

File No. 04-1000-20-2016-483

March 6, 2017

s.22(1)

Dear s.22(1)

Re: **Request for Access to Records under the Freedom of Information and Protection of Privacy Act (the "Act")**

I am responding to your request of December 16, 2016 for:

The contract, project plans, schedules, budgets, performance measures, terms of reference and/or mandate, key deliverables (such as reports, reviews or other feedback) and invoices related to the contract for goods and services performed in 2016 with Linda Oglov, as referenced in the Open Data Catalogue under consultants in the Mayor's Discretionary Budget and Expenses. I am seeking records for January 1, 2016 to December 16, 2016.


All responsive records are attached. Some information in the records has been severed, (blacked out), under s.15(1)(l) of the Act. You can read or download this section here: http://www.bclaws.ca/EPLibraries/bclaws_new/document/ID/freeside/96165_00

Under section 52 of the Act you may ask the Information & Privacy Commissioner to review any matter related to the City's response to your request. The Act allows you 30 business days from the date you receive this notice to request a review by writing to: Office of the Information & Privacy Commissioner, info@oipc.bc.ca or by phoning 250-387-5629.

If you request a review, please provide the Commissioner's office with: 1) the request number assigned to your request (#04-1000-20-2016-483); 2) a copy of this letter; 3) a copy of your original request for information sent to the City of Vancouver; and 4) detailed reasons or grounds on which you are seeking the review.

Please do not hesitate to contact the Freedom of Information Office at foi@vancouver.ca if you have any questions.

Yours truly,



Barbara J. Van Fraassen, BA
Director, Access to Information
City Clerk's Department, City of Vancouver
Email: Barbara.vanfraassen@vancouver.ca
Telephone: 604.873.7999

Encl.
:jb

INVOICE

October 19, 2016

Kevin Quinlan,
Chief of Staff,
Mayor's Office,
City of Vancouver

Re: Strategic planning & skills development with Katie Robb – 3 months

Fee	\$3,000
Plus GST @ 5% =	<u>150</u>
Total invoice	\$3,150

GST registration number: 871500427-RT0001

Payments by cheque to Oglov Business Development Inc. (address below) or e-transfer to linda@oglov.com

Or for Direct Deposit:

Please make payments to (Beneficiary)

Oglov Business Development Inc.,
2204 Paisley Road, Pender Island, BC V0N 2M1
linda@oglov.com

Correspondent (Intermediary) Bank:

Toronto Dominion Bank
55 King Street West
Toronto, Ontario M5K 1A2
Canada

Account Number at Intermediary Bank:

s.15(1)(l)

Beneficiary Bank SWIFT:

s.15(1)(l)

Beneficiary Bank:

Citizens Bank of Canada (Vancity),
401-815 West Hastings Street,
Vancouver, BC V6C 1B4

Beneficiary Account Number:

s.15(1)(l)

INVOICE

July 7, 2016

Attention: Dana Bertrand, Office Manager
Mayor's Office
City of Vancouver
453 West 12th Avenue
Vancouver, BC V5Y 1V4

Re: Team workshop and strategic planning session, including pre and post-session phone interviews

Fee	\$2,400
Plus GST @ 5% =	<u>120</u>
Total invoice	\$2,520

GST registration number: 871500427-RT0001

Payments by cheque to Oglov Business Development Inc. (address below) or e-transfer to linda@oglov.com

Or for Direct Deposit:

Please make payments to (Beneficiary)

Oglov Business Development Inc.,
2204 Paisley Road, Pender Island, BC VON 2M1
linda@oglov.com

Correspondent (Intermediary) Bank:

Toronto Dominion Bank
55 King Street West
Toronto, Ontario M5K 1A2
Canada

Account Number at Intermediary Bank:

s. 15(1)(l)

Beneficiary Bank SWIFT:

s. 15(1)(l)

Beneficiary Bank:

Citizens Bank of Canada (Vancity),
401-815 West Hastings Street,
Vancouver, BC V6C 1B4

Beneficiary Account Number:

s. 15(1)(l)

add by KO



OGLOV BUSINESS DEVELOPMENT INC.
2204 Paisley Road,
Pender Island, BC V0N2M1 Canada

O: 604.288.7031 M: 604.787.9829
E: linda@oglov.com
WWW.OGLOV.COM

INVOICE

Vendor # 120519

Invoice #: 15 - 87

December 22, 2015

Office of the Mayor,
City of Vancouver,
Vancouver, BC

ATTN: DANA BERTRAND

Re: Strategic planning services

Fee for services for 5 months -	\$14,250.00
Plus GST @ 5% -	<u>712.50</u>

TOTAL INVOICE \$14,962.50

GST registration number: 871500427-RT0001

Please make payments to

Oglov Business Development Inc.,
2204 Paisley Road, Pender Island, BC V0N 2M1
linda@oglov.com

For Direct Deposit:

Vancity Credit Union,
501 W. 10th Ave,
Vancouver, BC V5Z 1K9.

Transit:
Institution:
Account number:
Bank code:

s.15(1)(l)

OK'd by
A.M.

ni? et xatəmətəl, tə t̪nimət, tə təmæxʷ ʔi? tə kʷaʔkʷə 1 *

We watch over the land and sea and in turn they watch over us.

December 22, 2015

PRIVATE AND CONFIDENTIAL

Ms. Linda Oglov
Oglov Business Development Inc.

linda@oglov.com

Dear Linda:

Re: Consulting Agreement with Office of the Mayor, City of Vancouver

This will confirm our agreement that you will provide the services described in the schedule to this letter (the "Services") to the City of Vancouver for the period from December 1st, 2015 to December 1st, 2016 (the "Term") on the following terms and conditions:

- The City will pay to you the amount of \$15,000 (fifteen thousand dollars) which includes taxes. This is the maximum amount that the City is obliged to pay in respect of performance of the Services unless this letter agreement is amended in writing and signed by both you and the undersigned.
- You will provide the Services as an independent contractor and not as an employee of the City. You will not be entitled to any employment benefits of any kind, and you will be solely responsible for remittance of Canada Pension premiums, Employment Insurance premiums, income tax and any other taxes, based on the total remuneration payable to you under this letter agreement.
- You will submit your invoice in advance for the services.
- You acknowledge by signing this letter that, in performing the Services, you may acquire information about certain matters which are confidential and that such information is the exclusive property of the City and you agree not to disclose same to any third party either during or after the Term.

- All drawings, audio-visual materials, information, plans, models, designs, specifications, reports and other documents or products produced, received or acquired by you as a result of the provision of the Services (the "Material") will be the sole property of the City and the City will have the right to use all of the Material for its benefit in any way it sees fit, subject to third party owned copyright. You will deliver the Material to the City forthwith following the expiry of the Term. Title to Material created by you is to be considered to have been transferred, and any copyright in same is to be considered to have been assigned by you to the City, on creation of such Material. You irrevocably waive, in favour of the City, your moral rights in respect of Material created by you.

To confirm your agreement to the above terms and conditions, kindly sign the duplicate copy of this letter where indicated and return same to the Mayor's Office as soon as possible.

Sincerely,



Michael Magee
Chief of Staff

TERMS ACKNOWLEDGED AND AGREED TO THIS 22nd DAY OF DECEMBER 2015.



LINDA OGLOV



SERVICES REQUIRED:

Strategic Planning services, including:

- Facilitation of planning meetings and support to the Chief of Staff regarding business opportunities and work related to the Vancouver Economic Commission.
- Assistance to Chief of Staff for overall Strategic Objectives of the Mayor's Office.
- Event coordination.



Duane Elverum <duaneelverum@gmail.com>

**Accepted: Linda Oglov @ Thu May 19, 2016 12pm - 1pm
(duane.elverum@citystudiovancouver.com)**

1 message

linda@oglov.com <linda@oglov.com>
Reply-To: linda@oglov.com
To: duane.elverum@citystudiovancouver.com

Thu, May 5, 2016 at 6:54 PM

linda@oglov.com has accepted this invitation.

Linda Oglov

- When Thu May 19, 2016 12pm – 1pm Pacific Time - Vancouver
- Where CityStudio, 1800 Spyglass Pl, Vancouver, BC V5Z 4K7, Canada ([map](#))
- Video call https://plus.google.com/hangouts/_/citystudiovancouver.com/linda-oglov
- Calendar [duane.elverum@citystudiovancouver.com](#)
- Who
 - [duane.elverum@citystudiovancouver.com](#) - organizer
 - [janet.moore@citystudiovancouver.com](#)
 - [linda@oglov.com](#)

Invitation from [Google Calendar](#)

You are receiving this email at the account [duane.elverum@citystudiovancouver.com](#) because you are subscribed for invitation replies on calendar [duane.elverum@citystudiovancouver.com](#).

To stop receiving these emails, please log in to <https://www.google.com/calendar/> and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. [Learn More](#).

invite.ics
1K



Duane Elverum <duaneelverum@gmail.com>

**Accepted: Linda Oglov @ Wed Apr 20, 2016 4:30pm - 5:30pm
(duane.elverum@citystudiovancover.com)**

1 message

linda@oglov.com <linda@oglov.com>
Reply-To: linda@oglov.com
To: duane.elverum@citystudiovancover.com

Sat, Apr 16, 2016 at 9:08 AM

linda@oglov.com has accepted this invitation.

Linda Oglov

When Wed Apr 20, 2016 4:30pm – 5:30pm Newfoundland Time - St. Johns
Video call https://plus.google.com/hangouts/_/citystudiovancover.com/janet-moore
Calendar duane.elverum@citystudiovancover.com
Who
• duane.elverum@citystudiovancover.com - organizer
• linda@oglov.com

Invitation from Google Calendar

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invite.ics
1K



Duane Elverum <duaneelverum@gmail.com>

**Accepted: Linda Oglov Call @ Mon Mar 14, 2016 1:30pm - 2:30pm
(duane.elverum@citystudiovancouver.com)**

1 message

linda@oglov.com <linda@oglov.com>
Reply-To: linda@oglov.com
To: duane.elverum@citystudiovancouver.com

Mon, Mar 7, 2016 at 10:14 PM

linda@oglov.com has accepted this invitation.

Linda Oglov Call

When Mon Mar 14, 2016 1:30pm – 2:30pm Pacific Time - Vancouver
Video call https://plus.google.com/hangouts/_/citystudiovancouver.com/linda-oglov
Calendar duane.elverum@citystudiovancouver.com
Who
• duane.elverum@citystudiovancouver.com - organizer
• janet.moore@citystudiovancouver.com
• linda@oglov.com

Invitation from Google Calendar

You are receiving this email at the account duane.elverum@citystudiovancouver.com because you are subscribed for invitation replies on calendar duane.elverum@citystudiovancouver.com.

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Forwarding this invitation could allow any recipient to modify your RSVP response. [Learn More.](#)

invite.ics
1K



Duane Elverum <duaneelverum@gmail.com>

Accepted: Linda with Janet and Duane at CityStudio @ Thu Mar 31, 2016 9:30am - 10:30am (duane.elverum@citystudiovancouver.com)

1 message

linda@oglov.com <linda@oglov.com>
Reply-To: linda@oglov.com
To: duane.elverum@citystudiovancouver.com

Wed, Mar 23, 2016 at 9:39 AM

linda@oglov.com has accepted this invitation.

Linda with Janet and Duane at CityStudio

When Thu Mar 31, 2016 9:30am – 10:30am Pacific Time - Vancouver

Where 1800 Spyglass Place (map)

Video call https://plus.google.com/hangouts/_/citystudiovancouver.com/linda-with

Calendar duane.elverum@citystudiovancouver.com

- Who
- duane.elverum@citystudiovancouver.com - organizer
 - janet.moore@citystudiovancouver.com
 - linda@oglov.com

Invitation from Google Calendar

You are receiving this email at the account duane.elverum@citystudiovancouver.com because you are subscribed for invitation replies on calendar duane.elverum@citystudiovancouver.com.

To stop receiving these emails, please log in to <https://www.google.com/calendar/> and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. [Learn More.](#)

invite.ics
1K



Duane Elverum <duaneelverum@gmail.com>

change of time?

6 messages

Linda Oglov <linda@oglov.com>

Tue, Mar 1, 2016 at 4:23 PM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Hi Duane - would it work for you if we changed our call to tomorrow afternoon, anytime after 12:30? If not, we will leave it at 9:30. Thanks,
Linda



On Mar 1, 2016, at 11:00 AM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Sounds good Linda - thank you. If it helps the conversation, [here's](#) our Year 4 report for a an overview of our work to date, and our recent TEDx Vancouver [talk](#) for a wider context.

Talk soon,
D.

On Tue, Mar 1, 2016 at 6:25 AM, Linda Oglov <linda@oglov.com> wrote:

Confirmed Duane, thanks,
Linda

<unknown.png>

On Feb 29, 2016, at 8:08 PM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Hi Linda - how does this Wednesday at 9:30am sound? I'm at [604-734-1615](tel:604-734-1615).

Looking forward to chatting,
Duane

On Mon, Feb 29, 2016 at 2:58 PM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane - Mike Magee's office suggested that I reach out to you with respect to some business coaching which I am happy to do. You can find out more about me on my website below and I attach a short bio. Shall we start with a 20-30 min phone call to discuss what's going on with you and how I might help? Some good time slots for me: Tuesday 7:30-8:30; Wednesday 9-11 or after 1 pm; Thursday 10-4. Please let me know if there is a good time in there for a quick call and best number to reach you on. I look forward to it. Best regards,
Linda

Duane Elverum <duane.elverum@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>

Tue, Mar 1, 2016 at 4:26 PM

Hi Linda - I'm sorry but the rest of the day is packed until 2pm, but then Janet leaves to pick up her children.
Thursday 10am-11:30 window could work if helpful?

[Quoted text hidden]

linda@oglov.com <linda@oglov.com>
To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Tue, Mar 1, 2016 at 7:40 PM

Thanks Duane. Let's switch to 10 Thursday.

Linda Oglov
604-288-7031

On Mar 1, 2016, at 6:26 PM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

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Linda

Duane Elverum <duane.elverum@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>

Tue, Mar 1, 2016 at 8:44 PM

Hi Linda - apologies, I didn't notice that we need to travel between meetings - can we make it 10:30?

[Quoted text hidden]

linda@oglov.com <linda@oglov.com>
To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Wed, Mar 2, 2016 at 3:26 AM

No problem.

Linda Oglov
[604-288-7031](tel:604-288-7031)

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Wed, Mar 2, 2016 at 7:34 AM

Thanks Linda - talk soon.

D.

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

confirming address

3 messages

Linda Oglov <linda@oglov.com>

Tue, May 3, 2016 at 7:30 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

confirming you are in the building at foot of Spyglass, near the ferry, correct? Thanks,
Linda



Duane Elverum <duane.elverum@citystudiovancouver.com>

Tue, May 3, 2016 at 7:56 AM

To: Linda Oglov <linda@oglov.com>

Yes - look for a rocket in the window and ring the citystudio buzzer, or call my mobile - [604-734-1615](tel:604-734-1615)

See you soon,

D.

[Quoted text hidden]

Linda Oglov <linda@oglov.com>

Tue, May 3, 2016 at 8:29 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Just landed so running a touch late. Will be there as close to 9 as possible. Thanks.

Linda Oglov

[604-288-7031](tel:604-288-7031)

On May 3, 2016, at 7:56 AM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Yes - look for a rocket in the window and ring the citystudio buzzer, or call my mobile - [604-734-1615](tel:604-734-1615)

See you soon,

D.

On Tue, May 3, 2016 at 10:30 AM, Linda Oglov <linda@oglov.com> wrote:

confirming you are in the building at foot of Spyglass, near the ferry, correct? Thanks,

Linda

<Unknown.png>



Duane Elverum <duaneelverum@gmail.com>

connecting

7 messages

Linda Oglov <linda@oglov.com>

Mon, Feb 29, 2016 at 2:58 PM

To: duane.elverum@citystudiovancouver.com

Hi Duane - Mike Magee's office suggested that I reach out to you with respect to some business coaching which I am happy to do. You can find out more about me on my website below and I attach a short bio. Shall we start with a 20-30 min phone call to discuss what's going on with you and how I might help? Some good time slots for me: Tuesday 7:30-8:30; Wednesday 9-11 or after 1 pm; Thursday 10-4. Please let me know if there is a good time in there for a quick call and best number to reach you on. I look forward to it. Best regards,
Linda

2 attachments**unknown.png**
56K **Linda Oglov bio 2016.docx**
125K

Duane Elverum <duane.elverum@citystudiovancouver.com>

Mon, Feb 29, 2016 at 3:26 PM

To: Linda Oglov <linda@oglov.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Bcc: Duane Elverum <duane.elverum@gmail.com>

Hi Linda - it's so good to hear from you and to learn more about your work. Janet and I will look at our calendars and confirm a time by tomorrow.

Talk soon,
Duane

On Mon, Feb 29, 2016 at 2:58 PM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane - Mike Magee's office suggested that I reach out to you with respect to some business coaching which I am happy to do. You can find out more about me on my website below and I attach a short bio. Shall we start with a 20-30 min phone call to discuss what's going on with you and how I might help? Some good time slots for me: Tuesday 7:30-8:30; Wednesday 9-11 or after 1 pm; Thursday 10-4. Please let me know if there is a good time in there for a quick call and best number to reach you on. I look forward to it. Best regards,
Linda

Janet Moore <janet.moore@citystudiovancouver.com>

City of Vancouver FOI Request #2016-483

Mon, Feb 29, 2016 at 4:37 PM
15 of 107

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Wed 9:30?

