

# How to MANAGE LIKE A PRO

100+  
TIPS  
FROM THE  
EXPERTS



*BCBusiness* magazine shares  
**expert advice** on being a better boss,  
from hiring to firing + more

BY THE EDITORS OF *BCBUSINESS*

ILLUSTRATIONS BY VICTORIA PARK

CHAPTER 1

# Culture





# A Question of Balance

Managers can set off-work boundaries as a way to build office culture. Georg Reuter, partner at law firm Richards Buell Sutton LLP, and Jen Wetherow, senior director of workplace consulting and training firm Great Place to Work Canada, explain where to start *by Jenny Peng*



## 1 WALK THE TALK

Wetherow says Great Place to Work encourages its clients to model the behaviour they want to see. For instance, Elana Rosenfeld, CEO of Kicking Horse Coffee, publicly states that she doesn't want anyone working more than 40 hours per week. "Management can't extol the virtues of work-life balance if the entire management team is sitting at their desk on any given Tuesday night at seven," Wetherow says. "They have to role model the behaviour they want to see, which is, 'Get in, do your best, and go home.'"

## 2 CONSIDER THEIR LEVEL

An employee's off-work responsibilities should vary according to their job level, Reuter explains. Some more senior employees might be expected to monitor their phone and emails when they are out of the office. "It's important to let people know what your expectations are and if your expectation is for people to monitor their email and respond." Employers often don't realize that employees (except management and unionized workers) are entitled to claim overtime wages according to the Employment Standards Act.

## 5 LET IT GO

The best workplaces don't have stated policies around flexible work arrangements, Wetherow says. Rather, she argues, they create an atmosphere of mutual trust. This benefits both sides. "Managers who trust their employees allow them to be risk-takers and innovators, and allow ideas to bubble up from all levels of the company. In the best workplaces, we see organized management that really go to great lengths to ignite passion in their employees."



## 4 GET CREATIVE

Setting off-hours boundaries can be a way for employers to send a message about company culture. One company considered a great place to work is plant-based-nutrition specialist Vega, says Wetherow. There, management supports women in the workforce by empowering men to take an active parenting role. Parental leave top-up is available for mothers and fathers, as is flexible scheduling, allowing employees to come in early or work remotely.

## 3 INK IT

Reuter recommends having clear policies that make it easier to advise employees when certain conduct crosses the line. "This will inform decisions about the consequence," such as how a worker should be disciplined and in some cases terminated for breaching the employer's policy, he says. The four types of policies employers should consider putting on paper: social media conduct, mobile device use, overtime pay and intellectual property rights. The latter, especially crucial for the high-tech sector, should specify if inventive work outside office hours belongs to the person or employer.



# Cultural Ties

Stephen Shen, chief technology officer of MuseFind Technologies Inc., a Vancouver-headquartered developer of influencer marketing software, and workplace culture consultant Lorie Corcuera, CEO of Spark Creations and Co. Inc., also in Vancouver, discuss how to build an effective startup culture *by Felicity Stone*



## 1 DEFINE WHAT YOU STAND FOR

Look at the company's values and the image you want to reflect, Shen says. "Start with the founders sitting down and figuring out what that looks like," he advises. "Your core values are what's most important to you as the founder or entrepreneur and your organization," Corcuera agrees. A company's values always start with the founder because that's who had the original idea and understood where the product or the service was going to go, she explains.

## 2 HIRE LIKE-MINDED PEOPLE

"Our recommendation, first steps first, is that pretty much your number one or second person you hire is someone who really can support you through your culture," Corcuera says. "For us, we want to promote thought leadership, we want to be the young, hip brand out there, and so that's the kind of people we want to attract onto our team," notes Shen. "To support that, we try to bring the team together. We always go back also to our mission and what we want to do."

## 5 DO A CULTURE REVIEW

"It's almost like a performance review, but it's for the whole company," Corcuera says. "You can do that quarterly or annually, but it's important to check to see how did we do—did we live our values?" MuseFind does an informal review. "We want to make sure everything still lines up with what we believe in," Shen says. "At the end of the year, every team would have a 360 review, so everybody goes around giving feedback and compliments and also revisits those values."



## 3 INSTILL THE CULTURE

As you bring on more people, the culture keeps evolving, Shen observes. "It's different for every company, because the individuals that come in, they all bring new values and new ways of doing things," he says. "But the core, of course, stays the same, so whoever joins one of our teams, we make sure we onboard them correctly and also align with those values going forward." Corcuera suggests creating "culture experience programs"—for example, an orientation process with activities that help new employees understand the company's values.

## 4 INVOLVE THE TEAM

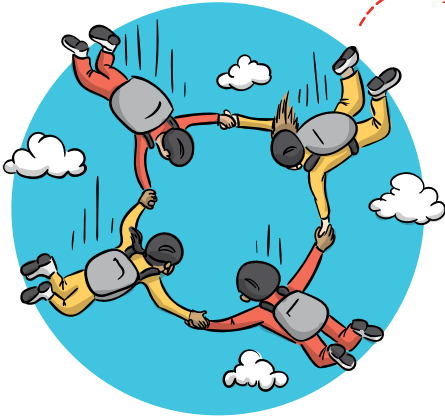
Keep the team empowered and involved, because ultimately the culture is for everyone, Shen advises. "It's not just the founders or the management who say, 'Hey, we're going to do this, like it or not,'" he notes. "Never force it on [people], because it will be artificial and will never stick." MuseFind has polls for employees in its Slack channels to help get people involved. "Everyone's always welcome to give an opinion, and we go from there," Shen says.





# Clear Objectives

There's much talk about corporate transparency, but what does it mean in practice? Chris Catliff, CEO of BlueShore Financial, and Andrea Soberg, associate professor and former dean of the Trinity Western University School of Business, clear the air *by Felicity Stone*



## 1 ESTABLISH TRUST

“Transparency breeds trust, which breeds engagement, which is your key to success—whether that engagement is with your clients or your business partners or your staff,” says Catliff. “No secret life for work or wife—it’s all out there. And then people forgive your faults because they see them at least consistently.” “The better organizations truly are transparent and honest—to their clients, to their employees, to their board,” says Soberg. “What makes them successful is that the leaders become trustworthy, due to their transparency.”

## 2 BE CLEAR

Clear systems and processes consistently applied let everyone know the rules of the game, from the company’s culture to corporate reports to the activities of the board, says Soberg. “There’s this consistency of language but also consistency of application.” For Catliff, strong, shared corporate values are equally important. “We explain our decisions in those values, and we don’t make decisions that are outside those values. One of them is 360-degree accountability, so we hold each other accountable, but I’m just as accountable to the staff as they are to me.”

## 5 KNOW YOUR LIMITS

Transparency doesn’t mean sharing everything, says Soberg. It should be clear, however, that established procedures have been followed without revealing confidential details. Catliff says everything needs to be transparent and authentic, with two exceptions. Management can speak about options, but musing about hypotheticals creates uncertainty, plus sometimes information critical to the business’s success must remain secret: for example, when BlueShore was rebranding from North Shore Credit Union. Staff were kept informed about the process but not the details until a week before the public announcement.



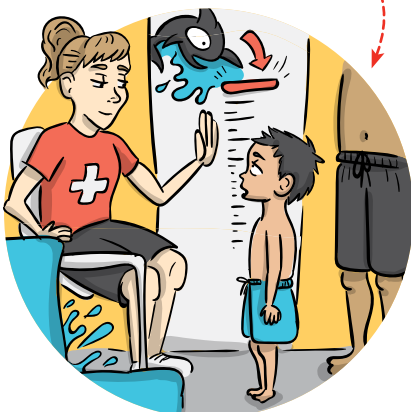
## 4 FOCUS ON WHY, NOT WHAT

Honesty and transparency help give employees a sense of purpose, but telling them why also allows them to figure out where they belong, says Catliff. Soberg agrees that employees need to see how their work fits into the organization’s mission. “Employees are participating in the organization’s success, and also in the development of policies and procedures that affect the work environment,” she says. “So it’s not just top down. A participative environment is created, which further creates transparency.”



## 3 KEEP COMMUNICATION LINES OPEN

It’s important to ask for feedback and listen to feedback, says Catliff. BlueShore employees can “connect with Chris,” anonymously if they prefer, via intranet and receive a response within 24 hours. It’s also important to “initiate brave dialogue” and not allow things to fester. “The worst thing that I can imagine is if an employee hears some bad news first in the newspaper or from a customer.” When rumours begin, says Soberg, transparency breaks down and you lose people’s trust.



# Culture Club

What goes into building a successful corporate culture? Matthew Handford, chief people officer at Coast Capital Savings, and Gervase Bushe, Beedie School of Business professor, offer some suggestions *by Felicity Stone*



## 1 DEFINE IT

You can't implement a culture, but you can try to shape it in a positive way, says Bushe, co-author of *Dialogic Organization Development*. Handford agrees that while you can devise an initial framework for the culture, it quickly gets organic and then you shift into shaping mode. Still, most award-winning cultures start with a strong set of values, what they stand for and hope to achieve, he says. "To me that's a critical kind of exercise, and I think that also informs the shaping of the organization."

## 2 TALK ABOUT IT

Most high-performance cultures are shaped constantly, consistently, intentionally and ideally at all levels, says Handford. "You need to build skills around discussing your own culture. It demystifies the topic and it helps you develop a clear and consistent understanding of core values and what sets your company culture potentially apart at all levels of the organization." According to Bushe, "To shape a culture you have to influence how people who talk to each other day-to-day make sense of organizational policies, procedures, decisions and actions."

