

Leadership Forum

What is a Leadership Forum?

The meetings structure in an organisation is usually based on departmental teams. Typically the Executive Team hold meetings as a group and then individually hold Team Meetings with their next tier managers along functional lines. Many organisations have some form of meeting or conference for the top three tiers as a whole at less frequent intervals. Experience suggests the effectiveness of this can be variable.

Leadership Forum is UIMPROVE terminology for putting some structure to this meeting and setting up an annual programme of regular, as opposed to random, activity. This provides the opportunity to hear and develop common messages, do work together, prevent silo working and to develop a consistent approach to leading and running the organisation.

Who should attend?

- The Corporate Brain - Managing Director or Chief Executive + Direct Reports
- The Next Tier Down - all Direct Reports to the above
- Any other leaders of large teams or key organisational players but no hangers on

The thinking behind and purpose of a Leadership Forum

- It gives the Chief Executive direct access to the Next Tier Down - a level they would normally only have limited direct access to
- It allows the Corporate Brain to collectively interact with the Next Tier Down
- It is an opportunity to develop alignment and consistency of an organisation's leaders - it brings together the senior leaders in one group so that everybody hears and participates in the development of one message and approach
- It is a structural way of living the message of inter-departmental cooperation
- It is not about departmental presentations, nor is it a roadshow, it is a participative way to explore key issues for the organisation
- It should be integrated into the Annual Corporate Planning Process
- Responsibility for the quality of leadership in an organisation lies at the top. A Leadership Forum is a means of reinforcing this.

Typical topics

An effective Leadership Forum has an annual programme of activity (linked to the Annual Corporate Planning Process). There is strength in predictability and repetition.

- **Leader Speaks**
The tone and content of this session are notably different to a Leader Speaks at, for example, an Executive Event. This is because the majority of participants at a Leadership Forum do not work directly for the Chief Executive. Therefore it is important that the contents do not short-circuit the reporting lines. However it is important that the boss gets to address the whole leadership population in one go at regular intervals.
- **Strategy Development (annual)**
This provides the opportunity to brief in the work already carried out by the Executive Team. The Next Tier Down can then add their thoughts and contributions, consider the consequences for their part of the organisation and begin to think about how the strategies will be delivered.
- **Project Steering Grid share**
What projects are being worked on at corporate, departmental and team level.
- **Team Perspectives and Interchange exercises**
This is UIMPROVE jargon for exercises where each team shares key facts including what it is working on followed by the opportunity for other teams to ask questions.
- **Briefings on corporate and major projects**
- **Topics of organisational importance**
- **Customer Survey planning and review**
It is this group that should be the true owners of the Customer Survey, they and their teams are closer to the customer, will be better informed about the detail of any issues raised, and should be identifying areas for further investigation and well as prioritising and setting up departmental and team projects to improve customer satisfaction.
- **Staff Survey planning and review**
This group should also be the true owners of the Staff Survey, the reasons being the same as for the Customer Survey. They are the group with their ear to the ground on a daily basis, are responsible for setting out expectations of the way their managers manage and setting the tone of day-to-day life in their department.
- **Briefings on reorganisations and key people changes**
Leadership Forum plays a key role in the implementation of and briefing in reorganisations.
- **External speakers (occasional)**

Topics to avoid

- **Real Work**
Leadership Forum is not the best place to do Real Work as the group is too diverse for specific topics. A possible exception might be very high level scoping of corporate projects.
- **'Team building' activities**
The members of Leadership Forum are not a team. This is the only place they should be meeting as a group and therefore team development is a waste of time and effort.



Frequency and duration

- Three or four times per year
- Additional meetings can be held when major change is occurring or for major issues and events
- A full day is best

The role of the UIC

The UIC has extensive experience of helping to set up and run the Leadership Forum in a wide variety of organisations, both large and small.

Firstly we meet with the leader of the organisation to identify current issues and priorities and then plan the structure of the day. We design each session and suggest suitable tools and techniques. On the day itself, we will facilitate, working closely with the leader. Afterwards, we'll sit down again and review the day.

Use your own Facilitators

If we have trained Facilitators in your organisation, we can provide additional training so that they can carry out this type of assignment for you through the Advanced Facilitator Development Programme.

Typical pitfalls

These are some practices we have encountered (none of these are made up):

- The group never meets
- The group meets too frequently (nothing purposeful to do)
- The group meets too infrequently (no continuity or momentum)
- Input on the day is dominated by either the Chief Executive or Executive Team
- Led by the Chief Executive instead of the Corporate Brain collectively
- Letting someone else take charge - usually someone from HR, strategy or similar
- No annual programme of activity resulting in a 'what can we put on the agenda this time?' approach
- No link to the Annual Corporate Planning Process
- Poor group composition - key individuals missing and/or too many hangers on
- Attendance is optional
- The Next Tier Down meets but the Directors don't attend (explained as empowerment in action)
- Thinking this is about engagement
- Calling that tier of management and/or the meeting something daft - you get what you call it
- No facilitation
- Facilitation by untrained (but enthusiastic) Facilitators resulting in suboptimal use of structure, techniques, remits etc. and therefore outcomes