Janet Moore

Director SFU Semester in Dialogue

Co-Director, CityStudio Vancouver

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>

Mon, Feb 29, 2016 at 6:08 PM

To: Linda Oglov <linda@oglov.com>

Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

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Looking forward to chatting,

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Linda

Linda Oglov <linda@oglov.com>

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To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Confirmed Duane, thanks,

Linda



[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>

Tue, Mar 1, 2016 at 9:00 AM

To: Linda Oglov <linda@oglov.com>

Sounds good Linda - thank you. If it helps the conversation, [here's](#) our Year 4 report for a an overview of our work to date, and our recent TEDx Vancouver [talk](#) for a wider context.

Talk soon,

D.

[Quoted text hidden]

Linda Oglov <linda@oglov.com>

Tue, Mar 1, 2016 at 9:01 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

City of Vancouver FOI Request #2016-483

16 of 107

Perfect, very helpful thanks Duane.



On Mar 1, 2016, at 11:00 AM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Sounds good Linda - thank you. If it helps the conversation, [here's](#) our Year 4 report for a an overview of our work to date, and our recent TEDx Vancouver talk for a wider context.

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<unknown.png>

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Linda



Duane Elverum <duaneelverum@gmail.com>

Draft scope of work doc

4 messages

Duane Elverum <duaneelverum@gmail.com> Thu, Apr 21, 2016 at 2:18 PM
Reply-To: DuaneElverum@gmail.com
To: Linda Oglov <linda@oglov.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Hi Linda,
Here is the draft scope attached as a doc. I've also shared a gdoc with you if preferred.

Much appreciated,
Duane

--
Duane Elverum

Co-Founder and Co-Director
CityStudio Vancouver
604.874.6401

Our current [Video](#) and [Year 4 Annual Report](#)



DraftScopeofWorkCityStudioStrategicBusinessDevelopmentPlan.pdf
315K

Linda Oglov <linda@oglov.com> Thu, Apr 21, 2016 at 4:09 PM
To: DuaneElverum@gmail.com
Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Thanks Duane and Janet - will get back to you asap.
Linda



[Quoted text hidden]

[Quoted text hidden]
<DraftScopeofWorkCityStudioStrategicBusinessDevelopmentPlan.pdf>

Linda Oglov <linda@oglov.com>
To: DuaneElverum@gmail.com
Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Mon, Apr 25, 2016 at 6:14 AM

Hi again Duane and Janet - I have had a quick look at the document but I would like to spend a proper amount of time shaping it and realistically I won't get to that until Wednesday this week since I am now into running a corporate retreat today and Tuesday. Back to you then, thanks,
Linda



[Quoted text hidden]

[Quoted text hidden]

<DraftScopeofWorkCityStudioStrategicBusinessDevelopmentPlan.pdf>

Duane Elverum <duaneelverum@gmail.com>
Reply-To: DuaneElverum@gmail.com
To: Linda Oglov <linda@oglov.com>
Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Mon, Apr 25, 2016 at 7:58 AM

Thanks Linda - we look forward to your feedback.
D.

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

half hour call tomorrow please

3 messages

Linda Oglov <linda@oglov.com>

Wed, May 18, 2016 at 3:25 PM

To: Elverum Duane <duane.elverum@citystudiovancouver.com>, Janet Moore <janet.moore@citystudiovancouver.com>

Hi Duane and Janet - looking forward to speaking to you tomorrow and your update! It will need to be a call (I will be on my office line [604-288-7031](tel:604-288-7031)) and I am afraid I will just have a half hour (12-12:30) since I have something else that I will need to get on to. So in order to be efficient with your time and mine, may I suggest that one or both of you send me a brief update by email prior to the meeting with response to:

1. Any salient overall updates on the project since last we spoke.
2. Business plan development - any decisions? Have you engaged with David (think I have his name right)? Other action?
3. Current thoughts on timeline for above?
4. Thoughts on how best, and for what period of time, you might want to engage my assistance going forward. We can discuss this on the call but thought I would suggest you think and talk on it. As you would appreciate, I feel an obligation to the Mayor's office, which is paying for my time, to ensure the time I use is well spent and of benefit to you. There have recently been other requests of my time from the Mayor's office and I need to allocate appropriately.

Thanks both - as ever, I look forward to my time with you tomorrow!

Linda



Janet Moore <janet.moore@citystudiovancouver.com>

Thu, May 19, 2016 at 11:31 AM

To: Linda Oglov <linda@oglov.com>

Cc: Elverum Duane <duane.elverum@citystudiovancouver.com>

Hi Linda;

Here are a few updates:

We have moved forward with David Lee and have negotiated deadlines and deliverables. We start working next week with him.

Our needs are to create a transition strategy towards the NFP and managing staff roles. We have a challenge relating to our current Ops Manager who we don't see in the future Managing Director role - how do we navigate this transition in the next few months.

Talk soon;

Janet and Duane

Janet Moore
Director [SFU Semester in Dialogue](#)

Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Linda Oglov <linda@oglov.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Elverum Duane <duane.elverum@citystudiovancouver.com>

Thu, May 19, 2016 at 12:02 PM

Thanks Janet. Pls call me when you are ready on [604-288-7031](tel:604-288-7031)



On 2016-05-19, at 11:31 AM, Janet Moore wrote:

Hi Linda;

Here are a few updates:

We have moved forward with David Lee and have negotiated deadlines and deliverables. We start working next week with him.

Our needs are to create a transition strategy towards the NFP and managing staff roles. We have a challenge relating to our current Ops Manager who we don't see in the future Managing Director role - how do we navigate this transition in the next few months.

Talk soon;

Janet and Duane

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

On Wed, May 18, 2016 at 3:25 PM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane and Janet - looking forward to speaking to you tomorrow and your update! It will need to be a call (I will be on my office line [604-288-7031](tel:604-288-7031)) and I am afraid I will just have a half hour (12-12:30) since I have something else that I will need to get on to. So in order to be efficient with your time and mine, may I suggest that one or both of you send me a brief update by email prior to the meeting with response to:

1. Any salient overall updates on the project since last we spoke.
2. Business plan development - any decisions? Have you engaged with David (think I have his name right)? Other action?
3. Current thoughts on timeline for above?
4. Thoughts on how best, and for what period of time, you might want to engage my assistance going forward. We can discuss this on the call but thought I would suggest you think and talk on it. As you would appreciate, I feel an obligation to the Mayor's office, which is paying for my time, to ensure the time I use is well spent and of benefit to you. There have recently been other requests of my time from the Mayor's office and I need to allocate appropriately.

Thanks both - as ever, I look forward to my time with you tomorrow!
City of Vancouver FOI Request #2016-483

21 of 107

1/18/2017

Gmail - half hour call tomorrow please

Linda

<unknown.png>



Duane Elverum <duaneelverum@gmail.com>

in person meeting May 3?

3 messages

Linda Oglov <linda@oglov.com>

Wed, Apr 27, 2016 at 3:59 PM

To: Duane Elverum <duane.elverum@citystudiovancover.com>, "janet.moore@citystudiovancover.com Moore" <janet.moore@citystudiovancover.com>

Hi Duane and Janet - I am in between my two retreats! I plan on sending you some thoughts on scope of work tomorrow morning from my ferry ride. Meanwhile I do have a possibility of meeting in person on morning of Tuesday May 2 9-10 am at your offices - would that work? If so, please just send meeting invite. Thanks,
Linda



Linda Oglov <linda@oglov.com>

Wed, Apr 27, 2016 at 4:00 PM

To: Duane Elverum <duane.elverum@citystudiovancover.com>, "janet.moore@citystudiovancover.com Moore" <janet.moore@citystudiovancover.com>

Sorry that should be Tuesday May 3.
LO

Hi Duane and Janet - I am in between my two retreats! I plan on sending you some thoughts on scope of work tomorrow morning from my ferry ride. Meanwhile I do have a possibility of meeting in person on morning of Tuesday May 2 9-10 am at your offices - would that work? If so, please just send meeting invite. Thanks,
Linda



Duane Elverum <duane.elverum@citystudiovancover.com>

Wed, Apr 27, 2016 at 4:02 PM

To: Linda Oglov <linda@oglov.com>

Cc: Duane Elverum <duane.elverum@citystudiovancover.com>, "janet.moore@citystudiovancover.com Moore" <janet.moore@citystudiovancover.com>

Works for me. Janet?

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

Mtg Mar 31

2 messages

Linda Oglov <linda@oglov.com>

Wed, Mar 23, 2016 at 9:32 AM

To: Elverum Duane <duane.elverum@citystudiovancouver.com>

Hi Duane - if you still want to meet in person morning of Mar 31 pls send meeting invite. I think we said 9:30 at your office.
Still working on resources for you. Thanks
Linda

Linda Oglov
[604-288-7031](tel:604-288-7031)

Duane Elverum <duane.elverum@citystudiovancouver.com>

Wed, Mar 23, 2016 at 9:37 AM

To: Linda Oglov <linda@oglov.com>

Invite on the way - Thanks Linda - see you then.
D.

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

Number

1 message

Linda Oglov <linda@oglov.com>

Wed, Apr 20, 2016 at 12:01 PM

To: Elverum Duane <duane.elverum@citystudiovancouver.com>

[604-787-9829](tel:604-787-9829) when ready

Linda Oglov
[604-288-7031](tel:604-288-7031)



Duane Elverum <duaneelverum@gmail.com>

possible fundraiser

3 messages

Linda Oglov <linda@oglov.com>

Wed, Mar 30, 2016 at 7:21 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>, janet.moore@citystudiovancouver.com

Hi Duane and Janet - ahead of our meeting tomorrow, attached is a resume of an experienced fundraiser who is highly recommended by some colleagues of mine. He is currently looking for a contract position - not sure about range of compensation. To be discussed. Thanks,
Linda

2 attachments**unknown.png**
56K **markmahlresume-current.docx**
37K**Duane Elverum** <duane.elverum@citystudiovancouver.com>

Wed, Mar 30, 2016 at 7:54 AM

To: Linda Oglov <linda@oglov.com>

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Thanks for this Linda.

We're looking forward to meeting tomorrow. Are you still ok to meet at the [studio](#)? Please call my mobile at [604-734-1615](tel:604-734-1615) if you have any trouble finding us.

D.

[Quoted text hidden]

Linda Oglov <linda@oglov.com>

Wed, Mar 30, 2016 at 7:57 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Yes see you tomorrow at 9:30 at Spyglass. Looking forward to meeting you both in person.

Linda

Linda Oglov
[604-288-7031](tel:604-288-7031)

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

Re: Invitation: Linda with Janet and Duane at CityStudio @ Thu Mar 31, 2016 9:30am - 10:30am (linda@oglov.com)

1 message

Linda Oglov <linda@oglov.com>
To: duane.elverum@citystudiovancover.com
Cc: janet.moore@citystudiovancover.com

Wed, Mar 23, 2016 at 9:39 AM

Thanks Duane and Janet - Happy Easter!
Linda



On 2016-03-23, at 9:37 AM, duane.elverum@citystudiovancover.com wrote:

Linda with Janet and Duane at CityStudio

[more details »](#)

When Thu Mar 31, 2016 9:30am – 10:30am Pacific Time - Vancouver
Where 1800 Spyglass Place (map)
Video call https://plus.google.com/hangouts/_/citystudiovancover.com/linda-with
Calendar linda@oglov.com
Who

- duane.elverum@citystudiovancover.com - organizer
- janet.moore@citystudiovancover.com
- linda@oglov.com

Going? **Yes** - **Maybe** - **No** [more options »](#)

Invitation from Google Calendar

You are receiving this email at the account linda@oglov.com because you are subscribed for invitations on calendar linda@oglov.com.

To stop receiving these emails, please log in to <https://www.google.com/calendar/> and change your notification settings for this calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. [Learn More](#).

<Mail Attachment.ics><invite.ics>



Duane Elverum <duaneelverum@gmail.com>

Re: Linda Oglov - Invitation to collaborate

1 message

Linda Oglov <linda@oglov.com>

Fri, Mar 4, 2016 at 12:36 PM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Thanks Duane. I will check this out and respond to you early next week when I am back in Vancouver. Best regards,
Linda



On Mar 4, 2016, at 1:21 PM, Duane Elverum (via Google Drive) <drive-shares-noreply@google.com> wrote:

Duane Elverum has invited you to **contribute to** the following shared folder:

 [Linda Oglov](#)



Hi Linda,

Here are 2 documents to start:

- 1) the summary orientation planning package for our advisors - Al E., Lauren D. and Ees Santos-Brault
- 2) A summary of consultant's work with our progress comments

If you need anything else to for now please don't hesitate to reach out.
Looking forward to meeting in person.

All the best,
Duane

[Open](#)

Google Drive: Have all your files within reach from any device.





Duane Elverum <duaneelverum@gmail.com>

RFP template for Business Development Plan

8 messages

Linda Oglov <linda@oglov.com>

Thu, Apr 7, 2016 at 11:51 AM

To: Duane.elverum@citystudiovancouver.com, janet.moore@citystudiovancouver.com

Hi Duane and Janet - further to our discussion on an RFP for a consultant to develop a Business Plan for City Studio, I attach an example of an RFP template (please hold in confidence, not to be shared with others since this is from a client of a few years ago). I don't suggest that you need to be quite this extensive, although the main body of the RFP is really just the first 10 pages and it covers the types of things typically found in such a request. Please let me know if this type of format works for you? If so, I would be pleased to provide input into the equivalent of what in this RFP is sections 4-10. Thanks and let me know when you want to set another call?

Linda

2 attachments

**Unknown.png**
56K **Example of FINAL RFP Version.June.17 (1).pdf**
8108K

Duane Elverum <duane.elverum@citystudiovancouver.com>

Sat, Apr 9, 2016 at 11:04 AM

To: Linda Oglov <linda@oglov.com>

Cc: "duane.elverum@citystudiovancouver.com" <Duane.elverum@citystudiovancouver.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Thanks for this Linda. We had a very good meeting with our advisors this past Thursday, bringing much of our recent calls into the discussion. Derek Ballantyne was with us as well, which was very helpful as you can imagine. I think our next call will seek to bring a few clear actions to ground.

We're off to Corner Brook this coming week, so maybe we could set up a call for the week of the 18th?

Janet can you suggest some times that work for you?

Talk soon,
D.

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>

Sat, Apr 9, 2016 at 1:42 PM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Cc: Linda Oglov <linda@oglov.com>

Hi Linda;

Please let us know what dates would work for an in person meeting or a phone call. Wed. the 20th looks quite good from 9-2. Tuesday 19 and Thursday 21 at 9:30 are open for calls. Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Linda Oglov <linda@oglov.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Tue, Apr 12, 2016 at 6:09 PM

Thanks both. How about a call on Wed April 20 at 9 am?
Linda



[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Wed, Apr 13, 2016 at 9:02 AM

I would say yes to this call and we can have our scope of work ready to discuss. The next meeting will need to be in person? Does that work for you?

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>, Duane Elverum <duane.elverum@citystudiovancouver.com>

Sat, Apr 16, 2016 at 4:02 AM

How about 12-1pm on Wed April 20? Fingers crossed :) Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

On Wed, Apr 13, 2016 at 8:34 PM, Linda Oglov <linda@oglov.com> wrote:

I am pretty free on Wed April 20 except for 10-10:30 and 3-4 pm so please let me know if there is another time that day? Thanks,
Linda



On Apr 13, 2016, at 10:43 AM, Janet Moore <janet.moore@citystudiovancouver.com> wrote:

That time is not free- is there another option?

On Tuesday, 12 April 2016, Linda Oglov <linda@oglov.com> wrote:

Thanks both. How about a call on Wed April 20 at 9 am?
Linda

<unknown.png>

On Apr 9, 2016, at 1:42 PM, Janet Moore <janet.moore@citystudiovancouver.com> wrote:

Hi Linda;

Please let us know what dates would work for an in person meeting or a phone call. Wed. the 20th looks quite good from 9-2. Tuesday 19 and Thursday 21 at 9:30 are open for calls. Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

On Sat, Apr 9, 2016 at 11:04 AM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Thanks for this Linda. We had a very good meeting with our advisors this past Thursday, bringing much of our recent calls into the discussion. Derek Ballantyne was with us as well, which was very helpful as you can imagine. I think our next call will seek to bring a few clear actions to ground.

We're off to Corner Brook this coming week, so maybe we could set up a call for the week of the 18th?

Janet can you suggest some times that work for you?

Talk soon,
D.

