of business. Provided metro Atlanta top IT firms map as well as new prospect presentation and drive time maps and demographics.

5/11/2012  Provided map of metro Atlanta IT occupations.

3/1/2013  Provided workforce analysis and presentation.

Resources
- EMSI
- ESRI
- Business Wise
- Hoovers
- CareerBuilder
Lunch!

Organized by the LMI Institute.
AGENDA: Afternoon

1:00 – 2:30
• Building a Research Team

2:30 – 2:45
• Customers & Their Needs

2:45 – 3:15
• Break (refreshments provided)

3:15 – 3:45
• Customers & Their Needs (continued)

3:45 – 4:30
• Open Discussion & Wrap-Up

4:30
• Adjourn
Building a Research Team
Building a Research Team:
Common traps & how to deal

• Difficult employees
  • Performance
  • Good fit
  • “Legacy” employees
• Recruiting
  • Skills are important but establish your “permission to play”
• Keeping employees engaged
  • Know you may lose the best, and be ok with it
  • Create pipelines
  • Create opportunities- go beyond cross-training
Group Discussion

Think of a time when you have worked with one (or more) of the employees below. How was the situation handled? How did it impact the team? What would you do differently now?

1) Rufus is so difficult to work with, but...
   He is the only one who knows how to do it.

2) Vernon is the perfect candidate on paper, but...
   But he seems like he might be hard to work with.

3) Fannie is wonderful, but...
   I just know she is going to leave us soon.

4) Tom Jack is so easy to get along with but...
   I just can’t depend on his work.
Customers & Their Needs

• Identifying Customers
• Communicating Your Research Products
Customer Segments

Who Are They? What Are Their Needs? What Are Their Behaviors? What Are the Demographics?
Value proposition must fit the customer’s needs

What you provide

- Products & Services
- Gain Creators
- Pain Relievers

What they need

- Gains
- Pains

Value Proposition Map

Customer Profile
CUSTOMER PERSONA/ARCHETYPES

WHO ARE YOU?

HOW DO YOU BUY?

WHO INFLUENCES YOU?

PROFILE

- POSITION/TITLE
- AGE/SEX
- ROLE
- DISCRETIONARY BUDGET
- MOTIVATIONS
- ROLE MODELS
• Why they are targeted?
• What problem or need are you trying to address?
• What are their current behaviors (what products or services do they use)?
• What are the Pains / Gains?
• Does the pain/gain get customers VERY excited?
• Or, needs to be stronger, more unique? How?
• Are there any barriers?
Open Discussion & Wrap-up
Thank You!
Leadership in Research Workshop
Tuesday, June 13, 2017
Denver, CO
Regroup & Agenda
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<td>8:00 – 8:15</td>
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<td>8:15 – 9:30</td>
<td>Balancing Leadership &amp; Administrative Management</td>
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<td>9:30 – 10:15</td>
<td>Managing Work Flow</td>
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<td>Break</td>
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<td>10:30 – 11:00</td>
<td>Collaborating with Outside Partners</td>
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<td>Managing Transition &amp; Change</td>
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<td>11:30 – 12:00</td>
<td>Open Discussion &amp; Wrap-Up</td>
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Balancing Leadership & Administrative Management
Balancing Leadership & Administrative Management:

Differences between

**BOSS**
- Drives employees
- Depends on authority
- Inspires fear
- Says “I”
- Places blame for the breakdown
- Knows how it’s done
- Uses people
- Takes credit
- Commands
- Says “Go!”

**LEADER**
- Coaches employees
- Depends on goodwill
- Generates enthusiasm
- Says “we”
- Fixes the breakdown
- Shows how it’s done
- Develops people
- Gives credit
- Asks
- Says “Let’s go!”

3 Signs of a Miserable Job
- Irrelevance
- Immeasurement
- Anonymity
• **Personal Leadership Style**
  • Why do you want to be a manager/leader?
  • Recognize your strengths and weaknesses & balance them
    • May use communication style, other team members, structure, etc.