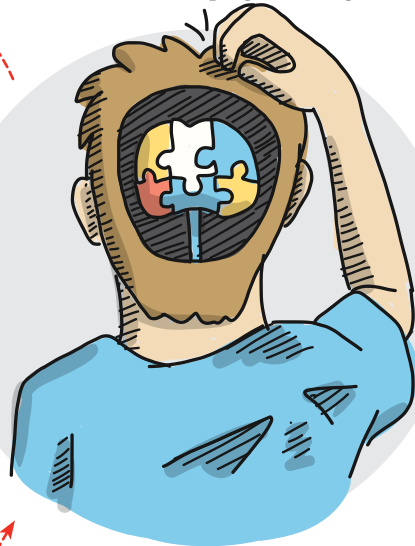


## 3 CONNECT IT

Develop a simple and clear line of sight that connects your unique cultural attributes to achieving business success, says Handford: What are you there for, what results are you trying to attain and how do you connect the culture to that at every level of the organization? Organizations move in the direction of the questions their leaders most frequently and passionately pose, says Bushe. "Engage those networks in answering questions that point toward the new culture you want, and provide opportunities for them to test your sincerity."

## 4 MAKE SENSE OF IT

Understand the networks of meaning-making in your organization and the current narratives (e.g., "Around here executives are just interested in their bonuses") people are using to make sense of you and the organization, says Bushe. "Changing those narratives is what changes a culture." People make sense of organizational decisions and actions by whether they align with their understanding of corporate values, says Handford. "It's pretty straightforward. You can't say one thing and deliver another."



## 5 BE PART OF IT

"The actions of leaders are the main lever organizations have for shaping culture. What you do sends a much louder signal than what you intend or what you say," says Bushe. Genuine participation within the culture by leadership is a big differentiator among highly respected corporate cultures, says Handford. "You can't fake that as a leader. Often in organizations I think that some of the leadership sits a little bit outside the culture; it feels like they're managing it."





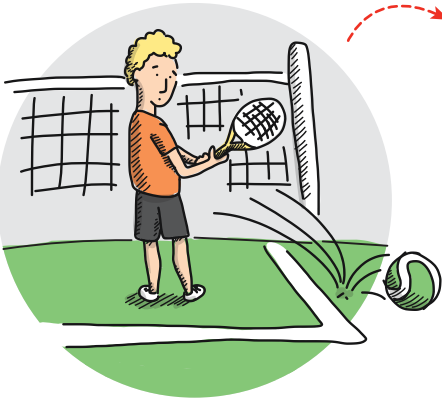
CHAPTER 2

# Workplace



# Let's Get Flexible!

Flex work is all the rage, but doing it right is tricky. Nina Rizzi, talent manager at sister agencies 6s Marketing and Drive Digital, and Craig Townsend, B.C.-based director of marketing in Canada for global workspace provider Regus, offer some tips *by Felicity Stone*



## 1 SET THE PARAMETERS

"This is not just a free-for-all where you can come into the office twice a week and then work from home and then get back to us on your schedule," says Craig Townsend. "There's still deadlines." Nina Rizzi adds: "Be honest with yourself about what your boundaries are. If you are not an organization that is going to let everybody work from home whenever they want, then put that out there. But make sure people know what you will offer, and make sure that people understand those boundaries."



## 2 SET WORKERS UP FOR SUCCESS

Whether it's a home-based office with all the technology and proper routers, or the necessary mobile devices and a laptop computer, give the employee all the tools that they need as opposed to just giving them a VPN [virtual private network] and then telling them, "Good luck at home," says Townsend. "That's not how that works."

## 5 BE BRAVE

Flex work can potentially cause problems, and you have to be willing to deal with them rather than just sticking your head in the sand or revoking the whole program, says Rizzi. "There are going to be people who abuse it, and you are going to have to have difficult conversations. If you're not prepared to do that, then you're essentially penalizing everybody and affecting your ability to attract and retain the type of talent that you probably want to."



## 4 KEEP IN TOUCH

Scheduled daily and weekly check-ins via conference calls, Skype or FaceTime are critical, says Townsend, but meeting in person is also important to build relationships and maintain morale. "There's a big gap still between a face-to-face meeting and FaceTime," he says. "You really want to bring them in for a hug, if you will, and let them know that they're still a critical part of the team."



## 3 EMBRACE TECHNOLOGY

As well as Skype and FaceTime, Regus increasingly relies on text messaging because it is more immediate and everyone has devices at hand. "If an email server goes down, you don't have to worry about sending an email message," says Townsend. Or, depending on your location, your cellphone signal might not be great for FaceTime whereas text messaging is up 99 per cent of the time.





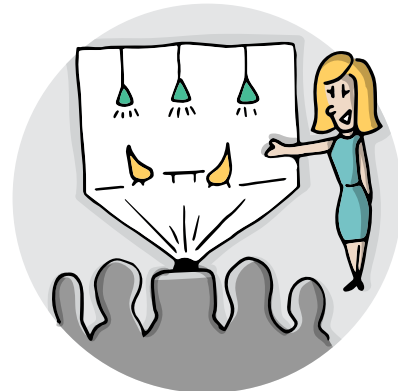
# Tear Down Those Walls

How do you get employee buy-in for a move from a traditional to open-plan office? We asked Tracie Crook, COO of McCarthy Tétrault LLP, which is moving to a more open arrangement, and Omicron's director of design operations Alan Hancock, who regularly helps his clients transition to open plan environments *by Felicity Stone*



## 1 BEGIN THE CONVERSATION

A year before starting to build, “we started with a workplace study program,” says Crook. “We met with a number of individuals across the firm to find out how they work today, how they want to work in the future—and then that was the building block for our new space.” But be prepared to act upon employees’ feedback, says Hancock. “If staff are being consulted but then they see nothing that they requested implemented, then that can create some discontent.”



## 2 KEEP TALKING

“I think the worst thing for people is when there’s no communication because it’s the unknown,” says Crook. “They don’t know what they’re moving into.” McCarthy Tétrault brought in their designer to present various possibilities; they also explained the reasons for the move and its progress via a regular newsletter, in town halls and on an intranet site with articles and photographs showing the latest developments.



## 3 APPOINT CHANGE CHAMPIONS

“Sometimes the most vocal opponent can become the biggest supporter of the change if they understand the reasons behind it,” says Hancock. At McCarthy Tétrault, a move committee helped make the decisions then explained them to their colleagues one-on-one and got their feedback. “We also had them visit the construction space,” says Crook. “We really brought them along on the journey to say, ‘You’re part of this—is there anything that you’re seeing along the way that concerns you?’”



## 4 TRY BEFORE YOU BUY

McCarthy Tétrault brought in samples of furniture and equipment for staff to try out and vote on. “This was the first time we were giving our people choice in what technology they would like to work with,” says Crook. “So they were really engaged in the process and making a selection versus us telling them, ‘Here’s exactly what you get.’ I think all of us like to have our voices heard versus being told what we’re going to be provided.”



## 5 GIVE SOMETHING BACK

Let staff know that the move is not just about reducing space and saving money but about making the space function better for them, says Hancock. Make sure there are fun spaces for staff to collaborate and destress, and add more functional meeting spaces. Provide technology that allows staff to work in a space most suited to the task and consider teleworking for some staff where appropriate. “Things like that can really help the transition to open plan.”

CHAPTER 3

# Performance





# Sales Calls

Telus Corp. and the Canadian Professional Sales Association (CPSA), headquartered in Toronto, launch a new sales training and certification program for the Vancouver-based telecom's employees this fall. CPSA president and CEO Peter Irwin, and Louis Morin, VP of sales performance culture at Telus, share a few tips *by Felicity Stone*

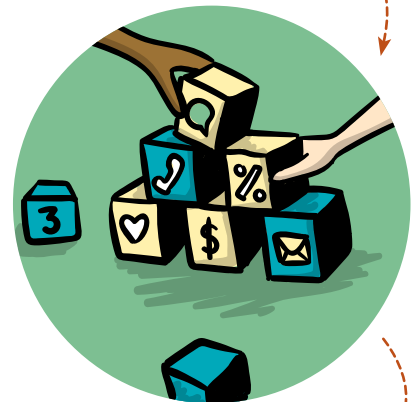


## 1 INVEST IN YOUR LEADERS

Companies have a tendency to promote their top salespeople to sales director, but they don't spend time coaching the coach, notes Morin. "The best return on investment is to make sure that first of all you invest in your leaders, because they have to coach, and they have to help their sales team."

## 2 DEFINE WHAT YOU'RE COACHING FOR

Doing a needs assessment of the person to be coached is key, Irwin advises. "Once you've undertaken that needs assessment, you know what the needs of that person are. Then, from a company's perspective, one needs to develop a plan." The plan can be something the coach does on their own or an external training program.



## 3 PROVIDE A STRUCTURE

"When I was a young sales director, I thought I was a great coach because my door was always open—I was always ready to help my salespeople," Morin says. "But if you're not structured, what happens is that you're only going to talk about issues and problems. You're never going to take time to really talk about, 'Let's practise on the messaging or the call planning. Let's review an opportunity together, and I'll challenge you and try to bring you some ideas and values.'"