On Thu, Apr 7, 2016 at 11:51 AM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane and Janet - further to our discussion on an RFP for a consultant to develop a Business Plan for City Studio, I attach an example of an RFP template (please hold in confidence, not to be shared with others since this is from a client of a few years ago). I don't suggest that you need to be quite this extensive, although the main body of the RFP is really just the first 10 pages and it covers the types of things typically found in such a request. Please let me know if this type of format works for you? If so, I would be pleased to provide input into the equivalent of what in this RFP is sections 4-10. Thanks and let me know when you want to set another call?
Linda

--

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

Linda Oglov <linda@oglov.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Sat, Apr 16, 2016 at 8:38 AM

Yes that works for me if it is good for Duane, please just send a calendar invite for that time. Thanks!
Linda



On 2016-04-16, at 4:02 AM, Janet Moore wrote:

How about 12-1pm on Wed April 20? Fingers crossed :) Janet

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

On Wed, Apr 13, 2016 at 8:34 PM, Linda Oglov <linda@oglov.com> wrote:

I am pretty free on Wed April 20 except for 10-10:30 and 3-4 pm so please let me know if there is another time that day? Thanks,
Linda

<unknown.png>

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>

Sat, Apr 16, 2016 at 8:42 AM

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Excellent - works for all. Calendar invite on its way. Janet

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

scope of work for consultant

3 messages

Linda Oglov <linda@oglov.com>

Wed, May 4, 2016 at 12:27 PM

To: Elverum Duane <duane.elverum@citystudiovancouver.com>, Janet Moore <janet.moore@citystudiovancouver.com>

Hi Janet and Duane - great to meet you both in person yesterday! As promised, attached is a draft scope of work for a consultant to develop your business plan. Happy to take any questions by email and I would be available for another call on Wednesday May 11 or anytime after that. Thanks,
Linda

2 attachments**unknown.png**
56K **Scope of work for consultant to develop business plan LO_May4_2016.docx**
125K

Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, May 5, 2016 at 2:54 PM

To: Linda Oglov <linda@oglov.com>

Cc: Elverum Duane <duane.elverum@citystudiovancouver.com>, Janet Moore <janet.moore@citystudiovancouver.com>

Thanks Linda - this is very clear and helpful. We'll let you know what we hear. Janet is away until the 16th - should we try for the 18? Earliest would be 9:30am. Or the 19th any time after 12pm?

Would you be able to pass on an example of a 1-page business plan?

Much appreciated,
Duane

[Quoted text hidden]

Linda Oglov <linda@oglov.com>

Thu, May 5, 2016 at 4:18 PM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Thanks Duane. Yes May 19 afternoon is open so pls send calendar invite for what works for you and Janet. I am in Ontario until May 10 but will scan and send example of one page biz plan once I have approval of client and I am back.
Linda

Linda Oglov
[604-288-7031](tel:604-288-7031)

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

setting up a call

4 messages

Linda Oglov <linda@oglov.com>

Mon, Mar 7, 2016 at 8:22 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>, janet.moore@citystudiovancouver.com

Hi Duane and Janet - thanks so much for sending through such a comprehensive package of information on CityStudio. I have a few questions that I will pose and in order to keep the momentum going I wonder if you would like to set a 30-45 min call for Friday Mar 11 at 8:30 or 9? Otherwise the rest of this week is pretty full and we would have to look at Mon or Tues March 14-15 next week both of which are fairly flexible. I will look to meet you in person soon but at the moment, phone calls will work best. Thanks,
Linda

**Janet Moore** <janet.moore@citystudiovancouver.com>

Mon, Mar 7, 2016 at 8:29 AM

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Friday at 9 works for me.

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>

Mon, Mar 7, 2016 at 3:12 PM

To: Linda Oglov <linda@oglov.com>

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Hi Linda,
Can we try:

- Monday the 14th between 1:30-2:30, or
- Tuesday the 15th between 9:30-11:30?

(FYI Janet, Jenn has OK'd the shift on Monday to accommodate if needed)

Thanks,
D.

On Mon, Mar 7, 2016 at 8:22 AM, Linda Oglov <linda@oglov.com> wrote:

[Quoted text hidden]

Mon, Mar 7, 2016 at 6:52 PM

Linda Oglov <linda@oglov.com>

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Thanks Duane. Please send a calendar invite for the time slot on Monday that works for you.
Linda



On Mar 7, 2016, at 3:12 PM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

Hi Linda,
Can we try:

- Monday the 14th between 1:30-2:30, or
- Tuesday the 15th between 9:30-11:30?

(FYI Janet, Jenn has Ok'd the shift on Monday to accommodate if needed)

Thanks,
D.

On Mon, Mar 7, 2016 at 8:22 AM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane and Janet - thanks so much for sending through such a comprehensive package of information on CityStudio. I have a few questions that I will pose and in order to keep the momentum going I wonder if you would like to set a 30-45 min call for Friday Mar 11 at 8:30 or 9? Otherwise the rest of this week is pretty full and we would have to look at Mon or Tues March 14-15 next week both of which are fairly flexible. I will look to meet you in person soon but at the moment, phone calls will work best. Thanks,
Linda

<unknown.png>



Duane Elverum <duaneelverum@gmail.com>

sorry will have to meet by phone

5 messages

Linda Oglov <linda@oglov.com>

Thu, Mar 31, 2016 at 6:36 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>, janet.moore@citystudiovancouver.com

Hi Duane and Janet - unfortunately something has come up which means I cannot meet in person today. I could meet this morning by phone, but would prefer to start at 9 am if that works? Otherwise I could do a half hour 9:30-10 or we could reschedule a call for next week any day that works for you. I am then in the city again April 12-13 to meet in person if you wish. Would be great to at least touch base by phone today if you can but let me know what works. I will be on my cell 604-787-9829. Thanks,
Linda



Janet Moore <janet.moore@citystudiovancouver.com>

Thu, Mar 31, 2016 at 7:01 AM

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

I can do 9am at the Studio by phone. Does that work for you?

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, Mar 31, 2016 at 7:20 AM

To: Janet Moore <janet.moore@citystudiovancouver.com>

yes

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, Mar 31, 2016 at 7:23 AM

To: Linda Oglov <linda@oglov.com>

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>, "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

9am by phone works Linda. We'll call then.

Talk soon,
D.

On Thu, Mar 31, 2016 at 6:36 AM, Linda Oglov <linda@oglov.com> wrote:

[Quoted text hidden]

Linda Oglov <linda@oglov.com>

City of Vancouver FOI Request #2016-483

Thu, Mar 31, 2016 at 8:02 AM

1/18/2017

Gmail - sorry will have to meet by phone

To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Cc: "janet.moore@citystudiovancouver.com" <janet.moore@citystudiovancouver.com>

Thanks. Speak then.

Linda Oglov
604-288-7031

On Mar 31, 2016, at 7:23 AM, Duane Elverum <duane.elverum@citystudiovancouver.com> wrote:

9am by phone works Linda. We'll call then.

Talk soon,
D.

On Thu, Mar 31, 2016 at 6:36 AM, Linda Oglov <linda@oglov.com> wrote:

Hi Duane and Janet - unfortunately something has come up which means I cannot meet in person today. I could meet this morning by phone, but would prefer to start at 9 am if that works? Otherwise I could do a half hour 9:30-10 or we could reschedule a call for next week any day that works for you. I am then in the city again April 12-13 to meet in person if you wish. Would be great to at least touch base by phone today if you can but let me know what works. I will be on my cell 604-787-9829. Thanks,
Linda

<unknown.png>



Duane Elverum <duaneelverum@gmail.com>

thoughts on Draft Scope of Work

8 messages

Linda Oglov <linda@oglov.com>

Thu, Apr 28, 2016 at 8:48 AM

To: Duane Elverum <duane.elverum@citystudiovancouver.com>, Janet Moore <janet.moore@citystudiovancouver.com>

Hi Duane and Janet - I had a chance to spend a bit more time reviewing the Draft Scope of Work you sent me and came up with more questions than suggestions on reworking it. You did a good job on laying out the upfront part that describes City Studio etc but we need to drill down a bit more on the Needs and Deliverables section as well as adding a timeline, etc. I took those two sections out of where you had them and moved them to the end and added some questions. I think I you should see that in the Google docs Dropbox file (I am not great with that) but I also attach the document with those changes.

Having said that, here are some thoughts on approach that we can discuss when we meet:

- First, having said that I did not want to take on this piece of work, I find myself being drawn into it! Truth is that I could do the plan for you quite easily and I think I am gaining a deeper understanding of how the two of you work and where the division of labour might be. So one option for our discussion could be that I would undertake to write the 3-Year Plan, with your input and involving someone else who would work under my direction. My fees are at the higher end of your available budget but I would commit to doing it for the \$20,000 in total. We can discuss timing, but I have more time towards the end of June and into July and could see completion by mid to late July.
- Second option, which could be a cheaper option, would be to proceed with the RFP in which case I would suggest we need to tighten up the sections noted above as well as confirm a short list of possible bidders.

At any rate, let's have an open discussion when we meet to consider which is best option. I have held the 9-10 am slot on Tuesday May 3 and I know it works for Duane. Hoping that time works for Janet as well? Please send calendar invite when you can confirm. Thanks,
Linda

2 attachments



unknown.png
56K

Draft Scope of Work: CityStudio Strategic Business Development Plan - Google Docs.html
405K

Janet Moore <janet.moore@citystudiovancouver.com>

Thu, Apr 28, 2016 at 7:52 PM

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

I could make the 9-10 slot but need to juggle a few other things. - is 9am ok? Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

Duane Elverum <duane.elverum@citystudiovancouver.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>

Thu, Apr 28, 2016 at 8:40 PM

Yup

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, Apr 28, 2016 at 8:45 PM

I can arrange this but don't think I want to work with her on this - given the Pender Island issue - I'm much more inclined to work with David Lee...to be discussed

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
To: Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, Apr 28, 2016 at 8:46 PM

can you open her doc?

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

[Quoted text hidden]

linda@oglov.com <linda@oglov.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Thu, Apr 28, 2016 at 10:00 PM

Hi Janet - yes I can confirm that I can meet with you and Duane at 9 am on Tuesday. Might be able to get there by 8:45 which would give us a bit more time. Pls confirm if that works. Thanks
Linda

Linda Oglov
604-288-7031

On Apr 28, 2016, at 8:48 PM, Janet Moore <janet.moore@citystudiovancouver.com> wrote:

Hi Linda;

I'll have to juggle some other meetings - so please let me know if you are confirmed to be in Vancouver on Tuesday at 9am. I will have to leave at 10:10 in order to get to SFU for a 10:30. Janet

Janet Moore
Director SFU Semester in Dialogue
Co-Director, CityStudio Vancouver

On Thu, Apr 28, 2016 at 8:48 AM, Linda Oglov <linda@oglov.com> wrote:

[Quoted text hidden]

Janet Moore <janet.moore@citystudiovancouver.com>
To: Linda Oglov <linda@oglov.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Fri, Apr 29, 2016 at 5:17 AM

Great. I can get there at 8:45. Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

[Quoted text hidden]

linda@oglov.com <linda@oglov.com>
To: Janet Moore <janet.moore@citystudiovancouver.com>
Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

Fri, Apr 29, 2016 at 5:35 AM

Should work. My float plane lands at YVR south terminal about 8:15-8:30 so I will come directly there and be there as close to 8:45 as I can. Thanks

Linda

Linda Oglov
[604-288-7031](tel:604-288-7031)

[Quoted text hidden]



Duane Elverum <duaneelverum@gmail.com>

Tuesday at 8:45

2 messages

Janet Moore <janet.moore@citystudiovancouver.com>

Mon, May 2, 2016 at 9:28 AM

To: Linda Oglov <linda@oglov.com>, Duane Elverum <duane.elverum@citystudiovancouver.com>

Hi Linda;

I've just returned from Toronto and I've learned that my husband is flying to Calgary - so I need to drop my kids at school Tuesday - I can only get there by 9. If we can shift back to 9:00 for the meeting start that would be great. Janet

Janet Moore
Director [SFU Semester in Dialogue](#)
Co-Director, [CityStudio Vancouver](#)

Linda Oglov <linda@oglov.com>

Mon, May 2, 2016 at 9:29 AM

To: Janet Moore <janet.moore@citystudiovancouver.com>

Cc: Duane Elverum <duane.elverum@citystudiovancouver.com>

No worries - we can easily meet from 9 until 10:10 and make it work!



[Quoted text hidden]



Calendar



6 results for **linda oglov**



CREATE

January 2017

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

My calendars

- Duane Elverum
- CityStudio Projects C...
- CS Vacation
- Duane Personal
- Fall 2016 Semester a...

Thu Mar 3, 2016

10:30am – 11:00am

+ **call w Linda Oglov** - Linda to call 604-734-1615

Mon Mar 14, 2016

1:30pm – 2:30pm

+ **Linda Oglov Call**

Thu Mar 31, 2016

9:30am – 10:30am

+ **Linda with Janet and Duane at CityStudio** - 1800 Spyglass Place

Wed Apr 20, 2016

12:00pm – 1:00pm

+ **Linda Oglov**

Tue May 3, 2016

9:00am – 10:10am

+ **Mtg w Linda, Janet and Duane** - In person at Spyglass office

Thu May 19, 2016

12:00pm – 1:00pm

+ **Linda Oglov** - CityStudio, 1800 Spyglass Pl, Vancouver, BC V5Z 4K7, Canada

From: linda@oglov.com

To: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

Date: 9/29/2016 2:45:12 PM

Subject: Accepted: Call Linda O and Kevin @ Fri Oct 28, 2016 8am - 8:30am (PDT)
(linda@oglov.com)

Attachments: invite.ics

linda@oglov.com has accepted this invitation.

Call Linda O and Kevin

When Fri Oct 28, 2016 8am – 8:30am Pacific Time - Vancouver

Calendar linda@oglov.com

Who • Quinlan, Kevin - organizer

• linda@oglov.com - creator

Invitation from Google Calendar <<https://www.google.com/calendar/>>

You are receiving this courtesy email at the account kevin.quinlan@vancouver.ca because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More <<https://support.google.com/calendar/answer/37135#forwarding>> .

From: linda@oglov.com

To: "Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>

Date: 9/29/2016 2:44:50 PM

Subject: Accepted: Call Linda O and Kevin @ Fri Oct 7, 2016 4pm - 4:30pm (PDT)
(linda@oglov.com)

Attachments: invite.ics

linda@oglov.com has accepted this invitation.

Call Linda O and Kevin

When Fri Oct 7, 2016 4pm – 4:30pm Pacific Time - Vancouver

Where She will call you (map <<https://maps.google.com/maps?q=She+will+call+you&hl=en>>)

Calendar linda@oglov.com

Who • Quinlan, Kevin - organizer

• linda@oglov.com - creator

Invitation from Google Calendar <<https://www.google.com/calendar/>>

You are receiving this courtesy email at the account kevin.quinlan@vancouver.ca because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More <<https://support.google.com/calendar/answer/37135#forwarding>> .

From: linda@oglov.com

To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>

Date: 10/11/2016 10:25:59 AM

Subject: Accepted: Call Linda O and Kevin @ Thu Oct 13, 2016 8am - 8:30am (PDT)
(linda@oglov.com)

Attachments: [invite.ics](#)

linda@oglov.com has accepted this invitation.

Call Linda O and Kevin

When Thu Oct 13, 2016 8am – 8:30am Pacific Time - Vancouver

Calendar linda@oglov.com

Who • [Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca) - organizer

• linda@oglov.com - creator

Invitation from Google Calendar <<https://www.google.com/calendar/>>

You are receiving this courtesy email at the account kevin.quinlan@vancouver.ca because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More <<https://support.google.com/calendar/answer/37135#forwarding>> .

From: linda@oglov.com

To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>

Date: 9/29/2016 2:45:01 PM

Subject: Accepted: Call Linda O and Kevin @ Thu Oct 20, 2016 9am - 9:30am (PDT)
(linda@oglov.com)

Attachments: invite.ics

linda@oglov.com has accepted this invitation.

Call Linda O and Kevin

When Thu Oct 20, 2016 9am – 9:30am Pacific Time - Vancouver

Calendar linda@oglov.com

Who • [Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca) - organizer

• linda@oglov.com - creator

Invitation from Google Calendar <<https://www.google.com/calendar/>>

You are receiving this courtesy email at the account kevin.quinlan@vancouver.ca because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More <<https://support.google.com/calendar/answer/37135#forwarding>> .

From: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

To: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

Date: 4/9/2014 2:50:12 PM

Subject: Accepted: Invitation: call w Linda Oglov @ Wed Apr 23, 2014 4pm - 5pm
(linda@oglov.com)

From: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

To: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

Date: 4/28/2014 3:37:10 PM

Subject: Accepted: Invitation: call w Linda Oglov @ Wed May 14, 2014 4pm - 5pm
(linda@oglov.com)

From: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

To: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

Date: 5/14/2014 4:03:42 PM

Subject: Accepted: Invitation: Call with Linda Oglov @ Mon Jun 2, 2014 4:30pm - 5pm
(linda@oglov.com)

From: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

To: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

Date: 4/28/2014 1:12:02 PM

Subject: Accepted: Updated Invitation: call w Linda Oglov @ Mon Apr 28, 2014 4:15pm - 5:15pm
(linda@oglov.com)

From: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

To: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

Date: 4/8/2014 12:56:28 PM

Subject: Accepted: Updated Invitation: call w Linda Oglov @ Wed Apr 9, 2014 3:15pm - 4pm
(linda@oglov.com)

From: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

To: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

Date: 6/30/2016 7:01:27 AM

Subject: call when you are ready please

604.288.7031



LINDA OGLOV

OGLOV BUSINESS DEVELOPMENT INC.

