

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 develops 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 steer and lead on 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 improving this.

Typical topics

An effective Leadership Forum has an annual programme of topics (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.
- **Annual Strategy Briefing**
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.
- **Briefing in of and contribution at a high level to key developments and corporate projects**
- **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.
- **Review of Customer Survey results**
It is this group that should be the true owners of the Customer Survey, they and their Direct Reports 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.
- **Review of Staff Survey results**
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.
- **Reorganisations and changes in key people**
Leadership Forum plays a key role in the implementation of and briefing in reorganisations.
- **Interesting external speakers**
- **It can provide the first stage of the organisational team brief**

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.



Typical duration

Duration can be from half-a-day to a whole day depending on what needs to be done.

Frequency

- Suggested frequency is every 3 or 4 months
- Additional meetings can be held when major change is occurring
- One meeting per year should be devoted to Strategy Briefing
- There is an option for an annual overnight meeting as part of the programme

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 sit down 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 infrequently
- Infrequency means people use the Leadership Forum to air dirty laundry or vent rather than move the organisation forward
- The group meets too frequently and therefore has nothing purposeful to do
- No facilitation
- Facilitation by (enthusiastic) Facilitators not trained to carry out this assignment resulting in overuse of Cocktail Party and sub-optimum remit and structure
- No annual programme of activity resulting in a 'what can we put on the agenda this time?' approach
- Too many hangers on, particularly headquarters and HR types
- The Next Tier Down meets but the Directors don't attend (explained as empowerment in action)
- The meeting has a silly or non-descriptive name (you get what you call them/it). If you want to know why UIMPROVE uses the term Leadership Forum, read the Yearbook article referenced below.
- Led by the Chief Executive, not the Corporate Brain as a collective
- Not led by either the Chief Executive or the Corporate Brain. Instead someone else takes charge - usually someone from HR, 'strategy' or similar.
- No link to the Annual Corporate Planning Process
- Thinking this is about engagement



Further reading

- (1) The Complete Guide to Leadership, page 16.6
(Version 11)
- (2) Leader Speaks Guidelines - Leadership Forum
(available on-line to Universal Leadership Skills graduates)
- (3) UIC Yearbook 2015, pages 20-21