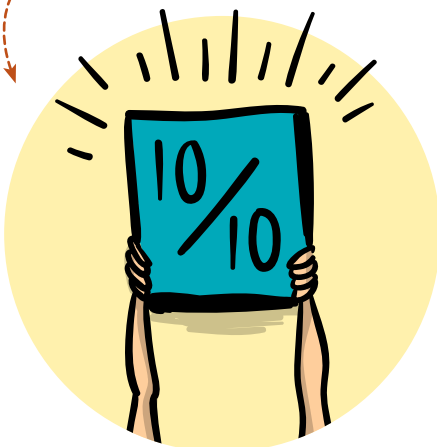
## 4 REINFORCE THE TRAINING

Many organizations undertake some type of training but fail to follow up with coaching and reinforcement, Irwin points out. "Don't put somebody in a course for three hours and expect the problem to be solved," he says. "That's the start of a learning journey. As a coach and as a manager, your job is to continue to reinforce the learning and the behaviours that are expected from what was being taught in that course."



## 5 MEASURE PERFORMANCE

"There's a saying, 'If it doesn't get measured, it doesn't get done,'" Irwin says. "If you've got something that you're trying to train against, to coach against, you've got to make sure you've got some definable metrics which you can measure your progress against. Louis and his organization are very much focused on having things called KPIs, key performance indicators."



# Managing Expectations

How to get what you want out of employees: Rob Prowse, a UBC professor of organizational behaviour and human resources, and Michael Timms, founding principal of Avail Leadership, weigh in on effective performance management *by Felicity Stone*



## 1 DIVIDE AND CONQUER

“Think of performance planning and performance review as bookends,” says Prowse. “Performance planning is best labelled goal setting. Performance review is about evaluating achievement of goals at the end of the performance review period.” When you separate the career development discussion from the performance review discussion, says Timms, “it’s really sending a clear message saying we think that talking about your career development is so important that we’re going to make it a separate process.”

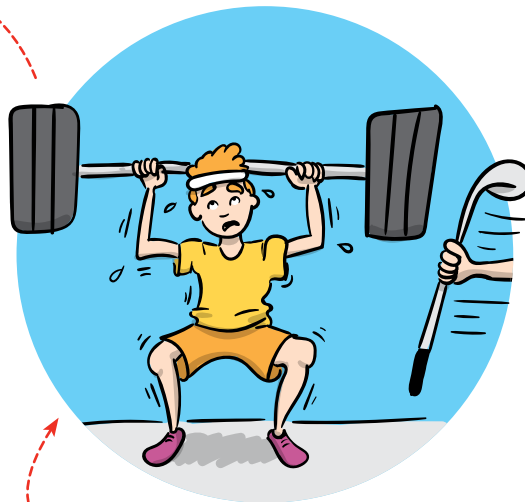
## 2 DEFINE TASKS AND RESPONSIBILITIES

The goals defined by a company’s strategic plan need to be cascaded down through the organization into departments and then ultimately through leaders and individual contributors, says Prowse. “Probably the most important job of management and probably the most basic need of employees is knowing what’s expected of them,” says Timms. Give staff the big picture, help them understand what you are trying to achieve—then give them some freedom to decide how to achieve the goals. “That allows them to take ownership.”



## 5 DELIVER THE VERDICT

Appraisals by the employee and manager are essentially a summary of coaching conversations during the year, says Prowse. He doesn’t advocate 360 assessments from other people as the return on investment is low. Timms says some companies are replacing the annual review with frequent stewardship meetings. “When you ask your managers who are your star employees, they can tell you right off the top of their head,” he says. “The world doesn’t fall apart if you don’t have some totally objective system in place to justify your performance ratings.”



## 4 FOCUS ON STRENGTHS

“You’ll get far greater bang for your buck, far greater improvement in performance, when people focus on their strengths and try to improve their strengths and, where possible, work around their weaknesses,” says Timms. “We need to be thinking in terms of what’s going well and what do people need to do differently and better, not what they’re doing wrong, not necessarily where their weaknesses are,” says Prowse. “These are words that are not empowering to people.”



## 3 ACT AS A COACH

Coaching serves two mandates, says Prowse: to give feedback on the relative progress of achievement of goals; and to reduce the surprise factor at the end of the year. Managers should set basic parameters and then back off, acting as a resource when employees need guidance, says Timms. Micromanaging decreases employees’ motivation: “As soon as you tell them specifically what to do and how to do it, all of a sudden it becomes work.”





# Pick Up the Slacker

Eitan Sharir, president of culture and organizational performance at Dynamic Achievement Group, a corporate culture, leadership and performance consultancy in West Vancouver, and Danielle van Jaarsveld, associate professor and division chair of organizational behaviour and human resources at UBC's Sauder School of Business, offer advice on managing an underperforming employee *by Felicity Stone*



## 1 IDENTIFY THE CAUSE

"The factors could be related to their coworkers, their supervisor, a lack of training or something in their personal life," van Jaarsveld says. Being underchallenged or overworked can affect performance. "You have a reliable employee, you give them more and more work, and other employees aren't being given as much work, and they feel put upon, and they pull back their effort," explains van Jaarsveld. Sharir recommends determining "the gap between what is currently being delivered and what you actually want."

## 2 DEFINE CLEAR GOALS

Develop a plan—it could be a 60-, 90- or 120-day performance development program—with clear tasks, goals and outcomes, Sharir advises. "If you think of a top sports team, every player knows exactly what the goal is, and they're very clear on what is expected of them," he notes. "Asking the employee to come to the meeting with a self-assessment can be very instructive to you as a manager," van Jaarsveld says. "It can also help to reduce the employee's anxiety about the discussion and provide them with a voice in the process."

## 5 DECIDE ON NEXT STEPS

If the employee is performing and doing what they're supposed to, keep on supporting them. If not, "you now have to look for alternative options—maybe a different role, maybe a different company," Sharir says. "One more thing that I would look at here is return on investment," he adds. "How much are we willing to invest in the employee to continue with this process when we have already invested coaching and a program and meetings and they're not performing? Are we willing to continue to invest in them or not?"



## 4 TAKE NOTES

"Sometimes you're in a situation where you have to make that hard decision that this individual is not capable of performing at levels that this organization expects," van Jaarsveld says. "Then you need to have documentation that these meetings have taken place, you've provided the individual with feedback about their performance, and so as a manager you've met your obligations and responsibilities as an employer to help the employee try to improve their performance and provide them with support to do that."



## 3 SUPPORT THE EMPLOYEE

Meet formally at least every two weeks to check on progress and help the person to stay on track and focused on the goal, Sharir says. "You can assign an accountability buddy to work with them during that period, someone who is really doing well so it's one of their team members rather than just the manager," he adds. "When you're delivering the feedback, make sure that you're focusing on the behaviour and/or the results, not the person," van Jaarsveld warns.



CHAPTER 4

# Legal Issues



# Going to Pot

The impending legalization of marijuana in Canada means businesses should look at their workplace impairment policy. Employment lawyers J. Geoffrey Howard, a partner at Roper Greyell LLP in Vancouver, and Cindy Zheng, associate at McQuarrie Hunter LLP in Surrey, discuss who can do what at work *by Felicity Stone*



## 1 GO BROAD

Consider a policy covering anything that might cause impairment and safety issues, advises Zheng, who notes that “prohibiting non-medicinal marijuana is acceptable, and that falls under the general obligation that you have to show up to work able to do the job safely.” Howard adds that an employer has a right to expect staff to be sober when they’re working. “It’s the same as someone who recreationally drinks alcohol,” he says. “There’s no legal issue about prohibiting recreational marijuana use by your employees, and certainly prior to working or during work. You’ve got an unlimited ability, if you wish, to simply say no.”

## 2 BE AWARE OF THE B.C. HUMAN RIGHTS CODE

Addiction is considered a disability under the code, so an employer must accommodate an employee who is addicted to marijuana, Zheng warns. It’s the same responsibility you would have to an alcohol addict, explains Howard: you don’t have to let them come to work stoned or high, but you will have to explore what “reasonable accommodation” you can provide. There are no detailed guidelines regarding duty to accommodate under the Human Rights Code or in case law, so he recommends consulting experienced labour and employment lawyers.

## 5 FOLLOW THROUGH

Send the message that if you see somebody breaching the policy, you will enforce the consequences, says Zheng, adding that random and mandatory testing isn’t available to employers without a reasonable basis for demanding it. “So depending on what your industry is, what does impairment look like, and when is it beyond a trivial threshold?” In the case of marijuana, Howard observes, there’s no accepted effective test for impairment. “But if facts come to your attention that someone may be impaired by marijuana in your workplace, then you’ve got to take steps,” he says, because employers have a significant legal obligation to keep the workplace safe for everybody.



## 4 EXPLAIN THE POLICY

Make sure employees understand what the policy is, what it means, what the Human Rights Code says about medical and non-medical marijuana, and their duty to disclose that they’re using it. “The duty to accommodate is a two-way street, and where your safety or your judgment or your reactions could be impaired, there is an obligation on the employee to disclose,” Howard says. Zheng’s suggestion: “Create a supportive environment so that people disclose willingly by themselves before an accident happens.”



## 3 KNOW HOW TO MANAGE MEDICAL MARIJUANA USE

If an employee has a disability for which they’re using marijuana as a medication, under the Human Rights Code the employer must also accommodate them up to the point of “undue hardship,” Zheng says. The employer is entitled to verification from a medical doctor that this is a legitimate treatment for a real condition that meets the test of disability, points out Howard, and, as with addiction, needn’t accept whatever the employee wants to do. “If someone’s taking a strong opioid-based painkiller, you have the same issues and the same concerns,” he says.