OFFICE: 604.288.7031 MOBILE: 604.787.9829

EMAIL: linda@oglov.com WWW.OGLOV.COM

From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>

To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>

Date: 10/17/2016 8:43:15 AM

Subject: contract extension

Hi Kevin - great to speak to you on Thursday! Once you have spoken to Dana, please let me know what you need from me related to contract extension. Thanks,



From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>

To: "[Pavone, Connie](mailto:connie.pavone@vancouver.ca)" <connie.pavone@vancouver.ca>

Date: 9/29/2016 2:06:15 PM

Subject: dates for calls w Kevin

Hi Connie - Kevin and I spoke just now and would like to schedule weekly half hour calls from 8-8:30 am on Fridays, starting Friday Oct 7 through Oct 28. Can you please send calendar invites for those 4 dates please. Let me know if there are any now that he could not make and we could perhaps change to the Thursday. If possible, I would like to change Oct 21 to Oct 20. Thanks,



LINDA OGLOV
OGLOV BUSINESS DEVELOPMENT INC.
OFFICE: 604.288.7031 MOBILE: 604.787.9829
EMAIL: linda@oglov.com WWW.OGLOV.COM

From: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

To: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

Date: 8/5/2016 7:39:26 AM

Subject: e-books + info on Strategy & Alan Oishi

Attachments: What Great CEOs Do.pdf

Guest Speaker Overview - Alan Oishi.docx

Shirlaws Presentation - Stages, Valuation.pdf

Hi Kevin - as promised, another of our MacKay CEO Forums e-books attached, this one includes a section around Strategy. Also attach Alan Oishi's bio and outline of the session he does for our CEOs groups, as well as a chart he uses to talk about a frequent pathway of strategic growth and hitting walls. As noted, if you ever want to connect with Alan, I would be pleased to facilitate that. He is pretty terrific. Thanks,
LO



What Great CEOs Do: How to Learn from Mistakes and Move On

28 real-life, one-page, CEO
Challenge-Solution Case Studies



MacKayCEOForums

MacKay CEO Forums
Accelerating CEO and Executive Performance
Through World Class Peer Groups in Canada





Introduction

This compilation of CEO case studies is based on real-life challenges faced by members of MacKay CEO Forums. The case studies were originally written for and published in *Business in Vancouver* as part of Dr. Nancy MacKay's monthly BIV column *The CEO Advantage*.

We gratefully acknowledge our members and *Business in Vancouver* for making this content available for the benefit of all CEOs and Executives.

It is our honour to work with exceptional leaders on a daily basis and to share the benefits of peer learning with our ever-growing community of CEOs. We hope you enjoy this booklet of case studies as a preview or complement to your own peer learning journey.

A handwritten signature in cursive script, reading "Nancy".

Nancy



WHAT GREAT CEOS DO: HOW TO LEARN FROM
MISTAKES AND MOVE ON

About MacKay CEO Forums

MacKay CEO Forums is committed to accelerating CEO and Executive performance through world class peer groups. We provide results oriented, professionally facilitated, CEO peer learning groups for medium to large companies across Canada.

Our forums enable exceptional leaders to surround themselves with successful peers who help them to become better CEOs and accelerate their business results while saving time for greater life balance.

MacKay CEO Forums is led by co-founder and CEO Dr. Nancy MacKay. Nancy and her team of highly skilled, trusted advisors and business leaders share a passion for helping CEOs and their companies accelerate performance, and currently have hundreds of members participating in forums across Canada. MacKay CEO Forums has an alliance with and is a national sponsor of the Deloitte Canada's Best Managed Companies Program



Nancy MacKay CEO & Founder



Topic Areas

Successful CEO Leadership Traits

Managing Up – Enhancing The CEO-Board Relationship

Building High Performance Executive Teams

CEO Happiness, Time Mastery & Life Balance

Strategy & Organizational Design

Social Media & Cross-Generational Challenges



How to Shift CEO Brand from Intimidating to Approachable

CEO CHALLENGE

A CEO had been with the company for two years, having taken over from a very caring, compassionate leader who was loved by all his employees and was now chairman of the board.

On the chairman's advice, the CEO participated in a 360-degree feedback evaluation and discovered that, although his employees admired his ability to deliver results, they found him intimidating and didn't trust him to lead them into the future.

In fact, the abrupt change in leadership style and resulting lack of trust was beginning to have an undesirable impact on the organization.

CEO MISTAKE

Since joining the organization, the CEO had spent most of his time focused on customers and other external stakeholders, spending very little time with his direct reports.

He always wore a suit and tie, though the dress code for the company was business casual.

He was also a very private person. At work, it was office talk at all times. He never revealed anything about himself, rarely smiled and did not take the time to stop and interact with employees.

After the 360 analysis, the CEO had to admit to himself that his personal "brand" was intimidating. To his significant credit, he made what must have been a very difficult personal admission. He knew that what he really needed, and wanted, was to be more approachable and to build trust with employees.

CEO SOLUTION

Whether you realize it or not, we all have a personal brand. Call it what you will—image, identity or reputation—it's pretty easy to describe what someone else is known for or what he or she is like. That's your brand.

And at the leadership level, that brand can have far-reaching implications for corporate culture and results.

Leadership studies reveal that 70% of CEO success is about strategy, execution and talent management. The other 30% is your brand: the physical (dress, grooming), physiological (body language, voice, words), emotional intelligence (people skills) and time mastery (where, how and with whom you spend your time) characteristics that you exhibit daily.

This particular CEO needed to focus on that 30% to improve his brand and, ultimately, his and the company's success.

To shift his brand from intimidating to approachable, the CEO committed to four changes:

1. He began to follow the business-casual dress code, ditching the suits and ties.
2. He spent more time with his team and employees. One-third of his time was dedicated to weekly meetings with direct reports, monthly meetings with senior leaders, weekly email updates to employees and 15-minute daily walkabouts.
3. He "caught people doing things right" at least five times a day with praise and recognition, either in person, by phone, by email or personal cards.
4. He made eye contact and smiled at employees as he walked about the office each day.

The outcome of his efforts were rewarded through a follow up 360 analysis, which revealed his brand had indeed shifted and he was now seen as a more approachable leader.

How to Avoid Surprises and Manage Bad News

CEO CHALLENGE

The CEO of an award-winning company met with his executive team to celebrate recent successes, including having just closed out their best quarter ever. The session was meant to be a review of their achievements and an opportunity to learn more about what had been done well.

However, during the meeting the CEO learned that their No. 1 competitor had surpassed them in the last quarter. In fact, they had lost to that competitor a significant contract just last month.

The leader was stunned. He had not been told of the loss by his vice-president of sales or anyone on the team. And he was frustrated and angry by what he viewed as a pattern. His executives neglected to keep him informed, and he found himself always having to dig for information.

CEO MISTAKE

The CEO lost it with his team, yelling obscenities and accusing them of "screwing things up badly."

"I can't believe you people didn't tell me about the loss," he yelled.

He demanded that his sales lead provide a full report within 24 hours explaining what happened and what needed to be done to ensure it never happened again. And he told them that all future losses were to be reported to him immediately, at which point he abruptly ended the meeting and stormed out of the room.

While the CEO may have been surprised, his team wasn't. Their leader was known for his explosive outbursts to negative news, and they had long since learned to do whatever it took to keep bad news under wraps.

CEO SOLUTION

To be successful, it's critical that a leader have open communication with his team, and that they are able to discuss the good and the bad without fear of reprisal.

As a CEO, if you want to avoid surprises, you need to do four things:

1. **Accept bad news in silence.** Don't say a word if you are angry or frustrated about bad news. Take a break, get a cup of coffee or just pause for a few moments to reframe the situation so you can identify your ideal outcomes before taking action.
2. **Don't play the blame game.** The CEO took no ownership of the loss of the contract, immediately blaming his direct report and the team and demanding they take action.
3. **Apologize and learn from your mistakes.** The day after his blow-up, the leader met individually with his executives and apologized, asking them if there was something he could do differently to make it easier for them to share all news with him—good, bad and ugly. His team helped him learn that because his reaction to bad news was so severe, people avoided sharing with him.
4. **Learn from successes and failures.** Working with his team, the CEO developed plans to avoid surprises by systematically reviewing all successes and failures. He clarified that his role would be to get involved in all future contract reviews to offer his support and help set the team up for even greater success in the future.



Master Your Emotions to Build Trust and Candour

CEO CHALLENGE

Are you a stoplight CEO? A client's assistant had a little stoplight hidden on the side of her desk. She explained to me that when it's green her boss is in a good mood and you're probably going to get what you want. When it's yellow it means you're going in at your own risk. And when it's red, you should probably reschedule the meeting. Wow.

CEO MISTAKE

This CEO was poisoning his work environment with his lack of emotional intelligence. I first met him when the dismal economy hit. He heads a publicly traded company in a tough industry and was under a lot of stress. At our first coaching session (a yellow day, according to his assistant), he exclaimed that he was having a horrible morning. "Our infrastructure costs are too high; we lost our biggest customer last month; I'm going to have to fire one of my VPs; my travel schedule is nuts ... "

I cut him off right there.

"Stop. You just can't show up at work like this." His negative emotional state was preventing his reports from bringing key issues and challenges to his attention, because he was clearly having a hard time just dealing with the issues at hand.

"Just because I'm the CEO, I have to be happy and optimistic every day?" he lamented. Actually, yes.

CEO SOLUTION

Emotions determine the quality of our lives and are contagious. If you're in a leadership role, you signed up to motivate and inspire people to deliver extraordinary results. Your ability to do so is enhanced if you can master your emotions. Start by focusing on five key areas: mood, adaptability, stress management, interpersonal relationships and self-awareness.

In this case, I gave our CEO a one-week challenge. "Every day this week, show up at the office in a positive emotional state: happy, optimistic, determined, passionate and confident."

At the end of the week, he reported back.

"People have been thanking me for being such a positive, easy person to work with. They say I am listening and focused on helping. And I've had the best week in my job for a long time."

He was also mortified to find out about the stoplight. "It's been green all week so my assistant got rid of it."

Don't be a stoplight CEO. Here are six strategies for developing a positive emotional mindset:

1. choose positive emotions every day (happiness, optimism, determination, confidence, gratitude, curiosity, passion)
2. embrace negative emotions (anger, frustration, disappointment, fear, hurt, sadness, guilt, loneliness, inadequacy) as a signal to take action
3. own your emotions; don't play the blame game in your external environment
4. change your physical state (move your body) to get out of a negative emotional state
5. practise every day to develop a new success habit
6. develop your top 10 list of what makes you feel good



MacKayCEOForums

SUCCESSFUL CEO LEADERSHIP TRAITS

Countering the Cover-Your-Butt Business Culture

CEO CHALLENGE

A CEO was shocked to discover that a member of his senior team had made a significant mistake in the new company compensation program – an error that could have cost the company millions. No harm done, the mistake was corrected. However, by the time the CEO found out about it, a full two months had passed from the time the mistake was first noticed. Why didn't the CEO find out sooner?

CEO MISTAKE

This CEO had an interesting style of managing, one that he himself referred to as the "drive-by shooting" approach to leadership.

Members of the senior team all had offices on the same floor. Each morning, the CEO would walk by the executive offices and, if he felt a direct report was doing a poor job, he would pull out a "virtual taser gun" and let that executive know he had screwed up. What's worse, if the CEO thought someone was doing a good job, he wouldn't say a thing. "Why waste time when it's all good?" was his rationale. And, if someone did an outstanding job, the taser was employed again to let that individual know that he could have done better. "It keeps their egos from getting too big," he concluded.

While you may find this behaviour extreme, the fear it created as well as the "cover your butt" culture was not that unusual. CEOs who are quick to criticize and reluctant to praise contribute to exactly the same environment.

CEO SOLUTION

In this case, the CEO needed to stop the drive-by shootings immediately or he was going to lose his team and experience productivity nowhere near its potential.

There is a better way to avoid the surprises of hidden information and position people for success, but this CEO had to make a complete turnaround to get there.

He learned to spend at least 30 minutes a week with each of his direct reports to learn about issues, challenges and successes in each area. This dedicated time was scheduled and locked in when it was least likely to get bumped so that the executives knew they were important and would be heard.

The key to these sessions was to have the executives take full ownership of their responsibilities. Each direct report was asked to drive the agenda for the meeting. It was then the CEO's job to listen for at least 80% of the conversation and reserve his words for last if he needed to discuss anything.

At least once per quarter, the CEO also discussed individual career and development plans with each executive.

This structure signalled to the executives that they were accountable for their areas and for reporting back to the CEO both good and bad news.

Needless to say, this about-face was very difficult at first for the CEO, but in time he grew to appreciate the new perspectives he gained during his executive meetings. He realized he had been missing out not only on critical information but some great ideas for helping the business progress.

Focus on Future Business Success Not Past Failure

CEO CHALLENGE

A CEO had high expectations for his executive team and was looking to speed up execution of the company's strategy. Yet he found himself continuously frustrated because projects were often not on time, on budget or adequately meeting business needs.

CEO MISTAKE

The CEO decided to hold a two-day session to improve project-management skills, and he kicked off the event by announcing that the executive group had a big problem with all the project failures.

One of the executives challenged that statement, saying the problem wasn't project management, it was chasing too many priorities. The team was overwhelmed and unable to deliver.

In response to the executive's candour, the CEO lost it. He stood up from his chair, pounding his fist on the table and yelled, "I'm tired of all of your excuses! If you're not committed to the success of this company, you should leave now. I'll be tearing a strip off you if that's what it takes to get you to speed up results!"

Motivating? Not really.

CEO SOLUTION

Leading should never be about berating and humiliating. Instead, you should aim to lead by influence—motivating and inspiring people to deliver extraordinary results.

As the facilitator for this session, I had the opportunity to help the CEO salvage the day. Everyone was given a 10-minute break, and the leader got a speed coaching session.

First, by showing up angry, frustrated and annoyed, the CEO had set the tone for the session and was even resorting to "crazy talk," which was clearly already having a negative impact.

Explaining that 55% of communication is body language, 38% is the tone of your voice and 7% is the words you use, the leader was encouraged to shift his body language to present himself more positively. Instead of his emotional, aggressive approach, he was shown how to sit with an open stance (shoulders back, chin up high and arms open). Though it might seem trivial, this change in his posture and approach allowed him to calm down and avoid a raised voice.

Developing a success habit of showing up in a positive emotional state every day is a big step toward motivating and inspiring the people around you.

Next, the CEO was told that his obsession with past failure was ensuring he would only realize more of the same in the future. Instead, he had to realize that the past was for learning and then letting go. He needed to focus instead on future success to motivate and inspire others, especially during tough economic times.

The CEO also needed to use motivating and inspiring questions. He was going to have to replace the accusations with encouraging words like, "I know you're up for raising the bar" and "What can I do to get you set up for success?"

Finally, the CEO had to rebuild trust by apologizing to the team for "losing it." None of us is perfect. Apologize, learn from it and move on.

The team regrouped and instead of spending two days discussing project management, it set new priorities, identified roadblocks and strategized on next steps.

It Doesn't Have to be Lonely at the Top

CEO CHALLENGE

A 10-year CEO came to me thinking he needed to resign. He'd been in the industry for 25 years, and he was done.

"We've lost our biggest customer, our CFO is incompetent, the banks aren't happy, the U.S. dollar is killing us and my executive team can't get us through these tough times," he lamented.

He also wasn't sleeping, had lost confidence in himself and was losing perspective of his situation.

CEO MISTAKE

It's lonely at the top. At our first coaching session, I asked him if he ever spoke with other CEOs to learn how they are dealing with the dismal economy.

"I pride myself in being a lone wolf," he replied. "I prefer to solve problems on my own. I've never had to reach out to anyone else, and I really don't know any other CEOs well enough to share confidential information."

He also confided that I was the first person he'd talked to about the state of his organization—even his wife didn't know how bad things were.

It's a common mistake—being a lone wolf versus reaching out to others to achieve greater success in work and in life.

CEO SOLUTION

Just because you're the CEO, doesn't mean you have all of the answers. If you reach out to others, you'll learn a lot, make better decisions and become an even stronger leader.

I invited this executive to attend a CEO forum—a group of 12 to 14 leaders from non-competitive industries who get together several times a year to discuss challenges and learn from each other in a confidential setting. He reluctantly agreed.

During the session, I asked him, "If you knew you couldn't fail what would you do?"

"I would talk to all of my customers and ask them to stay with us during these tough times," he replied. "I would fire my CFO and hire one who could speak business and not just numbers. I would get together with my executive team and fully disclose what is going on so that we could develop a 90-day action plan to turn the situation around. And I would talk to my wife."

Another attendee described how three months prior he had talked to all of his customers and suppliers with amazing results.

"I'll always be grateful to them for hanging in there with me," he said.

Another advised our CEO not to let his finance lead go until he had identified a replacement.

"I fired my CFO, and it took over eight months to find a replacement. It was a nightmare."

A third CEO told of how he gathered his executive team and asked for their commitment to turn the company around. Each agreed, and they got through it together, resulting in a rock-solid team and a more successful organization.

Support, trust and candor can be remarkable tools for success. Our leader joined the CEO group and gives it, and his wife, full credit for helping him get through the most difficult time in his life and career.