• **Effective Management Style**
  • Find a framework that works for you
    • Be intentional about workflow, delegation and communication
    • Flexibility- not all people and situations are managed the same way
    • Empower & equip team to make decisions they need to

• **Motivation, Morale, & Mobility**
  • Set clear expectations (this is hard)
    • Consistent accountability & discipline (this is harder)
      • Yes, I said discipline
    • Engage other leaders or champions
    • Use training & organization structure to facilitate and reinforce

“People need to be reminded more often than instructed.”
<table>
<thead>
<tr>
<th>Management Style</th>
<th>Effective Scenarios</th>
<th>Not Effective Scenarios</th>
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<tbody>
<tr>
<td>Directive</td>
<td>• Effective in crisis</td>
<td>• Not effective with underdeveloped or highly skilled employees</td>
</tr>
<tr>
<td>Authoritative</td>
<td>• Effective when clear direction and standards are needed</td>
<td>• Not effective when employees are underdeveloped</td>
</tr>
<tr>
<td>Affiliative</td>
<td>• Effective in managing conflict, routine tasks</td>
<td>• Not effective in crisis, when performance is inadequate</td>
</tr>
<tr>
<td>Participative</td>
<td>• Effective in steady working environment, good teamwork</td>
<td>• Not effective with underdeveloped employees or unmotivated employees</td>
</tr>
<tr>
<td>Pacesetting</td>
<td>• Effective when little direction is needed</td>
<td>• Not effective with underdeveloped employees or unmotivated employees</td>
</tr>
<tr>
<td>Coaching</td>
<td>• Effective when skills need development, employees are motivated</td>
<td>• Not effective when leader lacks expertise, in crisis</td>
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Group Discussion: Pick 2-3 questions to discuss. Share common themes that emerge in your group. Does someone do something unique that the group had never considered before?

- How do you motivate your reports?
- How do you keep your reports meaningfully informed?
- How do you maintain your team's focus on specific goals?
- How do you set, clarify, and hold your reports accountable to your expectations?
- How do you recognize successful work?
Managing Work Flow
## Managing Work Flow

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<th>June</th>
<th>July</th>
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<tr>
<td>Project A</td>
<td>Data Entry</td>
<td>Analysis</td>
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<tr>
<td>Project B</td>
<td>Analysis</td>
<td>Analysis</td>
</tr>
<tr>
<td>Project C</td>
<td>Data Entry</td>
<td>Analysis</td>
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<td>Project F</td>
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<td>Project H</td>
<td>Data Entry</td>
<td>Analysis</td>
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<tr>
<td>Project I</td>
<td>CL</td>
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<tr>
<td>Project J</td>
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**Legend:**
- **Data Entry**: Blue
- **Analysis**: Orange
- **Client Review**: Pink
- **Rep ort**
Break!

www.surveymonkey.com/r/pct17
Collaborating with Outside Partners
Key Partnerships

Who Are Partners? What Type of Relationship Is Need (Formal/Informal)? What Value Do You Add? What Perspective Do They Bring? What Are Their Needs?
Different Perspectives
Different Perspectives
Motivations Behind Partnerships

• Optimization and economy of scale
• Reduction of risk and uncertainty
• Acquisition of particular resources and activities
• Expanding the pie

Types of Partnerships

• Strategic alliances
• Co-opetition
• Joint-Ventures
• Buyer-Supplier Relationships

Factors for Forming Partnerships

• Right Partnership Agreements
• Defining Expectations
• Impact on your clients
• Win-Win situation
• Which partnerships are critical to our business?
• What value do we add to a partnership?
• What type of partnerships would suit our needs?
• Which of partners can add value with key resources?
• Are their relationships that we have not considered?
Managing Transition & Change
Managing Transitions

William Bridges
Transitions is like a Marathon
Marathon Effect
In Summary... Phases of Transition

**Ending**
- Letting go
- Getting closure
- Saying good-bye

**Neutral Zone**
- In-between time
- Confusion
- Clean slate

**New Beginning**
- Renewal
- Being “with it”
- The new chapter
Open Discussion & Wrap-up
Thank You!

www.surveymonkey.com/r/pct17