# Whose Bright Idea Is That?

Intellectual property lawyer Christopher Scott of Oyen Wiggs Green and Mutala LLP and Georg Reuter, partner at Richards Buell Sutton LLP, discuss who owns what information in the workplace *by Felicity Stone*



## 1 YOU BOUGHT IT— BUT DO YOU OWN IT?

If you pay an independent contractor to design your website, “in Canadian law, the contractor owns the copyright in that website unless they agree, in writing, to assign the copyright,” says Scott. “Consider also obtaining a waiver of moral rights, which are additional, non-transferable rights held by the author of a work.” And make sure your domain name is registered in your company name, not the name of the employee or consultant handling the registration.



## 2 BEING PUBLIC DOESN'T MEAN IT'S UP FOR GRABS

“Just because something is publicly available doesn't mean it's in the public domain,” says Scott. “Copyright enables the owner to prevent people from copying even if the copyrighted work is widely distributed.” That means that if you copy a photo off of Google Images and put it on your website, let's say, then the owner of the copyright for that photo might sue. “This happens pretty regularly.”

## 3 PSST. CAN YOU KEEP A SECRET?

“If you have trade secrets—things that are secret and derive value from their secrecy—then take positive steps to keep them protected,” says Scott. Companies should enter into confidentiality agreements with their contractors, employees and third parties to whom confidential information and trade secrets may be disclosed, recommends Reuter. Adds Scott, “It can be advantageous to take additional precautions as well, such as training your employees.”



## SECRET VAULT

CONFIDENTIAL



## 4 PROTECT YOUR GOOD NAME

“Distinguish between a trademark registered with the Canadian Intellectual Property Office and a corporate name (for example, registered with the B.C. Corporate Registry),” says Scott. “The registered company is a much weaker protection of your name, and it really only stops other people from registering the same company name—and then generally only in the same province,” says Reuter. “If you had a Canadian trademark, you'd generally have Canada-wide protection.”



## 5 PROTECT YOUR MOST IMPORTANT ASSETS

“In many companies, particularly those with a technology or IP focus, your employees are your most valuable assets,” says Reuter. “When these employees walk out the door, your assets may be leaving with them.” To avoid these risks, he says, managers should encourage retention of key employees and ensure that the IP assets developed and managed by these employees belong to the company. □

# Declaration of Independence

Uncertain times call for flexible work arrangements. Simon Kent, principal of Simon Kent Employment Law, and Brent Lyon, partner at recruiting company David Aplin Group, discuss the ins and outs of working with, and as, an independent contractor *by Felicity Stone*



## 1 JACK, BE NIMBLE

Independent contractors can give employers more flexibility, which is especially appealing to project-based businesses, says Lyon. “Having contract employees gives you a little more control over head count. You can more closely track your staffing levels with client needs.” One executive told him, “The big mistake I made was hiring too many full-time employees. I should have made sure more of them were contractors because that’s what ended up sinking the business.”



## 2 WATCH WHAT YOU CALL YOUR “WORKERS”

“The biggest misconception that I hear from anyone involved in this is they’ll say, ‘But the worker has agreed that they’re an independent contractor,’” says Kent. “It’s really not that relevant what the parties thought it was. Just because the employer and the worker want to call the relationship an independent contractor relationship, it doesn’t necessarily mean that it is.”

## 3 ACTIONS SPEAK LOUDER THAN WORDS

There can be serious tax ramifications and penalties to getting it wrong, says Kent. “If you have a situation where an employer has 10 people who are calling themselves independent contractors, and CRA comes in and goes, ‘No, they’re actually employees—and you should have been withholding CPP and EI for two years,’ you can be looking at tens of thousands of dollars that you need to pay back.”



## 4 TEST THE RELATIONSHIP

There are various tests to determine how independent contractors truly are: for example, using their own tools, setting their own hours, the ability to subcontract work and the opportunity for profit or loss. “In my experience with this, it’s just almost like a scale,” says Kent. “The more autonomy the person has, the more they’re going to be thought of as an independent contractor.”



## 5 REWARD RISK

Independent contractors shoulder more risk than staff and deserve compensation, says Lyon. “Contractors will be paid 25 per cent to 40 per cent more on an hourly basis.” They don’t get benefits and have to pay their own CPP, but they do get tax write-offs not available to employees. “The entire system is rigged in your favour if you have the personality to suit. It just comes down to your appetite for risk and your ability to be a bit of a self-promoter.” □



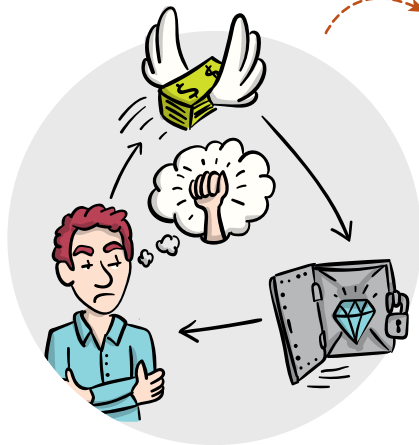
# The Fraud Squad

One-third of B.C. businesses have reported being victims of fraud. Jasper Smith, owner of Due Diligence Canada, and Dan Zitting, CPO of ACL, tell us how to avoid being one of them *by Felicity Stone*



## 2 KNOW YOUR EMPLOYEES

Do background checks on potential employees and outside contractors like accounting or bookkeeping services, advises Smith. And once they're hired, get to know them. "You don't need to spy on them," he says, "but you need to be able to learn about what they're doing: are they taking holidays, are they refusing promotions, are they living beyond their means?" Zitting adds: "A bookkeeper who never takes vacation—it's often because there's some kind of a fraud going on."



## 1 KNOW THE ANGLES

Occupational fraud involves three factors known as the "fraud triangle," according to both Smith and Zitting. First is some sort of pressure or motive, such as needing money. The second is opportunity due to access without controls or oversight. "It's not just cash or cheques or anything financial," says Smith. "It can be items from the company, the inventories—anything the company's selling or purchasing." And finally there is rationalization—"like, hey, it's a big company and they don't pay me fairly anyway so this is actually only fair," says Zitting.

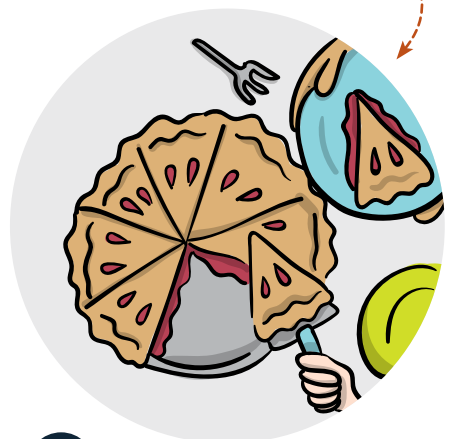
## 5 LOOK FOR TIPS

Smith suggests providing a tips line or an atmosphere where people can provide tips about suspected fraud; over 41 per cent of frauds are identified by tips, he notes, compared to around 20 per cent through other means. "The business owner really wants an open and healthy workplace that will allow management and staff to express any concerns they may have about any potential fraud," he says.



## 4 MAINTAIN CONTROL

As well as segregating duties, managers should still have hands-on control and know exactly what's coming in, says Smith. "For instance, access to the mailbox should be the business owner and maybe one other person. And that mail should be delivered to the owner of the company unopened." Or, says Zitting, once a month the owner or manager of the business could review new vendors. "Something like that might detect the fraud even though it's already happened. Detect it early and make it so it doesn't turn into such a big deal."



## 3 BE DIVISIVE

Never give one person control over all the finances. For example, the same person should not be able to set up accounts for new vendors and issue cheques to vendors, says Zitting. Smith also advises giving employees access only to the part of the server they need: "Regular employees won't need access to accounting. Accounting may need access to other parts of the server. So that should be split up." And make sure to change computer and telephone passwords regularly, he adds.





CHAPTER 4

# Hiring and Firing



# Getting a Grip on Growth

For fast-growing companies, hiring quickly and smartly is critical. Craig Brennan, CEO of QuickMobile, Erica Groschler, partner at Incremanta Consulting, and Robert Murray, principal of Robert Murray Consulting Ltd., tell us how to manage a burgeoning workforce *by Jacob Parry*



## 1 FIND A GOOD STORY TO TELL

When QuickMobile, a maker of apps for corporate events and conferences, had to “double, then double, then double again” its workforce during a period of rapid growth, Brennan says his most important recruitment strategy was sharing the names of companies QuickMobile was working with—the likes of Microsoft, Samsung and Adobe. “We shared stories about our leading customers to highlight how and why they used us—and that really helped us to attract talent.”

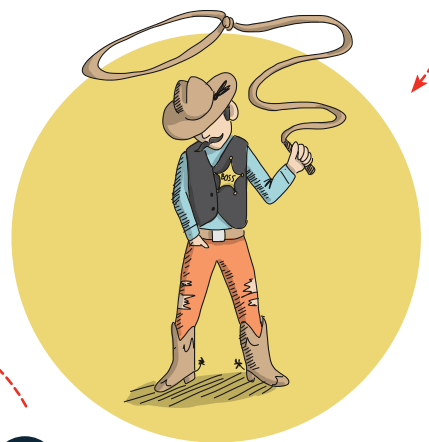
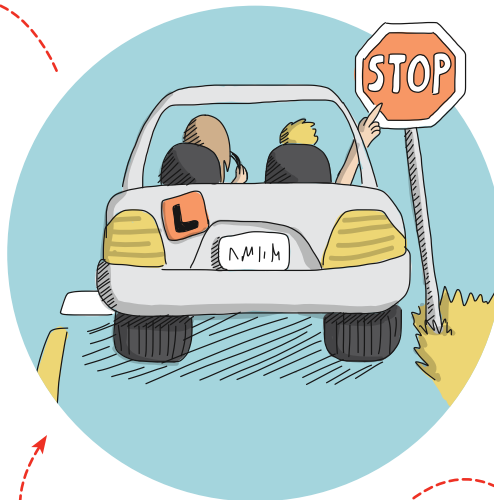
## 2 GIVE EMPLOYEES A SAY IN THEIR FUTURE...