Building Self-Esteem is Key to Handling Sudden Setbacks

CEO CHALLENGE

A very successful CEO, a leader in his industry, was so severely stressed that he wanted to quit and sell the company.

His president and partner—together they had bought the business five years earlier—had taken a sudden long-term disability leave following a divorce and illness that led to depression. The CEO had not made any succession plans nor did he know how to manage the business in the president's absence.

It was all too much for the CEO, and he didn't think he could handle it.

CEO MISTAKE

Just about any CEO would falter in the face of the unexpected loss of a key executive, but this CEO had reacted to the situation in a way that had become destructive.

His problem rested in his low opinion of himself, which was causing him to focus on potential failure. He obsessed about letting his partners, employees and customers down. He imagined the worst situation possible, believing the company would fall apart without the president and a solution could not be found. He reprimanded himself for not having a successor in place and even said he felt he deserved to suffer.

This CEO compounded the stress by not reaching out to his friends, family and other professionals. He saw gathering support and assistance as a sign of weakness and didn't want to see his reputation ruined.

CEO SOLUTION

Building one's self-esteem and confidence is a life-long journey that pays big dividends to a CEO who is dealing with setbacks. But even top CEOs can struggle with big obstacles.

To cope with the sudden challenge of running the business solo, this CEO needed to take several steps to maintain his composure and perspective.

First, he was coached to reach out to others immediately and ask for help. Ironically, this helped to build his self-confidence. By letting his "I need to look good" ego get in the way, he had been missing valuable opportunities to gather suggestions and input from peers and others. Asking for help isn't a sign of weakness; it's a sign of strength and an acknowledgement that learning all one can from others can only enhance skills and knowledge.

This leader also learned to see things differently. Instead of dwelling on his lack of preparation, he began to focus on how much he could and would learn from the setback. He began to welcome the opportunity for growth and see the challenge as something to face head on.

He also needed to take care of his physical health to manage stress. He began to exercise regularly, which improved his mental well-being.

With a new attitude, the CEO worked with his team to focus on the success of the business, not its demise. They developed a massive short-term action plan to put resources into place that would manage the immediate challenge and bridge the gap between crisis and future success.

How to Deal with a Difficult Board Member

CEO CHALLENGE

The CEO of a private company reported to a board of eight members, one of whom had been the previous CEO of the organization for 10 years.

Though she had been two years at the helm, the current CEO continued to experience problems with her predecessor. Clearly, he was having a hard time letting go of his old job. Not only was he constantly challenging management results and new approaches to running the business, he was showing up at the office every day and instructing people what to do. Asking the board chairman to help was not an option because the chairman was averse to conflict and therefore not prepared to do anything about the challenging former leader.

CEO MISTAKE

The current CEO was making a lot of mistakes that were confounding her problems.

In her frequent conflicts with this board member, she was quick to point out where he was wrong at every turn. In her attempts to change his behaviour, she simply kept telling him to stop interfering, which served only to make him increasingly challenging and aggressive.

The CEO complained about the board member to her management team, her spouse, her friends, her family and anyone else interested in listening (or not).

She also became extremely defensive any time the former CEO challenged her or her team. Needless to say, this left her highly stressed and frustrated before, during and after every directors meeting.

CEO SOLUTION

Leadership is about motivating and inspiring people to take positive action, whether those individuals are your direct reports and employees or board members.

In this case, the CEO was remiss in not taking some time to see the other side. She needed to step into the shoes of the former leader and have empathy for his situation. After 10 years of running the company, it likely was difficult for him to make the transition from CEO to board member. It stood to reason that he could be searching for the same sense of significance and challenge he enjoyed in his earlier position.

He was probably also continuing to feel a high need to make a contribution.

The current CEO sought some advice. She was coached to take a far more proactive approach that resulted in her meeting each month with her predecessor to ask for his input and allow him to contribute and even influence decisions.

She asked him to help her set up appropriate boundaries for their roles and a process for decision-making through this transition period.

The CEO also learned to encourage her management team to value and honour the former CEO's on-going contribution while at the same time respecting the boundaries that had been developed.

After six months and a significant shift in the CEO's mindset and her relationship with the board member, he was no longer such a challenge and, in fact, became the CEO's strongest supporter.

Ego-Talk in the Boardroom can Undermine CEO Success

CEO CHALLENGE

At a recent board meeting, a CEO was shocked to discover he was on the verge of being fired. His executive team adored him, but the board viewed him as arrogant, dismissive, disrespectful and defensive. Why? Loud ego-talk.

CEO MISTAKE

There are more than six billion people on the planet, and we all have egos. Our egos help us distinguish ourselves from others and maintain our self-image and esteem. But sometimes our egos can take on a life of their own and get in the way of creating trust and connections with the people around us.

Ego-talk is the blaming and judging of others, whether out loud or to oneself, which stems from a strong need to look good and be right. In the words of our CEO, "My chairman couldn't run a meeting if his life depended on it and the board members are idiots. They ask stupid questions and don't understand our industry. They waste my time and then challenge me as if they know more about the business than I do."

Harsh words indeed. No wonder board members couldn't warm up to him. He was a brilliant leader and delivered incredible results, yet over the past six months every board member had suggested to the board chairman that he be dismissed.

CEO SOLUTION

The board chairman sought my help. The reality is that looking good to the board, or anyone else for that matter, is not the goal. The CEO's job is to allow other people to influence him or her toward becoming a better CEO.

How we manage our egos is all about self-awareness, and the vital leadership behaviour to help minimize ego-talk is to get feedback. In this case, our CEO was anxious for coaching, so I gathered feedback by conducting formal interviews with his reports and board members.

But you don't always have to go to that extent. Just sit down with your staff, your peers, your board, your spouse and ask what's working well and what's not.

After collecting feedback, I met with our CEO to deliver the news.

Not surprisingly, his direct reports gave glowing reviews. However, when it came to the comments of the board, he was chagrined, having no awareness of the impact of his ego-talk.

"I am so embarrassed that they can actually see what I think about them. I'm not an arrogant jerk, but I thought I had to look good."

Wrong assumption.

Knowing how the board members felt about him, the CEO showed up at the next meeting with his ego-talk firmly in check. He asked questions of board members, he listened attentively and he didn't judge. After the meeting, three members approached him and thanked him for being so respectful and accommodating. They asked him what happened. "I got the feedback and it was very impactful to me. I realized that ego-talk was getting in the way of connecting with board members and serving the company."

He has since committed to developing and sharing a 90-day action plan with the board with the intent to improve his working relationships and minimize the destructive impact of ego-talk.



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How to Avoid Getting Fired

CEO CHALLENGE

A 58-year-old CEO had been in his current job for three years, the first two of which were the best of his career. He ran the highest performing national division of his global company and he loved his team. His entrepreneurial style was appreciated as was his tremendous success in turnarounds.

But the last year had been a grind. A new boss of the global divisions was now in charge, and the CEO couldn't stand him. He was bureaucratic and a micromanager. He refused to provide resources to grow the business and didn't support the CEO's ideas and initiative.

Unbelievably, this fellow's communications skills were almost non-existent. In addition to not treating people with respect, he didn't listen. He was killing trust and candour amongst all his new reports, including our demoralized CEO.

CEO MISTAKE

Now it became a chore to come into work every day. The CEO was in constant conflict with his new boss, calling him on all of the things he was doing wrong. As a result, the CEO lost all motivation to deliver results. Part of that was due to a growing lack of interest, but there was a side of him that just wanted to get back at this jerk.

Big mistake. By letting his ego play the blame game with the new boss while at the same time neglecting his responsibilities, the CEO had put himself in dangerous territory. He might have been surprised to find out he was about to get fired.

CEO SOLUTION

It will never serve you well to get into regular conflict with your boss, or anyone in a power position for that matter. You will never win, and being fired is not something you want on your resumé.

When you find yourself in a situation where all you can do is focus on all of the things you can't stand about your boss, you have three options.

First, you can stay stuck. You can let your ego get in the way, convince yourself that you are the victim and then continue to complain and push back. After all, if it hadn't been for the new guy, everything would have been great.

Alternatively, you can park your ego and rebuild the relationship. You'll need to let go of the past and commit to moving forward. Apologize for what you've done to contribute to the discord and, if necessary, reach out to a third party to help rebuild the relationship.

The final option is to simply get out. Perhaps life is too short to be working closely with someone who isn't a fit.

In this case, the CEO chose to get out because he did not believe it would be possible to rebuild the relationship with the new boss. He developed a 90-day action plan to find another opportunity for work in an environment that was a better fit for him.

If you want to avoid getting fired, you need to stay away from the first option. The other two are far more empowering ways to enjoy your career.

How to Rebuild Corporate Board Trust and Effectiveness

CEO CHALLENGE

For the first time, the board of an organization decided to evaluate its effectiveness, inviting the CEO and the management team to participate by providing feedback on their perceptions of the board's ability to carry out its responsibilities.

Board members completed a self-evaluation, awarding themselves scores of three or four, on a four-point scale, in most categories.

The management team, on the other hand, gave the board scores of one or two out of four.

Board members were not pleased.

CEO MISTAKE

When the CEO met with the board to discuss the results, board members expressed extreme disappointment with the low rating and the negative feedback from management. They questioned whether the CEO had the right management team in place to move the company forward. To them, it was evident that management didn't understand the role of the board or know how to effectively interact with board members.

The two-year CEO reacted by accusing the board of being defensive and not open to feedback. She sided with her management team and suggested that the board needed to be more strategic and less focused on operational decision-making. She also conveyed that the board should be more open to being challenged and that it was the board's lack of candour that was leading to problems.

Not surprisingly, the reaction of board members was not positive. Their solution to the attack was to shut down the CEO. They asked her to complete a review of her management talent pool and develop a plan to educate the executive team on how best to work with a board.

The meeting got so heated that everyone decided they needed some time to cool down and a future meeting was scheduled.

CEO SOLUTION

It was important for this CEO to remember that the point of the evaluation was ultimately to raise the bar on board effectiveness, not to argue over the validity of the results.

With some assistance, the CEO learned that the trust between management and the board had taken a hit. She needed to defuse the situation by first acknowledging the disappointment of the board instead of trying to make the board wrong for getting defensive.

At the followup meeting, she was coached to listen first—an initial step to regaining trust. She let the board members explain what they wanted to do to address the situation and then she suggested a three-step process that would lead to a 90-day action plan to rebuild trust.

First, she spoke with each board member individually to get his or her input on next steps. Then she met with her management team to discuss the board's suggestions and asked the executives for their ideas. Using all the input, she developed and presented a plan that met with approval from all.

By working the plan over the next 90 days, the CEO was able to build board effectiveness in a more constructive and positive way, with the assistance and support of her management team.

New CEOs Need to Focus on Building Trust

CEO CHALLENGE

The recently appointed CEO of a large publicly held company was enthusiastic about his new opportunity. A lack of trust and transparency, which resulted in poor relationships with the leadership team and board of directors, sunk the last leader. Could the new guy effectively repair the damage?

This CEO thought he could. His previous experience and track record spoke for themselves, and he knew the board had made bad decisions in the past, including hanging on to a leader who should have been fired long ago.

He set to work with his executive team to fix what he saw as a dysfunctional organization. He made sure everyone knew his past experience and capabilities made him more than qualified to make the necessary changes, and he acted as a buffer to the board, keeping it as uninvolved as possible while he began the process of turning the company around.

CEO MISTAKE

This CEO made three of the most common mistakes that new leaders make in their first 90 days.

First, he viewed the board as incompetent. He believed he had been brought in to keep the board out of his way while he and his leadership team worked to repair the damage.

Second, he didn't respect the company's past.

Third, he didn't let go of his own past. He repeatedly expressed how his experience put him in a position to save the company from previously ill-equipped leadership.

The result was not surprising. Not only was his style an insult to the board, executives and employees, his behaviour ensured there was no building of trust. By neglecting to forge relationships with his new colleagues while effectively positioning himself as the organization's saviour, he created more problems in a company desperate for strong leadership.

CEO SOLUTION

The CEO's job is to build two-way trust and respect with all stakeholders. To address his mistakes, this CEO was assigned several action items, the first of which was to recognize that he and the board had a common objective: to do what's best for the company and shareholders. It was not his role to "fix a dysfunctional board." The CEO met with the board chairman and each member individually once a quarter to establish relationships, trust and transparency and to ask for feedback. Not surprisingly, this trust-building sped up decision-making and results at board meetings.

The CEO also learned that he had to show respect 100% of the time. He learned to create trust and candour by focusing on strengths and identifying opportunities for innovation and improvement.

Lastly, he was encouraged to stop talking about his previous experience and instead listen 80% of the time.

Learning as much as possible about the company paved the way for stakeholders to become more trusting and, ultimately, beginning the desired turnaround of the organization.

Building Executive Team Effectiveness can Accelerate Better Corporate Results

CEO CHALLENGE

A CEO reviewed his last-quarter results, which were the worst in the company's history. Despite being industry leaders, the economy had hit the organization hard.

But it was more than that. The CEO reflected on his executive team members. He knew they operated in silos, but it had grown worse with the downturn and now there were frequent conflicts. Many of the key projects they had implemented of late were either not delivered on time or on budget, and some of them were not even meeting planned objectives.

CEO MISTAKE

The CEO had a unique style of leading. He travelled extensively and felt that executive team meetings were a waste of time. Instead, he preferred to hold ad hoc sessions on an as-needed basis.

He also ignored the conflicts between his team members.

"I hired good people and they are mature adults. I expect them to get along," he quipped.

Our leader didn't hold back on showing his frustration with the stalled and failed project initiatives and slow business results.

"They need to know when they aren't measuring up, and frankly, I should be upset," was his comment.

CEO SOLUTION

The only way to get great results is with a high-performing executive team. And if your results aren't coming fast enough, focusing on building that top team could be the solution.

With some candid feedback and requests from his team, he grew to recognize that his style was only adding to the problem. Instead, he courageously formed a plan for change.

First, he committed to meeting with each direct report for 30 minutes a week, either in person or by phone. His goal was to set his team up for success, one person at a time, and to remove any barriers or obstacles to goals.

Second, he began to lead one-hour weekly executive team meetings, again by phone if necessary. The meetings had several results.

The CEO needed to build trust within the team and in him. The meetings provided the opportunity to be candid and to get to know each other better by sharing key issues and challenges each week.

The meetings also helped to bust the silos and to encourage the team members to ask each other for assistance and insight.

Instead of the finger-pointing that had gone on until now, the meetings fostered healthy conflict by clarifying who the decision-makers were and allowing the group to solve key issues and challenges together as a team.

Best of all, the meetings allowed the team to celebrate success and build confidence for future challenges.

The CEO also learned to manage conflict within the team. If two team members were in conflict, he met with them both together and individually and held them accountable for resolving the issue. He also was clear in his support for their efforts to move forward.

Lastly, the group began to hold half-day meetings to review all strategic projects, and the team set a date for a one-day annual strategy development retreat to review, plan and, yes, celebrate.

Conflicts Caused by Confusion Over Who's Responsible for Making Decisions

CEO CHALLENGE

A five-year CEO thought he needed to fire one or two of his executives because of ongoing conflict between them.

"These two guys can't stand each other, and the conflict between them has been going on since I hired one of them last year."

The two were never on the same page when it came to important decisions, and it became so bad that they weren't even on speaking terms.

The CEO empathized with the executive's direct reports, who felt caught in the middle and were coming to him with complaints. Worse, the problem was getting in the way of results. Was firing the only solution?

CEO MISTAKE

This CEO made a few mistakes. Early on, he had asked each executive to commit to building a positive relationship and then hoped the conflict would go away, avoiding it for a year. He also did not encourage the direct reports to go to their bosses to share their concerns, instead choosing to commiserate with them and let them know he valued their feedback.

But by far the most serious mistake was that the CEO did not clarify: the decision-maker (the D) for each area of responsibility. In fact, he felt to do so was a waste of his time. "They are adults; they should be able to work it out," he quipped.

Without knowing who was accountable for the results associated with each decision, the executives, and others, really had no choice but to quarrel. Neglecting to clarify expectations around outcomes and decision-making leads to unhealthy conflict.

It's the CEO's role to set everyone on the executive team up for success by making sure each has clarity around authority and results.

CEO SOLUTION

It was suggested to the CEO that he take steps to set his executives up for success. First, he needed to ask each one to identify the outcomes he was accountable for and the key decisions he needed to make to achieve those objectives.

The next step was to hold a meeting with both executives to clarify who had the decision-making authority for the various areas of responsibility. If they couldn't agree on who had the D, the CEO would have to decide, based on who had the right skills, behaviours and experience to deliver on the outcomes. For the next 90 days, the CEO met with both executives together for 30 minutes a week to continue to set them up for success. He also met with them outside the office from time to time to establish a more personal relationship and rebuild trust. Furthermore, he encouraged direct reports to take their issues to their bosses instead of the CEO.

The CEO was prepared, at the end of the 90-day period, to let one or both executives go if there was still conflict. In the end, that wasn't necessary, as the executives were able to repair their relationship and support each other's decisions.