Whether it’s a new office or new product line, growth implies change—and when employees experience change, they get nervous, says Groschler. So when you’re making changes, include them in the process. She suggests creating a sandbox for them to pitch ideas about what their responsibilities and workplace will look like while at the same time setting clear parameters on how big that sandbox is. “The smaller the sandbox, the more likely you are to face resistance,” she advises. “By getting their input, you’ll also get their engagement and their ownership.”



## 5 DON'T FORGET THE BOTTOM LINE

Yes, you need to hire and hire now to keep up with the work, but make sure you can afford the head count. “We’ve seen lots of customers who have grown themselves into near bankruptcy,” says Murray of companies that hired to meet business demands but then couldn’t make payroll as they waited for a cheque. “If you’re going to double your business in a given period, you’re going to need to have the cash on hand, or a line of credit, to pay those bills.”



## 4 LEAN ON YOUR VETERANS

When adding a bunch of new employees in new regions or in new parts of the company, you risk creating a chaotic situation—not unlike a farm with a bunch of “chickens running around with their heads off,” says Brennan. He recommends seeding new teams with experienced employees. Veterans know your company’s culture, processes and procedures, so they’re the best qualified to pass on knowledge and provide guidance to newcomers.

## 3 ... AND KEEP THEM IN THE LOOP

Amid all the new faces, it’s easy for current employees to feel lost in the crowd. So keep them up to speed with changes, big and small. “Employees want to hear from their boss,” says Groschler. “Even if a manager thinks they don’t have anything to say, they’re still their team’s anchor for knowing that.” She advises managers to use clear and constant communication with employees when a company is hiring rapidly and creating new teams.



# Termination Without Tears

Sometimes even a popular employee has to be let go. Debby Carreau, founder and CEO of Inspired HR, a consulting firm with offices in Vancouver, Calgary and Edmonton, and Shawnee Love, president of Kelowna's Love HR Inc., discuss how to avoid resentment from the departing worker and their ex-teammates *by Felicity Stone*

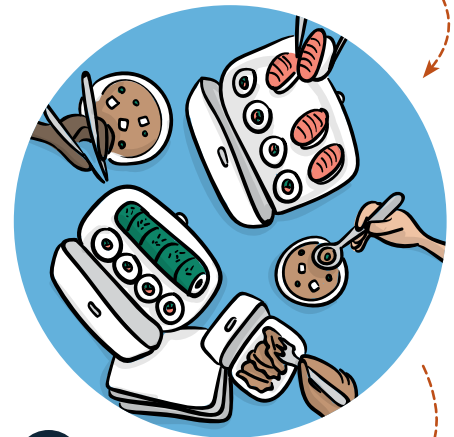


## 1 TREAT THE EXITING TEAM MEMBER WITH RESPECT

Instead of grabbing their keys and marching them out the door, Carreau advises, try to talk to the employee about how the organization is shifting to a new direction and how it can help them move to the next stage of their career. "Most employees are pretty realistic," Love says. "They're not expecting the moon—but they do want to feel like you care and like you're trying to do your best and you're trying to be fair."

## 2 ACKNOWLEDGE THAT TERMINATIONS ARE HARD ON EVERYONE

Right after the dismissal, bring the team together to share the news, especially if it works closely with the exiting individual, Carreau suggests. If you can get across the idea that the company is devastated to lay that person off but wishes them well and is giving them support to get on their feet, Love explains, your staff will feel that you're taking care of their beloved peer. "And if the same thing were to happen to them, the company would take care of them too."



## 3 SUPPORT THE SURVIVORS

You'll often see a dip in productivity and morale among remaining staff, Carreau notes. Have the manager who handled the termination and the HR department keep their doors open and encourage dialogue. If staff aren't forthcoming about their feelings, recommend that they use your employee assistance program. Bring everyone together by, for example, ordering lunch into the office or taking them out for a quick drink after work. "It's really engaging the people that are there to realize there's other people they can have fun with and enjoy their company," Carreau says.

## 5 BE GENEROUS

An employer can fund several fair severance packages for much less than the cost of one lawsuit, so always err on the side of taking care of exiting employees, Carreau says. "It's just as important to treat everyone internally and externally well and fairly and consciously when people are exiting the organization as when onboarding employees—also, they're going to be ambassadors in the community."



## 4 KEEP IN TOUCH

Love's advice: make sure everyone knows that the person who's leaving is still welcome, appreciated and valued. And don't forbid your employees from staying in contact with the person who has left, Carreau warns. It's not realistic to say, "I don't want you guys talking to her. I don't want her knowing what's going on in the organization. Just get her out of your life."





# And Now, Some Parting Words

Done right, an exit interview can make your business better. Joanne Klein, Goldcorp vice-president, people, and Clear HR principal consultant Cissy Pau tell us how to elicit constructive feedback from departing employees *by Felicity Stone*

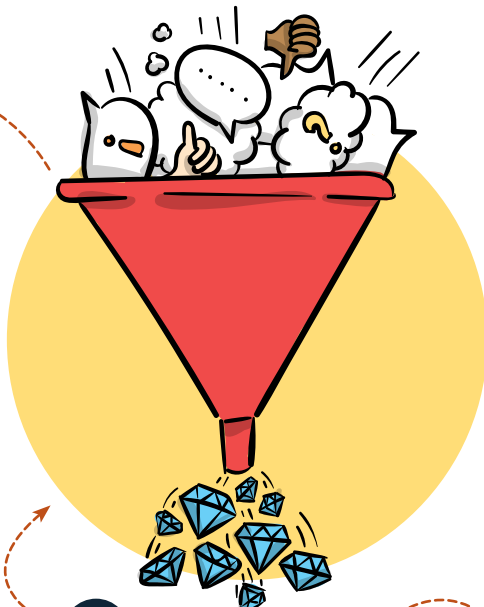


## 1 ASK THE RIGHT WAY

Ask open-ended questions rather than ones that elicit yes or no answers, says Pau. Use the same questions for all exit interviews to ensure consistency. “You can ask the same question of 20 people, and they’ll all give you a slightly different answer, but I think that there’s value in that,” says Klein. “Whereas if you’re doing closed questions and it’s a yes/no, it’s really hard to do anything with that.”

## 2 LOOK FOR TRENDS

Gathering feedback from exit interviews is a great way to identify trends, patterns and themes from departing employees, says Pau. “Employees often have great ideas about things we could do differently, which we love to hear, but sometimes there is just a genuine shift in employee preference,” says Klein. “It’s not been a significant issue, but it’s something that’s bubbling, and if it’s not addressed it could become one.”



## 5 SAY THANK YOU

“Thank the employee for their honesty and feedback, and commit to using the information provided to improve your workplace,” says Pau. “Wish your employee success in his or her new endeavour.” Says Klein: “I always thank them for their honesty, because no matter how professional and diplomatic you are, it takes courage. We always thank them for that because it’s what makes us better.” □

## 4 FOLLOW THROUGH

An exit interview gives you good insights into improvement opportunities within your organization, says Klein. “This can’t just be a check in the box compliance piece. We’re investing the time and effort because we genuinely want to know the feedback.” Consider doing a “stay interview” or an employee satisfaction survey with remaining staff to determine whether feedback from exit interviews reflects the views of the people who are still there, says Pau.

## 3 LET’S BE HONEST

Klein finds that employees generally appreciate the opportunity to give feedback: “They will likely do it in a diplomatic manner, but you could argue that that is just being professional.” Says Pau: “When there’s an intermediary or middle person, they’re sometimes more open. We will often ask, ‘Can we relay this back to the company or would you be more comfortable if we aggregate it with other data?’ Most of the time, they’re very comfortable because it’s different coming from us than from them.”



# Getting Fit

The number one reason an employee doesn't work out, according to many employers, is poor fit. Jim Fearon, Hays VP of Western Canada operations, and Headhunters.ca president Cam Macmillan offer pointers on how to make the right hire *by Felicity Stone*



**1 KNOW WHAT YOU WANT**  
Headhunters.ca has candidates fill out a personality profile to assess work style—for example, leaders versus followers. “You don’t necessarily want everybody as a leader or it makes for a bit of a dysfunctional team,” says Macmillan. Hays looks at where candidates fit in four categories: conformity, social behaviour, team versus individual, and work ethic. For example, says Fearon, do you want somebody who’s a workaholic, somebody who’s very laid back or someone who’s somewhere in between?”

**2 MIX THINGS UP**  
“We like to shake it up a little bit to find that real person,” says Macmillan. “We’ll ask what they do outside of work and accomplishments outside of the office and then loop it back into accomplishments within the office.” From a candidate’s perspective, the interview process is a sales pitch, so your line of questioning needs to be able to get through that façade, says Fearon. “You need to try and tap into who the person really is. That’s why the behavioural interview questions are so important.”

**5 ASK THE TEAM**  
“We do a debrief with the team following the initial interview, and we ask our admin staff what are their impressions,” says Macmillan. “Because a lot of times they’ll put their game face on for the interview, but when they’re sitting down having a coffee waiting for the interview, you might see someone different.” The team doesn’t decide whether to hire the person, but they can have the opportunity to say what they think, says Fearon. “Because, ultimately, they’re the people who are going to be working with them.”