Get Buy-in Before Adding to Your Executive Team

CEO CHALLENGE

The CEO of a high-growth company had just completed a successful acquisition and wanted to ensure the new addition was well integrated into the organization. At the same time, he needed to free up his time to continue working the company's growth strategy so he decided to expand the executive team with a new COO role. Up to this point, the group had consisted of a CFO, CIO and vice-presidents of human resources as well as sales and marketing.

The CEO was introduced to a rock star candidate through an industry colleague. They met and the CEO was impressed, eventually inviting the potential executive to meet with the team to see if he would be a good fit.

Much to his surprise, when he announced the plan, he got significant resistance from each person and was told the role would interfere with the ability of the organization to move forward.

The result: a complete loss of trust in the CEO by the executive team members.

CEO MISTAKE

The CEO had made three critical mistakes. First, he did not explain at the outset why he felt a COO role was necessary to set the team up for greater success.

He also did not give the other executives the opportunity to have a say in the decision and to help with the development of the role to ensure there were clear interdependencies with other management functions.

Lastly, he did not give anyone on his team the opportunity to express his or her own interest in the new role before he began recruiting.

CEO SOLUTION

Leaders must follow the principle that strategy drives structure and role clarity. At the outset, our CEO should have explained the thinking behind the need to change the team structure and then defined the new role and its responsibilities.

In clarifying a new job, it is important to seek the input of each team member individually. Give all executives an opportunity to discuss the business outcomes of the new position and then work together as a team to finalize the role description.

In order to identify the best recruiting process for the new role, discuss the pros and cons of doing an internal search versus working with an external recruiter and demonstrate that a key position such as a COO will require the help of external experts.

And to retain top talent, give anyone on the team who wishes to apply for the new job the opportunity to do so, provided they have the required skills, behaviours and experience to deliver results.

Finally, to further minimize resistance, give everyone the chance to participate in the recruiting process, including meeting potential candidates and having input to the final selection decision.

In this case it took the CEO three months to rebuild his team and earn back his colleagues' trust. By that time, the original COO candidate was long gone and the firm wisely sought external recruiting help. Four months later, a COO candidate was finally hired.



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BUILDING HIGH PERFORMANCE EXECUTIVE TEAMS

Retaining Top Talent

CEO CHALLENGE

A CEO was stunned at the sudden resignation of his CFO, a stellar performer with 10 years at the organization and a candidate for the top job. The primary reason? Boredom.

CEO MISTAKE

The jilted CEO had made a common mistake.

"I didn't spend any time with my A players because I didn't want to get in the way," he explained.

What he didn't realize is that top employees need new challenges and learning opportunities to stay motivated, otherwise they look elsewhere.

Another reason the CFO in this case had sought greener pastures was that he'd never been told he was a potential successor.

"I didn't want him to think it was guaranteed since ultimately it's a board decision," rationalized the CEO.

He didn't make that mistake again. It's critical that top talent be told they're on the succession plan and that opportunities for them have been identified by the entire executive team.

Like most organizations, this one had spent most of its development energy trying to bring myriad employees up to "average." Worse, its training budget was the first to be trimmed in a recent cost-cutting exercise.

CEOs need to stay connected and help their best people achieve their full potential. Spending too much time with lesser performers, working to improve their capabilities or even defining what needs to be done, will not deliver results. These people are not the future of the company.

CEO SOLUTION

To win the talent wars, CEOs must do something counterintuitive. They must invest in their A players who can create a standard that drives the organization forward. And handing development over to HR isn't the answer. HR's role is to provide the most effective tools to accelerate development, but it's the CEO's job to keep top talent in the game.

To make sure he didn't lose another top performer, our CEO began working with each of the top 30 leaders on the succession plan to develop a 10-year career vision that not only jazzed them up, it freaked them out. Because most people achieve less than 10% of their full potential, it can be tremendously powerful to really challenge your best talent to play a bigger game.

HR wasn't excluded. Our CEO partnered with HR to validate the career plans and to identify the most effective development approaches. Together, the skills, behaviours and experience gaps for each key player were identified and included in the career plan.

Once done, full support in terms of time and available resources was directed toward follow-through on the development plans. The excuse that someone was "too busy" to focus on the best people was an immediate red flag, and our CEO made sure he exerted the necessary pressure.

He also held the top talent accountable for following through on their career plans. The plans were a joint effort, not something merely "done to them," and high potentials were expected to live up to expectations. He provided coaching and mentoring weekly in addition to quarterly performance reviews, so that it became a normal aspect of the organization's communication and conversation.

"We've changed the focus of our development and we concentrate more on our best employees," our CEO said. "It's become a much bigger part of my role as a leader, and I can see that I'm getting even more out of people."

How to Hold People Accountable for Results

CEO CHALLENGE

What is a CEO to do with a high-performing direct report who just won't get with the program?

In this case, a CEO was struggling to rein in his vice-president of sales, who was a rock star when it came to sales results but wasn't much interested in the executive agenda. The company was implementing a new customer relationship management (CRM) system and the VP was the executive responsible, but he was having no part of it. He thought the project was a waste of time and money because he had been extremely successful without it. Furthermore, he didn't want his sales team distracted with data entry and other administrative tasks.

It didn't stop there. The sales lead rarely showed up for executive team meetings and, when he did, he was on his BlackBerry constantly or leaving early. Needless to say, the CEO wasn't the only one frustrated, and it didn't help matters that the VP was adored by his staff.

CEO MISTAKE

Naturally, the CEO didn't want to tinker with a good thing—the VP did turn in extraordinary results. Hoping that things would improve over time, the CEO decided to ignore the problem, which only made matters worse.

Other members of the leadership team began to complain about the renegade VP and speculate that the CRM project was a failure.

After a year, the CEO realized that he needed to hold the VP accountable. The CEO began holding monthly meetings with the vice-president, during which he expressed his disappointment and frustration. The meetings were painful and did nothing to create new attitudes or behaviours.

Six months later, the CEO gave up and took ownership of the CRM project himself. It seemed the only alternative, as losing such a star performer was not an option.

CEO SOLUTION

Holding people accountable for results is not about communicating blame, frustration and disappointment in a monthly meeting. Instead, accountability is about persuasion and motivating people to say "yes" to delivering results and new behaviours.

Here are six strategies to enhance your ability to hold people accountable by using persuasion versus playing the blame game.

1. People like people who like them. Before holding people accountable for new results and behaviours, make sure you have a solid history of praising their strengths.
2. Model the behaviour you want to see in others.
3. Persuasion is more effective when it comes from peers versus the boss. Other vice-presidents would have had more influence on the sales leader.
4. Make commitments written, public and voluntary. Getting the VP to commit in writing, in public (at leadership team meetings) and voluntarily would be far more effective.
5. Create a sense of urgency using "loss language": "We will lose a lot of money if the CRM is not implemented on time and on budget."
6. People defer to experts, but don't assume your expertise is self-evident by virtue of your CEO title alone. Share your previous experiences (successes and failures) to have greater influence.

Don't Wait Too Long to Upgrade Talent in a Tough Economy

CEO CHALLENGE

Two years ago, the CEO of a private family-run business brought in an external chief operating officer. The idea at the time was that the COO would free up some of the senior executive's time so that he could be more focused on the marketplace and the bigger picture.

Naturally, the tough economy had caused the business to lose some key customers. However, as time went on, the CEO began to suspect that the operating chief was not strategic enough to keep the business running during difficult times. Though he once saw the COO as an "A-player," results over the past six months suggested otherwise.

The CEO decided to confront the no-longer new guy. In response, the COO became extremely defensive, telling his boss that he was getting in the way of success and was too much in the weeds. The COO expressed that he was not the problem, and even asked the CEO if he wanted his old job back.

CEO MISTAKE

In this case, our CEO made several mistakes. First, he waited too long to have a candid conversation with the operating officer about the growth strategy for the business. The chief executive became concerned about the problem a full six months before he brought it up, which is bound to put anyone on the defensive.

However, prior to that, the CEO ignored some early warning signs. During management meetings, the COO had been strongly resistant to the company's strategic plan. In fact, he never really bought into the plan at all. The result: he wasn't executing, and results were suffering.

In addition, because the COO was not being held accountable for any results, he obviously did not feel particularly responsible for corporate progress.

And, lastly, the CEO was in denial, continuing to think (or hope) that his direct report would some day be the A-player that the CEO thought he had hired.

CEO SOLUTION

During a tough economy, companies need to shift from being "order takers" to "order hunters" if they are to survive in an increasingly competitive environment.

The difficulty is that just because someone is a star order-taker, doesn't mean he or she will be as good in an order-hunting world.

As a member of a CEO peer group, this leader brought his dilemma to the next meeting. With the support and advice of his peers, the CEO came to realize that he needed to upgrade his talent pool to manage the business in challenging times.

It had become clear that the COO was not able to let go of the past and commit to the new corporate strategy, leaving the chief executive with the proverbial fish-or-cut-bait decision.

In the end, it was decided that a new COO was needed—one with a lot of passion, energy and confidence in the future as well as a commitment to the organization's plans.

That new hire was made and a 90-day plan was developed to fast-track results. In that time, the economy didn't improve, but company sales, morale and prospects were decidedly up.

CEOs Need to Focus on Overall Corporate Results

CEO CHALLENGE

A CEO found himself spending most of his time working with one member of his executive team who was not meeting his targets. The CEO had joined the company two years ago and had yet to be impressed by this individual, who had a 10-year history with the company. What's more, the individual was in the midst of some serious personal problems, including medical issues and a divorce. The CEO was sympathetic and, in addition to his time and support, had ensured his direct report had received development training, at a significant cost to the company. Despite it all, the results just weren't there.

CEO MISTAKE

It's natural to want to help someone going through a tough time and, as a new CEO, there could be some strategic merit in being seen as supportive of a long-term employee who has hit a bad patch. But as the leader of the organization, you are responsible for the well-being of all the organization's stakeholders. Permitting below-par performance is bound to hurt morale, never mind the bottom line. Furthermore, by spending so much time rescuing instead of developing his A-players, this CEO was missing a major opportunity to accelerate results.

CEO SOLUTION

It's the CEO's job to deliver extraordinary results mostly through leadership that allows employees to achieve their full potential. Those with the right skills, behaviours and experience who are also passionate about their work are A-players that need the majority of the leader's attention and encouragement. Those that lack what it takes will really never get there, and a leader is not serving them or anyone else by keeping them in roles in which they cannot succeed.

Here is what our leader should have done.

It takes about 90 days to determine if someone is fit for his or her role. By developing desired outcomes for the end of a 90-day period and helping the individual form a plan to achieve those objectives, a leader will be able to identify those who have the right combination of competence and enthusiasm.

During the 90 days, the CEO should meet with the person for 30 minutes a week, either by phone or in person. During the meeting, the CEO provides feedback, coaching, mentoring and guidance, while also assessing the person's ability to execute against his or her plan.

At the same time, it's critical for the CEO to identify individual strengths and weaknesses in the executive team. Poor performance in one role doesn't necessarily imply the executive won't do well elsewhere in the organization.

At the end of three months, a leader will be in a position to do one of three things: continue to support and develop a top performer, find another role for a potentially great employee or help the individual exit the company.

In this case, providing an employee assistance program to help this executive cope with personal problems would also have been in order. But, eventually, tough decisions need to be made for the benefit of all concerned.

The Truth About Why Executives Quit

CEO CHALLENGE

A CEO had developed a high growth strategy for her organization and had hired a rock star COO to take the lead in executing the plan. She was proud of the fact that she had been able to attract such talent from a key, and much larger, competitor.

After an outstanding year, the COO handed in his resignation. His reasons? More money and a promotion outside the industry.

The CEO was stunned. How had she not seen this coming?

CEO MISTAKE

The CEO thought she had a great relationship with the COO. She had given him lots of autonomy and recognized his efforts with a stellar performance review and a significant bonus.

Her mistake was that those were the rewards that motivated her. She had not taken the time to get to know the COO at a personal level and to understand what was really important to him.

She operated on the principal that if she didn't hear otherwise, all was going well. Unfortunately, all was not well, and because she wasn't more tuned in, she had no idea.

CEO SOLUTION

Business is about people and the most important relationship in a company is the one with the boss. It's the number one reason why people leave, though they will tend to say they are leaving for more money or anything else less sensitive.

As a leader, if you are not spending 30 minutes a week with each one of your direct reports, you too will likely get an unwelcome surprise.

It's one of the most difficult parts of a CEO's role because it takes discipline and commitment in a work world that seems to operate everywhere but the office. But if you are not building a relationship of trust with your top talent, you too will find it difficult to retain them.

There are six key drivers that motivate people at work. Of course, everyone is unique and at different stages of their lives and their careers. Therefore, at any given time, two of the six drivers tend to be more important to any one person than the others.

That means that whatever motivates the CEO does not necessarily match what motivates her direct reports. And executives quit if the most important of their key drivers are not being met.

Ask members of your team to report on a quarterly basis, using a 10-point scale, how satisfied they are on the six top motivators, which include: relationship with the leader; learning and growth opportunities; challenging work; feeling significant; contribution to the success of the organization, and; certainty of career opportunities and financial rewards.

If the scores are very low on most drivers, it's likely that the person is in the wrong place at the wrong time and one may have to consider dramatic changes for that role.

If the scores are low in just one or two areas, you have an opportunity to work with that person to develop an action plan and improve the scores, and the engagement



MacKayCEOForums

CEO HAPPINESS, TIME MASTERY & LIFE BALANCE

Build on Strengths to Achieve Time Mastery

CEO CHALLENGE

The CEO of a successful company learned from members of her senior team that their biggest challenge was not having enough time to get everything done. She understood completely. Too much work and too little balance had her worried about burning out herself. Concerned the company may lose productivity, not to mention valuable talent, she struggled to find more time and juggle key projects better. It wasn't helping.

CEO MISTAKE

Accelerating performance in demanding times isn't just about managing your schedule. It's about building on your strengths. Capitalizing on what you do well allows you to work smarter, not harder. Ultimately, it's the only way to achieve time mastery and life balance in the face of constant and growing demands, both personal and corporate.

Consider this. Research from the Gallup Organization shows that 87% of employees believe that fixing weaknesses is the best way to accelerate performance. What's more, only 17% of employees believe they use all of their strengths on the job and only 20% spend most of their time discussing their strengths during performance reviews. We're focusing on the wrong thing!

In this case, our CEO found herself spending far too much time on activities that were not her areas of strength. She was also making too many of the business decisions, which created a bottleneck and certainly didn't play to the strengths of her team. In addition, it was hard for her team to tap into her schedule, causing them to feel disconnected and unable to set priorities.

CEO SOLUTION

To tackle this time-management problem, the CEO and her team participated in a time-mastery workshop. To begin, the executives listed their top 10 activities in each of their current roles and then self-rated their ability to perform each activity as masterful, excellent, competent or incompetent. They then gave each other feedback on individual strengths as well as opportunities for improvement.

It got really interesting when each person was challenged to stop doing or minimize the activities rated as either competent or incompetent. Instead, he or she was to focus on spending 80% of his or her time on areas of strength—activities ranked as masterful or excellent.

To ease the transition, executives developed a 90-day plan with clear objectives to build on their strengths. In each case, they were instructed to spend most of their time on the three most vital activities needed to drive the results for which they were accountable. In addition, each executive developed a top 20 list of key business relationships, both internal and external, to foster over the next 90 days.

At the end of the 90-day period, there was a new and significant vitality to the executive team as each member reported being more productive and less frazzled. Building on strengths may not be what comes to mind when considering time management, but ultimately it is the path to driving continued and growing performance.

Why Workaholics Turn Talent Advantages into Disadvantages

CEO CHALLENGE

After the best year of his career, an executive was appointed CEO. He had accomplished an important goal and, to all appearances, he was a success. Yet the rest of his life was out of control.

To get that promotion, he had spent more than 80 hours a week working and travelling extensively. Not surprisingly, it had taken its toll.

His wife had called him six months ago while he was on a business trip to let him know that she was leaving him and would be gone when he returned. He had been too busy travelling to have developed much of a relationship with his teenage children, and he had no close friends. He hadn't had a medical examination for more than three years because he was too busy to fit it in. And, even though he was a CA, he didn't have a financial planner—a fact of which he was now acutely aware given that his marriage was dissolving.

CEO MISTAKE

Clearly, this CEO had made his work his priority in life and, at the young age of 53, he was burning out. Neglecting the other aspects of his life had now cost him. He felt lost, disconnected and unmotivated.

To feel fulfilled and happy in life, six human needs must be met. They are: love and connection, learning and growth, certainty, variety, contribution and significance. In this case, all of these needs were being met through work. Our CEO was a classic workaholic.

CEO SOLUTION

Now in a personal crisis, the CEO realized for the first time that there was more to life than work.

He needed to take charge or continue to face serious personal, financial and/or physical consequences.

With assistance, he was shown how to start setting goals in all areas of his life: career, money, partner, friends and family, health, personal growth, physical environment and fun and hobbies. It was hard for him to think outside the context of work, but he persisted despite the discomfort.

The CEO then developed a 90-day action plan to achieve greater satisfaction in three key areas.

First, he made a commitment to work with a financial planner to sort out his finances and formulate long-term money strategies.

Second, he committed to getting a medical exam, one which was specifically geared to executives and could address the implications of his work profile and habits.

Third, he committed to having dinner regularly with each one of his kids and to spending more time nurturing friendships, important first steps to building deeper personal, non-work relationships.

By applying the same level of focus to his entire life, and not just work, the CEO felt more settled and in control. He vowed never to let work take over, and he encouraged his direct reports to achieve the same balance in their lives. Not only did he become a model for his employees, he also helped ensure they didn't experience the burnout that he had.



Executive Assistants are Critical to CEO Success

CEO CHALLENGE

A CEO had been working with his executive assistant for the past year and things just weren't working out well. Their personalities clashed, and her performance wasn't meeting his expectations, so they agreed to part ways during a very busy time in the company's business cycle.

This was the CEO's third assistant in three years, and the hiring process in each case had used up a lot of time that he really didn't have. He liked to be self-sufficient, so decided to go it alone and manage all his own administration.

Three months later, his office was piling up with paperwork, he had missed some important customer meetings and he was being told by his executive team that the whole company was suffering.

CEO MISTAKE

In hiring his last three assistants, the CEO had informally reached out to his network instead of using a formal recruiting process.

Because he didn't appreciate the potential value of a top executive assistant, the CEO hadn't paid close attention to the level of skill and experience of the job candidates. He also hadn't viewed the relationship as a partnership from which he had as much or more to gain.

In the case of each of his three former assistants, the CEO had also neglected to set any specific priorities to focus the assistant's work. As was his style, he worked somewhat independently while his assistants did their best to tread water.

CEO SOLUTION

Top talent is necessary for more than just your executive team. The best assistants can be a significant asset not only to the CEO, but to the organization as a whole.

View your assistant is part of your CEO "brand." As the gatekeeper and frequent first point of contact, your assistant is often the initial impression others have of you and your organization. With that understanding, it's not hard to realize that your assistant's work style and capabilities should enhance, not detract, from you and your brand.

First, it's essential to use an experienced recruiter who specializes in executive support. Focus on finding someone who is a great personality fit and is professionally trained to be an executive assistant.

Second, develop and train your assistant. Meet weekly to plan your time and then daily to check in and make sure both of you are on track. An effective assistant will help you set appropriate boundaries to manage your priorities, so be sure he or she understands those priorities. Ask your assistant for feedback regularly and let him or her know whether your expectations are being met.

Last, don't let a great assistant get away. Make sure you say thank you and acknowledge his or her efforts daily. Compensate well and recognize the significant contribution your assistant makes to your success.

How to Reinvent Your Company's Top Job

CEO CHALLENGE

It is not uncommon for a long-time leader to grow weary of the top job, particularly if the path to get there has been relatively quick.

Take for example this CEO, who had been in his position for six years and found himself really stuck. He loved the company and the business, and enjoyed 60% of what he did. But it was the other 40% that was driving him crazy.

He found himself losing patience with people. He was bored with the same old problems and the lack of new challenges. The always-extensive business travel was beginning to wear him down, and he found himself dreading board meetings, believing board members to be far too operationally focused and not strategic.

Meanwhile, the competition was heating up and business results were beginning to suffer. Clearly, this could not continue.

CEO MISTAKE

This CEO had a tendency to follow the model "if it ain't broke, don't fix it." And while most would realize immediately that the old adage no longer applies in a highly competitive and challenging marketplace, it also doesn't apply to one's career.

Because the business had been doing, until recently, very well, the CEO just kept on doing exactly the same job he had always done.

Furthermore, he had a habit of using his executive team as a sounding board, regularly venting to them about the parts of the job he didn't like.

Believing not much could be done, the CEO was losing motivation to address the issues at hand.

CEO SOLUTION

When you get stuck in your job as a leader, it's time to figuratively fire yourself from that job and create a new one. Sounds crazy perhaps, but see how this can play out.

In this case, the CEO was a member of a peer-sharing group and he asked for some advice. One of the other CEOs explained how she had been in a similar situation and had developed a list of the 40%—those activities that were dragging her down as well.

Her strategy had been to go to her executive team and asked them to step up and take on most of what she regarded as dreaded activities.

Much to her surprise, there was a lot of excitement and enthusiasm from her team to support her and relieve her of what she really didn't want to have to do any more.

As a result, she enthusiastically redefined her role with a focus on three key activities:

- developing a new strategy to deal with the increased competition;
- creating an "execution" culture throughout the organization to drive action; and
- attracting, retaining and developing talent to ensure successful strategy implementation.

From his peers, the CEO in the job crisis learned that it's common to feel stuck at times and that the journey to reinventing his job could not only be relatively straightforward, it could be positively invigorating and was absolutely necessary.



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STRATEGY & ORGANIZATIONAL DESIGN

How to Cultivate Better Business Growth

CEO CHALLENGE

The CEO of a company in a highly competitive industry, with less-than-compelling market drivers, knew that she needed a significant growth strategy. In fact, she believed that without such a strategy, the company would be out of business due to the difficult industry conditions.

At the same time, the board had made it very clear that it was expecting growth far beyond what had been achieved over the last three years.

She decided to hold a strategy planning session with her executive team, focusing on ways to grow the organization. To her disappointment, her reports spent the session focused on discussing the barriers to success and the company's past failures, refusing to entertain legitimate ideas.

The team was left uninspired, demoralized and no closer to avoiding disaster.

CEO MISTAKE

This CEO made a number of mistakes. First, she leapt straight into strategic planning without first getting buy-in to the goal of significant growth. Most significantly, not only did she fail to create a sense of urgency for change, she neglected to explain the board's expectation for significant growth.

Without agreement that such growth was not only possible, but also necessary, any discussion of strategies was virtually useless.

The second error was a failure to include all key stakeholders in the session. By limiting the planning to the executive team, when others in the company were much closer to customers and competitors, she ensured a lack of credible input and overall resistance to any subsequent plans.

CEO SOLUTION

After reflection and consultation, our CEO held another session and made the following changes.

First, she clearly defined the context for planning, making sure the team understood the board's specific expectations for significant growth.

Next, she created a sense of urgency for change by requiring that participants complete pre-work before the meeting. The team was asked to develop a SWOT (strengths, weaknesses, opportunities and threats) analysis relative to the company's top three competitors, all of which had already achieved significant growth. They also had to prepare a customer analysis, including a forecast of customer needs three, five and 10 years out. And, finally, they had to complete an industry analysis including competitors, suppliers, buyers, new entrants and barriers to entry to aid in identifying the organization's most important market drivers.

Next, the CEO invited top talent from the next level down. These were the folks who were accountable for the profit and loss of the business units and were a lot closer to the grassroots of the business. Not only did this bring much-needed perspective to planning, it would ultimately speed strategy execution.

In addition, external "rock stars"—people who had achieved significant growth in the same or a related industry—were invited to share insights and lessons learned as well as inspire the team to realize that significant growth was indeed possible.

More work? Perhaps. But the effort made planning infinitely more valuable in the long run with the result that the company's prospects were much better several months later.

Minimizing Executive Disruption when Instituting New Corporate Strategies

CEO CHALLENGE

The head of a large global company had been in his position for about a year and had spent much of that time developing a new three-year business strategy to accelerate results. Included in the plan were proposed changes to the roles of his executives, intended to align the organization structure with the new strategy. He got approval for the changes from the board and was excited to share the news with each member of his team.

He didn't get the reaction he expected.

CEO MISTAKE

The CEO sat down over dinner to tell one of his direct reports about the new role that had been created for him. The CEO knew that alignment of roles with the new strategy was critical for business success, and he thought that meeting with each executive individually would ensure each one was clear on where he fit in.

The executive was stunned when the CEO described the new role and explained that the board had already approved it.

"I can't believe you did this without even asking me for my opinion," the executive stated. "This role sounds like a demotion and a step backward."

The direct report went on to tell the CEO that his behaviour was disempowering and that he wasn't the only one who felt that way.

"I need some time to think about this before I can commit to anything," he said.

Rattled, the CEO decided to hold off on his plans to speak with the rest of his team until the situation was resolved.

CEO SOLUTION

A change in role represents a significant disruption in expectations when there has not been an opportunity to participate in the development of the role or influence the decision.

If the change happens to match the executive's expectations, initial frustrations may quickly turn to satisfaction.

But if the role isn't in line with where the executive sees himself, the result could be anger, disappointment and a sense of being powerless and victimized.

To minimize disruption when making role changes, our CEO should have given each executive the chance to discuss the plans, express opinions and influence final decisions before getting board approval.

With some coaching, the CEO took the following steps.

He met with each of his executives, reviewing current roles and identifying desired outcomes in alignment with the new strategic plan.

Together, he and each direct report developed the new roles to fill any gaps. They then discussed options for each individual.

They could stay on the team and either thrive in the new role or develop an action plan toward developing the necessary skills and experience.

Alternatively, they could leave the team because the new role didn't fit their skills, behaviours, experience or career plans. One executive chose this option.

These discussions led to some revisions in the CEO's plan and he had to go back for board approval. However, the plan was even better, and the remaining direct reports were on board and enthusiastic.

How to Get a Return on Company Investment in Social Media

CEO CHALLENGE

LinkedIn, Facebook, Twitter—employees who use social media at work can be a challenge. For one 55-year-old CEO, it had reached a crisis. Employees seemed distracted as they interacted with friends, browsed other job opportunities and tweeted away.

The CEO was certain that productivity was down and that employees should be completely focused on serving customers and doing their jobs. Plus, there had been instances of employees using social media irresponsibly.

Recently, he had been forced to fire a top sales person because of damaging photos he had posted to Facebook that depicted his antics after a few too many drinks at a work-related social function.

Overall, the photos made the employees, and the company, look bad. It was clear that action needed to be taken to manage the challenges presented by social media.

CEO MISTAKE

In response to the issues created by the use of social media at work, the CEO decided to block access to all social media tools during work hours for a 90-day period. His hope was that this would solve the productivity problem and eliminate the potential for employees to hurt the company brand through inappropriate use.

What he didn't anticipate was the backlash from staff. Over the next three months, three very talented employees, all aged 30 or younger, left the company.

Among their reasons: the ban on social media at work.

Employee morale began to decline, there was extensive complaining about the new policy and employees began restricting their work hours to a traditional nine-to-five day, no longer willing to give any discretionary time to the company.

CEO SOLUTION

Social media is here to stay. Among members of our CEO forums, 66% of CEOs and 85% of other executives are using LinkedIn to expand business networks, build new partnerships and gain new customers.

And when it comes to the Generation Y crowd, mixing work and social time is just how they live.

Telling them they can't be socially active while at work is akin to being grounded.

What's a baby boomer to do? Clearly there have to be limits on the use of social media, but what makes sense?

Here are a few tips:

- Learn from experts how companies are getting a return on the use of social media tools by using them to accelerate customer service, reduce costs and grow business.
- Develop a plan aligned with your business to use social media strategically.
- Establish very clear guidelines for social media use. Deciding who should use social media tools and how they should be used will prevent mishaps and maintain productivity.
- Build awareness of social media guidelines throughout the entire company.
- Praise responsible use and ensure consequences are clear if social media is used irresponsibly.
- Be an exemplar of responsible social media use.

Bridge Generation Gaps to Maximize Success

CEO CHALLENGE

A 60-year-old CEO was struggling with the attitudes of his much younger employees. "We need to fix these new generations. They are lazy, don't have a strong work ethic, feel entitled and spend their time on Twitter, Google and 'Spacebook.' They're focused on 'life balance.' Isn't that something you save for retirement?"

It didn't help that his management team was also composed of baby boomers who agreed with their boss. From their perspective, younger employees didn't seem to have any loyalty to the company, quitting only expecting to be hired back if things 'didn't work out.' The executive group could only hope that this tough economy would change the bad attitudes of the younger set.

The question was, would it? Did it need to?

CEO MISTAKE

This CEO's perspective could have cost his company dearly. There is a global war for talent going on in the marketplace, especially for leadership talent. Two-thirds of this organization's workforce was under the age of 44, including a full third under the age of 31. Expecting them to adopt boomer attitudes was not only unrealistic, it was dangerous. With this mindset, our CEO was in for a tough time attracting, retaining and developing top prospects for the long term.

CEO SOLUTION

To win the war for talent, it's critical to embrace the needs of your generation X and Y employees. There are three key generation clashes: life balance, career planning and technology. By tackling each one of them, this CEO was on his way to retaining the people he needed.

First, he developed an explicit life balance strategy for the organization, starting with the executive team and then cascading it throughout the company. He mandated that all employees, including executives, use up their vacation time. He set expectations among staff members that they were to adhere to more realistic working hours, minimizing overtime in favour of non-work pursuits. And he introduced flexible work arrangements such as part-time job sharing and telecommuting.

Second, he implemented an integrated succession and career planning strategy that included coaching, mentoring, job shadowing and the flexibility to move in and out of the company. Not only did this strategy resonate with the younger employees, it improved morale and increased abilities across the company.

Third, he championed the creation of a social media strategy to enable the responsible use of the new technologies, both personally and professionally, in the workplace. Accepting that Facebook, Twitter and other online outlets are here to stay, he found a way to allow them and even use them to the advantage of the organization.

This CEO saw his way through to accept and embrace the generational differences, rather than dismiss or try to change them. He realized that he was destroying the very relationships the company needed to nurture for the future. He learned that he had to view the organization's talent holistically instead of segmenting, judging and blaming specific groups. And, to show he was serious, he created his own Facebook page.

MACKAY CEO FORUMS – GUEST SPEAKER OVERVIEW FOR ALAN OISHI

April 29, 2014

Name of Presentation

Building strategic assets that drive sustained growth in equity value

Presentation Outline

The presentation would comprise the following steps:

- Introduction by the Forum Chair
- High level overview of the topics being presented
- Input from members to support customization of the presentation to their specific issues and needs
- Presentation (using flipchart, not PowerPoint) of Shirlaws' frameworks:
 - Stages of Growth; and/or
 - Valuation; and/or
 - Capacity Planning
- The style of presentation would be interactive (a balance of providing new perspective and asking questions to engage the members), including brief exercises for members to apply the frameworks to their businesses
- Discussion and Q&A: additional questions that have not already surfaced and facilitated discussion amongst the members

Value to Members

The value to members could include (depending on the focus chosen by the members):

- A deeper understanding of the normal cycle of growth and maturity of businesses that will provide new perspectives in where they have come from and what lies ahead
- Awareness of the strategic skills business require to achieve advanced stages of growth
- How a business is made up of business units, teams and individuals that are also at different stages of growth and the implication this has on business results and the opportunity it creates to accelerate growth
- How to break down a vision into seven key components
- Awareness of the link between vision and equity valuation
- The factors that determine whether (and to what extent) a business will achieve a discount or a premium to the benchmark valuation multiple for its given industry
- Understanding the two general types of strategy
- Awareness of the importance of understanding the current maximum revenue capacity of a business
- How to achieve controlled growth

Biography

In 2009, Alan joined Shirlaws, a leading international business coaching & consulting firm with coaches in 10 countries and clients in over 30 countries. Alan spent the previous 18 years at Colliers International where he held positions in valuation consulting, investment brokerage, corporate finance, eBusiness, and M&A before being promoted to the executive management team. In the five years prior to joining Shirlaws, Alan served as Colliers' Executive Vice President, Global Chief Operating Officer and was a member of the Board of Directors before taking on the role of Chief Executive, USA.