**4 TAKE IT INSIDE**  
Before making a firm decision, Fearon gives the candidate the opportunity to meet with a couple of team members and ask them questions. “It’s obviously also an opportunity for us to see how that person engages with those team members.” After the first couple of interviews, Macmillan invites the candidate to job shadow in the office. “It really is a two-way street. It’s got to work for the person coming in, and it’s got to work for our team as well.”

**3 TAKE IT OUTSIDE**  
Depending on the position, inviting a candidate to a social event can help gauge how they might act outside the office, says Fearon. Macmillan takes candidates to a coffee shop or restaurant. “Sometimes the guard comes down there, and you get a better sense of that person,” he says. “We really like to see the people in different settings and see how they react. Sometimes they react differently to a server in a restaurant than they would in a formal interview.”



# Foreign Affairs

Bruce Harwood, an immigration lawyer with Boughton Law, and Alison Peever-Langford, recruitment consultant with Chemistry International Recruitment Service, discuss the challenges, risks and benefits of hiring foreign workers *by Felicity Stone*



## 1 LOOK FOR EXEMPTIONS

If there's a way to lawfully avoid Service Canada's Labour Market Impact Assessment process, do it, advises Bruce Harwood. Labour mobility provisions in trade agreements like NAFTA eliminate LMIA requirements for certain occupations, most of which require a minimum baccalaureate degree. Intercompany transferee provisions allow a Canadian company to bring in a person who is an executive, a senior manager or someone with specialized knowledge who has been employed by a related corporate entity outside Canada for at least one of the past three years.

## 2 FOLLOW THE RULES

If you need an LMIA, make sure you meet Service Canada requirements first, advises Harwood. Post the position on the federal job bank or WorkBC plus two other national sites like Monster.com, Workopolis or Indeed until a decision is made on the application. Keep track of applications to demonstrate the availability of qualified Canadians. And make sure you're offering the prevailing wage based on Canada's national occupational classification (NOC) for that region and line of work, says Alison Peever-Langford.



## 5 HELP THE WORKER GET SETTLED

"They get off the plane. They've never been to Canada. So that's not where your commitment stops to this person," says Peever-Langford. You need to have a plan for settlement: where they're going to live, how they'll get to work. "The positive is that you get really good workers, you get committed staff, and you get them long-term. We have about a 95 per cent retention rate, so of all the people we've brought in, there have been very few who ever go home, who don't complete their contract. And 95 per cent choose to stay in Canada."



## 4 HIRE THE WORKER

Once Service Canada approves the LMIA, "that basically is the green light for me to then hire someone who isn't Canadian," says Peever-Langford. The recruiting company or the applicant can then apply for a work permit. An applicant from a visa-exempt country will apply for a work permit from Immigration Canada at the port of entry. An applicant who needs a visa will apply at a Canadian diplomatic post abroad, says Harwood. "They will check the LMIA against the application for the work permit, and as long as immigration is satisfied, they'll issue the appropriate work permit."

## 3 TALK TO THE APPLICANT

Make sure the person has a valid passport and no criminal convictions. "Immigration law will bar entry to persons with specific convictions," says Harwood. They can also be barred for medical reasons. "You can ask someone to get a medical," says Peever-Langford. "The other thing is, just do your due diligence so that you know the person you're hiring can actually do the job that you're hiring them to do. We do Skype interviews. The worst case scenario is that you get somebody here after all this time, money and effort, and they actually aren't a good fit."





# Please Don't Go!

What to do if a key employee leaves? Sandra Reder, president and founder of HR consulting firm Vertical Bridge, and Go2HR CEO Arlene Keis outline how to prepare a backup plan *by Felicity Stone; illustrations by Sabrina Smelko*



## 1 IDENTIFY KEY POSITIONS

“Look at every single job, and if that person was to walk in and say good-bye, how much of an impact would it have on your ability to deliver on your programs, your services, your products or to keep your business going?” says Reder. “A lot of people think succession planning is just for leadership continuity, but it really is for critical skill and knowledge and potential technical and organizational knowledge as well,” notes Keis.

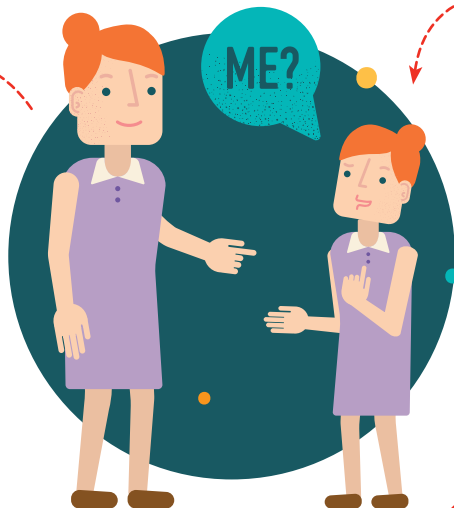


## 2 ASSESS THE COMPETENCIES AND SKILLS REQUIRED

You also need a way to incorporate that knowledge into the rest of your organization, says Keis. Reder advises asking incumbents to put together a procedures manual, if appropriate to the position. “It’s a great way to engage them if you say, look, we want to put a procedures manual together so we really understand what you do in the event that you, say, win the lottery.”

## 3 PINPOINT POTENTIAL UNDERSTUDIES

“Target the specific individuals that have these skills, discuss it with them, and create a development and retention plan with them so that you’re engaging—it’s not something you’re doing to them, you’re doing it with them,” says Keis. “It’s much easier to grow from within than to have to pull someone in who is new to your company,” notes Reder, who advises using performance reviews to spot which people are promotable in all key areas.



## 4 CROSS-TRAIN

Use cross-training techniques to ensure more than one person is capable of performing essential tasks or have the incumbent mentor someone else. “Even at the higher level that can be done to some extent,” says Reder. “Most people in a job like to learn, they like to be challenged, so if they’re being cross-trained like that, it makes their jobs more interesting, and it’s a form of engagement.”

## 5 CONSTANTLY RECRUIT

“If you get unsolicited resumés, it may be worth somebody’s while to make one phone call and chat with that person and say, We have nothing available right now, but what are you looking for?” says Reder. “Just take some minimal notes.” Then if a key employee does leave, you can call back to see if the person is still interested. “You should never have to start from scratch.”



# How to Talk Dollars and Sense

HR consultant Cori Maedel, CEO of The Jouta Performance Group, and career counsellor Marlene Haley, principal of Careers You Love, Inc., tell us how to negotiate salary from both sides of the desk *by Felicity Stone; illustrations by Sabrina Smelko*



## 1 START WITH A PLAN

A company's compensation plan needn't be fancy, says Maedel, but it does need to fit the organization's culture, values, vision and budget. Some employers want to attract A+ players and are willing to pay accordingly; others may pay less but compensate with extra holidays or other perks. "They need to know what their threshold is," says Maedel. "Do this before you actually advertise for the role."



## 2 DO YOUR RESEARCH

As a prospective employee, you shouldn't be walking into an interview without having researched that company and industry and done a salary survey, says Haley. Check job postings or ask at least 10 colleagues the salary range for similar positions in that industry. Maedel plugs market data into a spreadsheet to determine salary ranges for clients.

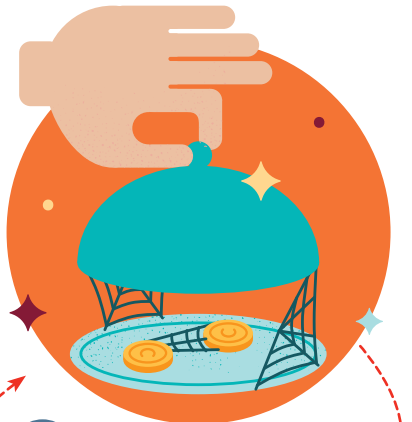
## 3 KNOW WHAT THE JOB ENTAILS

Don't discuss salary until the job has been clearly defined for you and you know exactly what your responsibilities are going to be and the scope of responsibility, says Haley. Otherwise you could be negotiating for the wrong job. Maedel recommends asking to see the company's employee handbook to understand not only responsibilities but how (and how often) compensation is reviewed.



## 4 YOU GO FIRST

Ideally you want the employer to discuss salary range first, says Haley, but "if you are going to be forced to talk, you're not going to be all that squeamish about it if you really know what's going on in the industry. Start your range of what you're looking for just below what you know is the employer's maximum."



## 5 NO, YOU GO FIRST

"I would never as an interviewer go first," says Maedel. An employer doesn't have to divulge what their range is. "It is a cat and mouse game—a little bit back and forth—but both sides have to be really clear what their bottom lines are. You ask them what their salary expectations are, and they'll either fit within your range or they won't."

## 6 IS THAT ALL THERE IS?

If the bottom lines are too far apart, the employee can offer to discuss salary in return for other considerations. "But there has to be a reason, because I want to know if I'm hiring you that you are really clear what you are worth and that it's a reasonable worth," says Maedel. "Don't complain to the employer a year later that you're not making what you're worth. It's like getting married and expecting your husband to change."



CHAPTER 5

# Strategy





# Smart and Smarter

How do you manage an employee who is more experienced or knowledgeable than you are? Rick Cotton, assistant professor at UVic's Peter B. Gustavson School of Business, and Tara Landes, president of Vancouver-based management consulting firm Bellrock Benchmarking Inc., offer some tips *by Felicity Stone*



## 1 RECOGNIZE YOUR STRENGTHS

"You were hired for a reason, and often that reason has to do with things that your employees can't do, like strategic planning or strategy execution, perhaps coaching or bringing out the best in the team," Cotton says. Even if you lack technical knowledge, strength in other areas such as people skills and managing change can provide a halo effect, Landes notes.