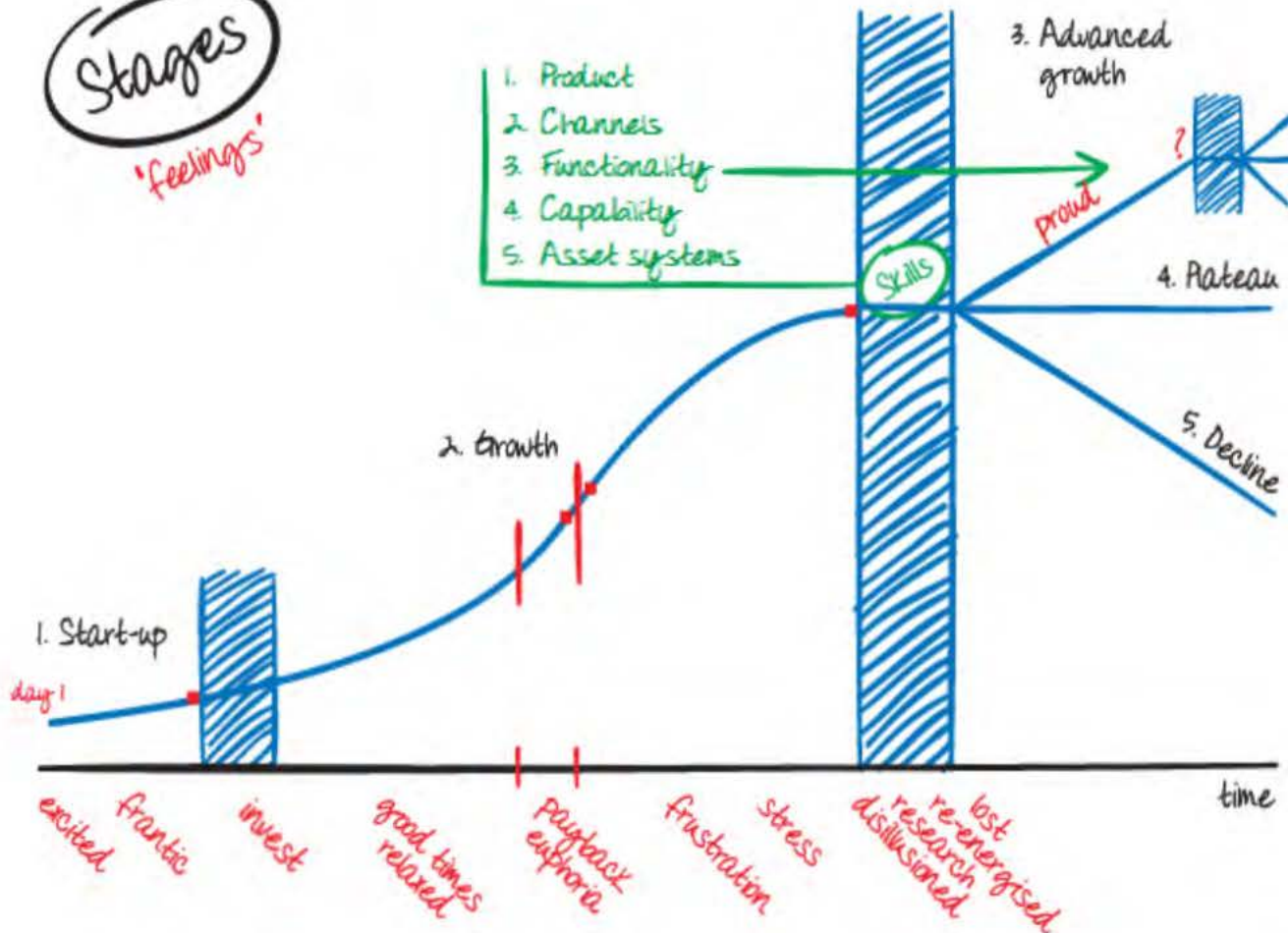
While serving as CEO, Alan was responsible for turning around a \$200 million business that was severely impacted by the onset of the global recession. Focusing on evolving the culture, improving internal channels and improving the capabilities of the executive team, Alan stabilized the business prior to shifting to a more entrepreneurial business where he could work with a diverse portfolio of companies.

Alan brings with him a wide spectrum of experience as his career grew from an entry-level analyst position to a senior executive, board member and shareholder. He was a leader of a business growing rapidly towards \$1 billion in revenue across 40+ countries and was known for successfully taking on challenging and strategic projects such as developing an eBusiness strategy, managing global acquisitions, managing a recapitalization of the balance sheet, starting and integrating new business units and restructuring business units that were not meeting expectations. Alan can relate to the board, CEO, senior executive team, operations management, sales professionals and functional staff alike.

After being a client of Shirlaws since 2007, Alan became a partner in Shirlaws in 2009 and now provides businesses and their leaders with tools and perspective to help them transform to new levels of prosperity. He also serves as the CEO of the Canadian operations of Shirlaws and a member of the Board of Navitas, the parent company of Shirlaws Business Coaching globally.

Stages

'feelings'



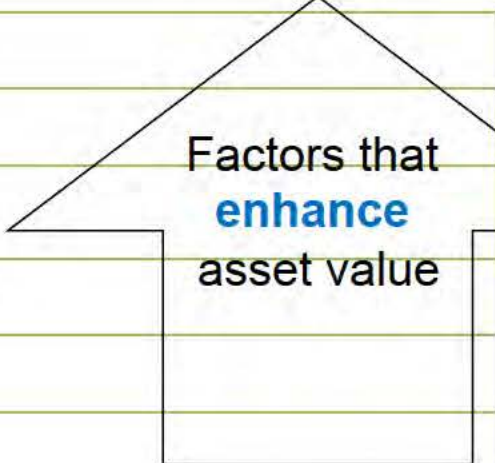
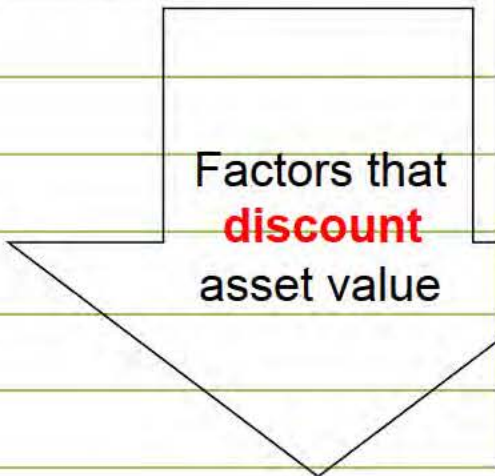
Shirlaws

Love business.

Valuation

A framework that looks through the lens of a potential investor, allowing a business to understand the best strategy to increase equity value, where to focus and how to build the necessary assets.

$$V = P \times M$$

V +7	Scale	 <p>Factors that enhance asset value</p>
V +6	Brand	
V +5	Channel Extension	
V +4	Product Extension	
V +3	Systems & Product Innovation	
V +2	Talent / Capabilities / Culture	
V1	Industry Benchmark	
V -2	Cost Mgmt	 <p>Factors that discount asset value</p>
V -3	Revenue Mgmt	
V -4	Assets	
V -5	Liabilities	
V -6	Confidence in Mgmt Team	
V -7	External Factors / Industry Shifts	

Shirlaws

Love business.

From: "Linda Oglov" <linda@oglov.com>

To: "Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>

Date: 10/28/2016 8:03:19 AM

Subject: MacKay podcasts + event on Nov 22

Attachments: Nov 22 2016 - CEO + Exec Breakfast Event Invitation (Vancouver).pdf

Hi Kevin - you may want to consider signing up for the MacKay CEO Forums weekly podcasts on leadership which can be found here <http://www.theceoedge.ca> Also MacKay has a number of events on the topic of Exponential Change coming up throughout the coming year including the breakfast event listed below on Nov 22. If you are interested in this one, or any other breakfast event, I would be pleased to register you as my guest. Unfortunately I won't be at the Nov 22 breakfast but I am sure you would meet people there you know and you might check with Joel Abramson who usually tries to attend the breakfast events. Just let me know. I will keep shooting this type of stuff to you. Kind regards,
Linda



We are Canada's highest impact & least time intensive peer group for results-oriented CEOs + Executives.

Exponential Change: How to be an Industry Transformer

Join us for a panel discussion with successful business leaders who will share their experiences. You will benefit from the CEO and Executive peer-to-peer networking and roundtable discussion of opportunities, challenges and best practices.

This is a by-invitation event for CEOs + their Executive Team.

TUESDAY

NOVEMBER 22, 2016

THE VANCOUVER CLUB

915 West Hastings Street
Vancouver BC V6C 1C6

7:00am – 7:30am

continental breakfast &
networking

7:30am – 9:00am

panel presentation & discussion

Dress Code: no jeans

PANELISTS:

- Eric Berke
Co-Founder & Managing Partner, TorQuest Partners
- Kathy Kinloch
President, BCIT
- Jean-Pierre LeBlanc
Co-Founder, Saje Natural Wellness
- Bill Tucker
CEO, Omicron Canada Inc.

HOSTED BY:

Nancy MacKay, MacKay CEO Forums

[REGISTER HERE](#)

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From: ["Linda Oglov" <linda@oglov.com>](mailto:linda@oglov.com)

To: ["Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>](mailto:Kevin.Quinlan@vancouver.ca)

Date: 8/11/2016 9:26:49 AM

Subject: Re: Apologies

Thanks Kevin.

Linda Oglov
604-288-7031

> On Aug 11, 2016, at 1:21 PM, Quinlan, Kevin <Kevin.Quinlan@vancouver.ca> wrote:

>

> Hi Linda, not a problem at all. Next Friday would be great. Hope your mother is ok. Talk soon

>

> Kevin

>

> -----Original Message-----

> From: Linda Oglov [mailto:linda@oglov.com]

> Sent: Thursday, August 11, 2016 8:30 AM

> To: Quinlan, Kevin

> Subject: Apologies

>

> Hi Kevin - I am so sorry not to call this morning. I had to fly to Ontario since my 88-year old Mom needed attention. I thought I would be free to call you at 8 PST but was still in an appointment w my Mom. Apologies and I look forward to our call next Friday at 8 am. I will be back in BC again. Apologies and have a great weekend!

> Linda

>

> Linda Oglov

> 604-288-7031

From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>

To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>

Date: 6/2/2016 10:49:24 AM

Subject: Re: Call tomorrow

No problem Kevin, understood. I am away June 9-24, meaning that our next call would be on Friday July 1 and since that is a holiday could we change it to Thursday June 30 at 8 am?



On 2016-06-02, at 11:46 AM, Quinlan, Kevin wrote:

Hi Linda, I'm flying out from Winnipeg tomorrow morning and realizing that I might be going through security when we're supposed to have our call. It's probably best if we cancel tomorrow's call as I can't guarantee I'll be on time. Does that work for you?

KQ

Sent from my iPhone

From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>
To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>
Date: 4/21/2016 4:15:24 PM
Subject: Re: Coffee

Perfect lets go for Wednesday at 10. Will send calendar invite. Thanks Kevin.
Linda

Linda Oglov
604-288-7031

On Apr 21, 2016, at 5:12 PM, Quinlan, Kevin <Kevin.Quinlan@vancouver.ca> wrote:

Thanks Linda! This week looks quite slammed – any chance we could do a 15 minute call in the morning next week?
Here are some times I have

Tuesday 8:30am-10am
Wednesday 8:30am-11am

Anything work in there?

cheers

From: Linda Oglov [<mailto:linda@oglov.com>]
Sent: Tuesday, April 19, 2016 12:54 PM
To: Quinlan, Kevin
Subject: Re: Coffee

Hey Kevin - be happy to! I can do a call any morning this week if you want to kick it off. In terms of meeting in person, next Thursday April 28 between 10:30-12 sometime works but I am then running a retreat for a few days so after that an in person meeting could be Tuesday May 3, again sometime between 10:30-12. Just let me know what works best for you. I look forward to it.
Linda

<image001.png>

On Apr 19, 2016, at 12:25 PM, Quinlan, Kevin <Kevin.Quinlan@vancouver.ca> wrote:

Hi Linda, do you have time for a coffee in the coming days/weeks? I'd like to talk about how I see the office team working in the future and opportunities for your guidance and strategy in that. Any days/times that work for you?

cheers

Kevin Quinlan
Deputy Chief of Staff
Office of the Mayor
City of Vancouver
Office: 604.873.7232
Cell: 778.995.2264
Twitter @VanMayorsOffice
Facebook: <http://www.facebook.com/VancouverMayorsOffice>
Website: <http://www.mayorofvancouver.ca/>

From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>
To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>
Date: 9/29/2016 1:09:37 PM
Subject: Re: reconnecting - call today?

No problem Kevin. I am here the rest of the day so call when it works for you - 604-288-7031
Thanks,



On 2016-09-29, at 2:03 PM, Quinlan, Kevin wrote:

Hi Linda, I'm stuck in a cab in Toronto about to go to my hotel - I won't be able to call at 215. I can do after 240 or we can reschedule, whatever is best for you. Again apologies for the last minute notice

Kevin

Sent from my iPhone

On Sep 29, 2016, at 12:31 PM, Linda Oglov <linda@oglov.com> wrote:

2:15 today PST works. Thanks.

Linda Oglov
604-288-7031

On Sep 29, 2016, at 9:25 AM, Quinlan, Kevin <Kevin.Quinlan@vancouver.ca> wrote:

Hi Linda, sorry about not landing a time. I could do 215 or 245 today? In Toronto for work so challenging to find a time in between meetings. Tomorrow is a possibility too - probably a 1 or 2 pm time

Failing that we could try again next week on Monday or Tuesday?

Sent from my iPhone

On Sep 28, 2016, at 12:20 PM, Linda Oglov <linda@oglov.com> wrote:

Hi again Kevin - further to our exchange below, do you have time for a quick call today? If so, just let me know what time works for you. Today is pretty good for me except NOT between 11-11:30 or 3-3:30. Any other time can work. As you

know, Katie is interested in some 1-1 coaching but we should discuss, as well as what you want to do for yourself going forward. Just let me know. Thanks,
Linda

<unknown.png>

On Sep 23, 2016, at 11:27 AM, Linda Oglov <linda@oglov.com> wrote:

Thanks Kevin. Yes Tuesday at 2:30 or later or anytime Wednesday afternoon works. Pls just shoot me a calendar invite for what works for you.
Linda

Linda Oglov
604-288-7031

On Sep 23, 2016, at 11:01 AM, Quinlan, Kevin <Kevin.Quinlan@vancouver.ca> wrote:

Hi Linda, sorry about the delay – things have been slammed in the past week. Hope you had a good time in Europe! I'm in Toronto next week and likely can't do a call Thursday or Friday morning, but could we connect Tuesday or on Wednesday afternoon? If not no worries we can find another time

cheers

From: Linda Oglov [<mailto:linda@oglov.com>]
Sent: Wednesday, September 14, 2016 9:02 AM
To: Quinlan, Kevin
Subject: reconnecting

Hi Kevin - hope things are well for you and the fall is kicking off in fine style! Just wanted to let you know that I am back from the European vacation (fabulous!) and happy to reconnect again if and when you are ready. I could start our Friday weekly calls again on Friday Sept 23? We have about a month left in our agreed 3 month time span. Thanks Kevin,
Linda

<image001.png>

From: "[Linda Oglov](mailto:linda@oglov.com)" <linda@oglov.com>

To: "[Quinlan, Kevin](mailto:Kevin.Quinlan@vancouver.ca)" <Kevin.Quinlan@vancouver.ca>

Date: 7/5/2016 12:52:55 PM

Subject: Re: This week

No problem Kevin, glad the move is done! Yes we can change the call time on Thurs - just sent a suggestion of 9:30-10:15 which will add some time to talk about the team-building session. I am flexible that day from 9:30-noon. I look forward to it,



On 2016-07-05, at 1:47 PM, Quinlan, Kevin wrote:

Hi Linda,

Apologies again about Friday! Thankfully the move is all done.

You mentioned needing to reschedule this Friday and seeing if we could do Thursday instead. I have a meeting from 8-8:45am; I could do a call at 7:30 or any time after 8:45am. Would either of those work for you?

We're also interested in having you facilitate a team-building session, and I'd like to discuss ideas for it with you on Thursday. Could we add that to the agenda?

Thanks!

Kevin

Kevin Quinlan
Chief of Staff, Office of the Mayor
City of Vancouver
Office: 604.873.7232
Cell: 778.995.2264

From: linda@oglov.com

To: "Quinlan, Kevin" <Kevin.Quinlan@vancouver.ca>

Date: 9/29/2016 1:39:52 PM

Subject: Updated Invitation: Call w Linda O. @ Thu Sep 29, 2016 2:40pm - 3:10pm (PDT)
(linda@oglov.com)

Attachments: invite.ics

This event has been changed.

more details » <[https://www.google.com/calendar/event?](https://www.google.com/calendar/event?action=VIEW&eid=XzhrcGplaDlzOGtyM2ViOW44aDlzZ2I5azg4cmoyYmEyOGtyajBiOWs4cDFqNmRobThkMmppZTFuNzAga2V2aW4ucXVpbmxhbkB2YW5jb3V2ZXluY2E&tok=MTUjbGluZGFAb2dsb3YuY29tY2E1M2Y0YjgyNTI2YzI1OGI2ZDkyZDU5MjcyZjBmMTY2OTY4OTAwZg&ctz=America/Vancouver&hl=en)

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Call w Linda O.

When Thu Sep 29, 2016 2:40pm – 3:10pm Pacific Time - Vancouver

Where Changed: Kevin to call 604-288-7031 (map <<https://maps.google.com/maps?q=Kevin+to+call+604-288-7031&hl=en>>)

Video call https://plus.google.com/hangouts/_/oglov.com/kevin-quinlan-l

<[https://plus.google.com/hangouts/_/oglov.com/kevin-quinlan-l?](https://plus.google.com/hangouts/_/oglov.com/kevin-quinlan-l?hceid=bGluZGFAb2dsb3YuY29t._8kpjeh238kr3eb9n8h23gb9k88rj2ba28krj0b9k8p1j6dhm8d2jie1n70)

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Calendar linda@oglov.com

Who • linda@oglov.com - organizer

• Quinlan Kevin

Going? Yes <[https://www.google.com/calendar/event?](https://www.google.com/calendar/event?action=RESPOND&eid=XzhrcGplaDlzOGtyM2ViOW44aDlzZ2I5azg4cmoyYmEyOGtyajBiOWs4cDFqNmRobThkMmppZTFuNzAga2V2aW4ucXVpbmxhbkB2YW5jb3V2ZXluY2E&rst=1&tok=MTUjbGluZGFAb2dsb3YuY29tY2E1M2Y0YjgyNTI2YzI1OGI2ZDkyZDU5MjcyZjBmMTY2OTY4OTAwZg&ctz=America/Vancouver&hl=en)

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Invitation from Google Calendar <<https://www.google.com/calendar/>>

You are receiving this courtesy email at the account kevin.quinlan@vancouver.ca because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at <https://www.google.com/calendar/> and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to modify your RSVP response. Learn More <<https://support.google.com/calendar/answer/37135#forwarding>> .