## 2 MANAGE FOR RESULTS

Understand how you and your team members contribute to successful strategy execution and sustained competitive advantage, Cotton recommends. "A manager who has a capable or competent person underneath them doing that job should be able to manage them based on the results that are expected," Landes says. Set clear targets for what employees are supposed to achieve and what outcomes are expected.

## 5 KNOW WHAT YOU DON'T KNOW

"If you're faking it, people will sniff it out a mile away, and especially if you really don't know what you're doing, you're in big trouble," Landes warns. She advocates saying, "My job here isn't to do that technical stuff; that's your job, and you're going to be very successful at it. My job is to facilitate that." Learn from employees and alongside them so you build shared expertise, Cotton suggests. "When you don't know something, leverage what you do know, seek clarification and ask follow-up questions," he says. "This will build credibility."



## 4 FIND OUT WHAT MOTIVATES YOUR STAFF

"What is it that they're trying to get out of doing that work?" Landes asks. For example, some people are motivated by competition, and they want to see how they're doing relative to their peers. Some enjoy persuading fellow workers to buy into their ideas, while others need to feel part of a team. Understanding employees' big picture of where they want to go will help you coach them better in the short and the long term, Cotton remarks. Have one-on-one meetings to review achievements, goals and areas that need your attention, he adds.



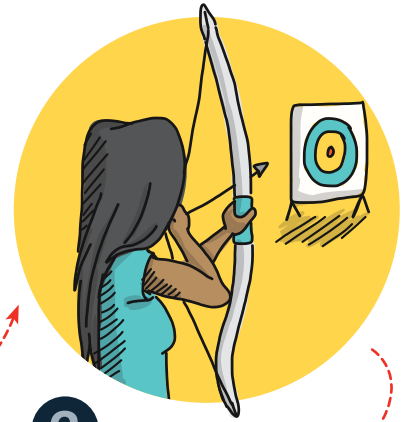
## 3 MAXIMIZE POTENTIAL

"While your employees might have detailed knowledge and expertise, figure out other ways that you can help them, where they want to go and what strengths they can maximize, but also what weaknesses can be brought up to an appropriate level," Cotton advises. You may be able to coach them in communication, goal setting, time management or influencing skills, for example.



# Pitch Perfect

What does it take to get media coverage? Adrienne Tanner, the Vancouver Sun's deputy editor, content, and Shaun Dickson, morning news producer for Global BC, dish on the dos and don'ts of pitching a story *by Felicity Stone*



## 2 KNOW YOUR TARGET

Check out what sort of story they cover and who does what. Then personalize your pitch and get the information right, says Shaun Dickson. "Knowing who the producers, the editors and, in TV and radio, the anchors and hosts are—and having that little bit of basic information about each media outlet—is so important. Anybody would be more receptive to someone who sounds like they know what they're talking about, knows your show and your station. The worst is when I'll get, 'Now who hosts your show?' Those things are really common."



## 1 MAKE IT NEWSY

"There has to actually be something new that warrants coverage," says Adrienne Tanner, and there has to be something different and interesting about it. "It can't just be, 'Oh, we're cool—write about us.'" Offering exclusivity can help, and the word "first" is always good—if it truly is first (she'll check). "There are some PR people who are really good, and they only pitch us things that are newsy," she says. "You learn to recognize those names, and you pay attention when those ones come in."

## 5 FOLLOW UP?

"One follow-up phone call I think is great," says Dickson. "I appreciate them. I get hundreds of pitches a week so a follow-up 'Did you see that?' doesn't hurt at all." But no more than one call—and Tanner often doesn't pick up at all. "I don't even mind a follow-up email: 'Just wanted to make sure you received.' Sometimes when I get that, I will even write back one way or the other, but I appreciate that as opposed to a phone call which is going to suck up my life."



## 4 BE AVAILABLE

Provide complete contact details, including phone numbers. "It's a lot easier for me to pick up my phone and dial a number to get a confirmation right away than to write out a whole email explaining everything," says Dickson. "You have to also be able to cough up your real people," says Tanner. "You should be making a pitch and then you should have all your ducks lined up and those people have to be able to respond really quickly."

## 3 MAKE IT EASY

"I like something that gets quickly to the point," says Tanner. "It helps to sketch out what you think the story you're trying to tell is." And put the information in the body of the email. "Don't make me double click," she says. "The chances of me reading that are way better than if you make me open an attachment," Dickson advises. "The more information you give us right off the bat in that initial pitch helps." For events, include the "who, what, where and when"; and for TV, explain the visual aspect.



# Getting to Know You

Networking at business events is still one of the best ways to make connections. Shepa Learning Co. CEO and networking guru Darcy Rezac and Rob Prowse, adjunct professor of organizational behaviour and human resources at UBC's Sauder School of Business, explain how to work a room *by Felicity Stone*



## 1 SIZE UP THE ROOM

Stand at the front, look for someone who's not tied up in a conversation, then go over and talk to them, Rezac advises. "Be careful of the pounce," Prowse says. "Sometimes we can come across as being a little too assertive and even aggressive." To join a group, do what Rezac calls the 28-second hover. "Find a friendly-looking group and just hover for, we say, 28 seconds because you can't stand it any longer than that, and try and make eye contact with somebody so they'll open the circle and let you in," he explains. "When you're in a circle talking to people that you know, widen your circle and invite people in. You're there to make contact."

## 2 INTRODUCE YOURSELF

Look people in the eye, use a good firm handshake, and tell them your name. In case you've met someone before and forgotten, say, "Nice to see you" or "Good to see you," Rezac counsels. If they respond, "Nice to meet you," ask for their name and exchange business cards. If they indicate you've already met, it helps to be networking with a tag teammate who can put out their hand and say, "Hello, my name is... I didn't get your name." "I call that the step-forward rescue," Rezac says. "That happens a lot."

## 5 BE MEMORABLE

If you're going to an event to represent the company, it's important to have business cards so people will remember who you are, Rezac says. Don't rummage for your cards, Prowse warns—keep them handy, and wear something fashionable but not loud. "If you don't want to make a statement with clothing, then depending on the brand with your business, there can be a statement made with your business card where people go, "That's a really cool logo," he adds.



## 4 DO THE BUFFET SHUFFLE

"If you're in the lineup at the buffet, that's a good place to make first contact," Rezac says. "Say hello to the person next to you, and then you can catch up with them later." Prowse recommends holding your food in your left hand and keeping your right one free so you can shake hands. "Fifty-five per cent of the way we communicate is around body language, so making sure that you're not fumbling is sending a very professional message," he notes. Rezac's take: "Your first impression is about three seconds, and it's very difficult to undo a bad impression."



## 3 DON'T GO IN COLD

Research who's attending, and find a detail about them to break the ice, Prowse suggests. Ask open-ended questions that engage people and feel less like an interrogation, and prioritize quality conversation over quantity of contacts. "Oftentimes when it's a really great-quality conversation at a networking event, people talk about that person, so you're broadening your impression with people you haven't even met," Prowse says. "Even one or two people could have an impact of up to a factor of nine."





# Who Are You, Anyway?

Darren Dahl, senior associate dean of UBC's Sauder School of Business and director of the Robert H. Lee Graduate School, and Jason Dauphinee, creative director at Eclipse Creative in Victoria, discuss when, why and how to go about rebranding *by Felicity Stone*

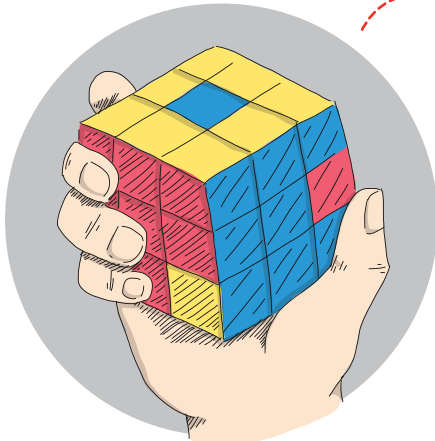


## 1 FIGURE OUT WHAT PROBLEM YOU ARE TRYING TO SOLVE

Never rebrand simply to rebrand, says Dahl. Companies typically rebrand because something has changed—for example, you are losing relevance in the marketplace or customers don't understand you. A rebranding process can come after multiple years in business, notes Dauphinee. "Maybe you're finding you're starting to plateau a little bit. You feel like maybe you're not getting enough penetration into certain markets that you would like to."

## 2 EXPLORE WHO YOU ARE AND WHERE YOU'RE GOING

"What do you want to convey and to whom?" says Dahl. If your customer has changed, who is your customer now? Dauphinee recommends asking: What makes you different? What makes you remarkable? What are you offering to the world that's different from everybody else, and how can you leverage that to make yourself more successful? "That really is at the core of a brand," he says. "It's very rarely the logo that draws people to your business. It's how you conduct your business that actually has the biggest impact."



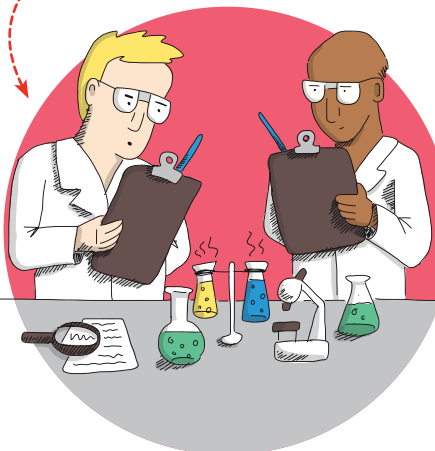
## 3 EXPRESS YOURSELF

This is the stage where you know what you can truthfully say and how you can really sell yourself, says Dauphinee. "It really should be undeniable that you're being honest and that you're hitting the right people and then combining that with some clever or quirky marketing." Executing and building the rebrand "may involve everything from working on the website to changing colours, redoing the logo, maybe even renaming and new storytelling," says Dahl. "All the different aspects that make up the brand."



## 4 TEST THE NEW BRANDING

"Before you launch, you want to make sure that everything is making sense, it's coherent and it maps across the board," says Dahl. Ask customers and employees whether it works. "It goes far, far deeper than how your letterhead looks, how your logo looks or how you display your products," says Dauphinee. "It really is a promise at its core. It's a promise that you make to your consumer, and it's a voice that needs to carry across every level of your business."

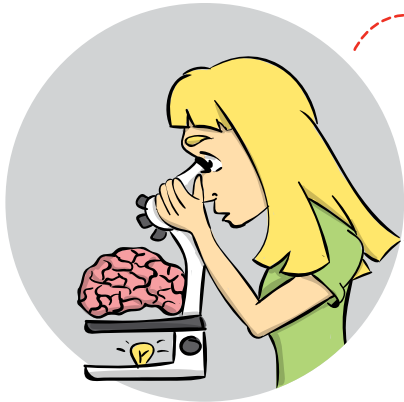


## 5 PREPARE FOR TAKEOFF

There should be a formal plan for how the rebrand will actually launch and come to market, says Dahl. For example, will it be a celebration or evolve over time? "The execution of the rebranding and how it touches the customers needs to be formally and strategically identified and planned. It should not be an ad hoc, 'Let's do this today,' because when the customer and your employees experience the new brand, they want to understand what it means."

# Public Issues

Thinking of taking your company public? Craig McMillan, partner, assurance, at PricewaterhouseCoopers, and Peekaboo Beans founder and CEO Traci Costa, whose company is in the process of going public, walk you through it *by Felicity Stone*



## 1 ANALYZE YOUR REASONS FOR GOING PUBLIC

The main reason companies have an initial public offering (IPO) is access to capital. “I wanted to grow to a bigger scale,” says Costa, “so this gives me access to capital, but secondary to that I wanted to create a model in which my sales reps could become owners in the business.” Owners can also sell their shares as part of an exit strategy, and going public adds a bit of prestige and publicity that can have positive business outcomes, adds McMillan.

## 2 CONSIDER THE DRAWBACKS

“The costs of going public can get up there,” says Costa, noting that it also requires a lot of extra time while still running the business. And once the company is public, additional accounting and legal personnel will make it more expensive to operate—and a lot less private. “You’re putting your results out each quarter and the world can see what’s going on,” says McMillan. “You’ve also got to deal with the increased regulation that comes with operating a public company.”

## 5 THEN PROCEED—WITH PATIENCE

The core process of an IPO typically takes three or four months and involves filing a registration statement with the securities commission in the country in which you’re listing, says McMillan. The company’s management team and board plus investment bankers, accountants and lawyers work concurrently to get the prospectus filed and the listing complete.

While an IPO is the most common way of going public, Costa did a reverse takeover of an existing public company that had capital and a structure in place. It can shorten the process because the core company is already listed, says McMillan. “You’re just backing a private company into that public company.”

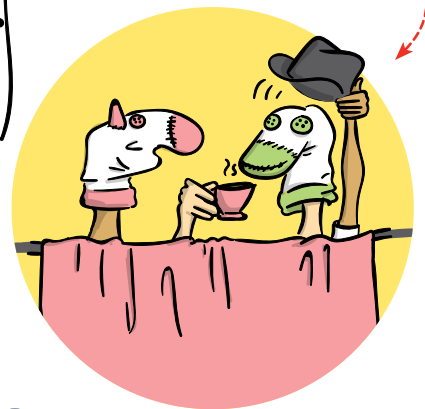


## 4 PAY ATTENTION TO TIMING

Make sure it’s the right time in terms of your revenue growth and ability to access capital, says Costa. It’s also important to understand that, from a market perspective, there are “windows of opportunity” when the IPO market is open in certain sectors, according to McMillan. “You need to find the right window of opportunity when there is an active investor base out there or institutions are wanting to make investments, and you’ve got to hit the ground at the right time.”

## 3 ACT THE PART

Ideally company owners should start thinking about going public a couple of years out, preparing themselves and operating like a public company, says McMillan. This could include developing the management team; developing a budget and measuring performance; appointing independent directors to the board; forming an audit committee and having financial statements audited; evaluating and implementing corporate governance practices; and building a positive public image.



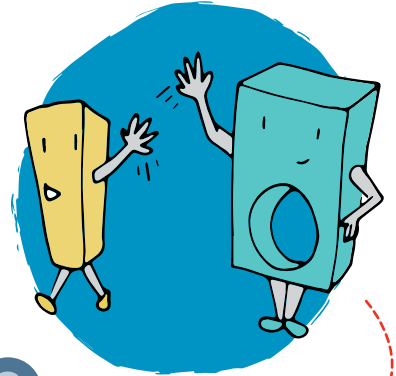
# Breaking Up Is Hard to Do

No one wants to lose a client, but sometimes working together just doesn't work out. Business development coach Pamela Chatry and GrowthPoint chair Robert Murray advise how to fire a customer without burning bridges *by Felicity Stone*



## 1 TALK IT OVER

The first thing is to listen, says Chatry. Understand and acknowledge the client's unhappiness, that there is a problem. "And then it's always good to ask that client, What do you see as a step here in resolving this? 'What would you like to have happen?'" she adds. "It still comes down to, are you going to end this on a bad note or are you going to end this on a good note?"



## 2 SAY GOODBYE

"Some people you'll never make happy," says Chatry. "You're better to say, I don't think this is working for you any more than this is working for me." It may simply be a bad fit and the client should never have been taken on in the first place. It's usually not a surprise to the client that it's not working out, notes Murray. "You have to look at that and say, this is a relationship that's failing and it needs to go."

## 3 BRING STAFF ON BOARD

Everybody has to understand the reason why, says Murray. "There might be really good revenue that comes from that customer but at what cost? If the organization is losing money on it and there's no strategic value to carrying on with that, and at the same time the relationship is causing the customer to be the worst form of advertising in the marketplace by spreading negative talk about you, what is the tangible value of that?"



## 4 CONSIDER TIMING

If the business owner sees a possibility of the relationship deteriorating, nip it in the bud early while it is still amicable, advises Chatry. She and Murray recommend first completing the current stage of the client's project. "We lost more money than we would have if we had made the change earlier, however we were in a place of integrity with the client by waiting," says Murray.

## 5 OFFER ALTERNATIVES

"If I'm going to terminate a client, I always give them names of others who do similar work to me and say, 'Perhaps there's a better fit?'" says Chatry. Murray invited his competitor to lunch with an about-to-be-former client and introduced them. "The client walked away from the meeting thinking, 'This is a classy organization that realizes they're not serving us well, but they found a solution for me,'" he says. "They didn't just walk away from it."





# Beyond Dispute

A disgruntled stakeholder can disrupt a business—and not in a good way. Blair Horn, partner at Fasken Martineau, and Vivienne Stewart, principal of Railtown Law, offer tips on how to avoid, and resolve, such discontent *by Felicity Stone*



## 1 COMMUNICATE

“It’s pretty much like any other relationship—communications are really important if you’re looking at keeping and promoting good business relationships among the directors, shareholders, family members and friends,” says Stewart. “If you’re not communicating with your stakeholders effectively, there will be a challenge at some point,” warns Horn. “Good, constructive, transparent communication will help you avoid a dispute and will certainly help you avoid being in a court or arbitration.”



## 2 GET AN AGREEMENT

A shareholder agreement establishes what the expected roles are for shareholders, directors and management, explains Horn. It would also address dispute resolution: what mechanisms there are to solve the dispute, or if somebody’s unhappy, how they sell their shares. “If you have shareholder agreements or partnership agreements in place or policies that would deal with whatever the issue is, then you can pull those out and go through the process and with any luck that will resolve the problem,” says Stewart.

## 5 MEDIATE, ARBITRATE OR GO TO COURT

“And in that order, you’re going from the simplest to the most complex—and cheapest to most expensive,” says Horn. “You’re not going to get a binding decision from a mediator; you can get a binding decision from an arbitrator; and you will get a binding decision from a court.” The mediation and arbitration process is confidential—unlike court, which is public, notes Stewart. She recommends Mediate BC, whose members have experience in different types of business and disputes.



## 4 TURN TO A THIRD PARTY

Having an independent director on the board might help prevent or resolve a dispute, says Horn. “Bringing the right independent expertise in when there is actually a dispute might help you get to a path on resolution.” Depending on the issue, that expert could be a technical advisor, a financial advisor, a governance specialist or legal help. Or even a therapist to do relationship counselling, suggests Stewart, since disputes often stem from personality conflicts.

## 3 BE REASONABLE

Be careful that you don’t ignore the stakeholders, says Horn. Even when they have less power or fewer financial resources, their interests still need to be addressed in a fair and even-handed way. “When you’re negotiating with somebody or even just resolving a dispute, acting in good faith is not just focusing on your own needs and your own desires but also considering where are they coming from,” says Stewart.

