

# Performance MATTERS

THE STRATEGY ACTIVATION ISSUE

**BANG!**

**TiER1**  
PERFORMANCE



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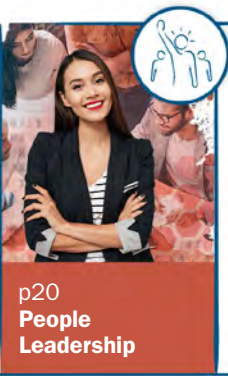
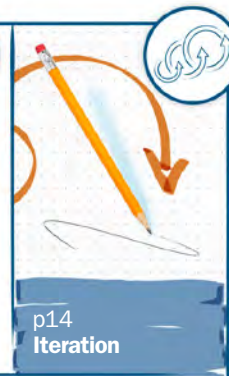
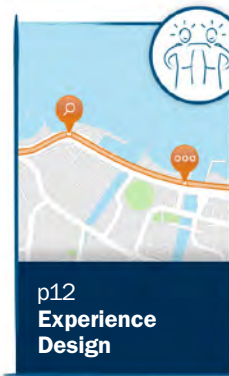
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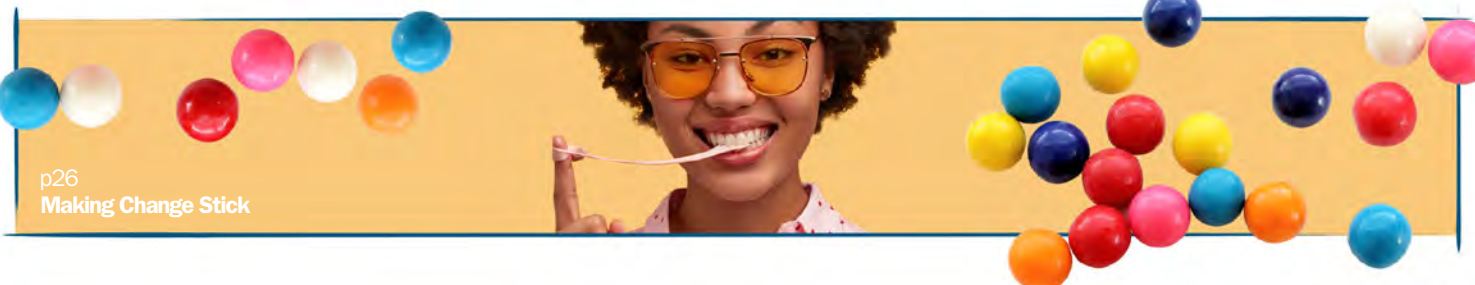
**STRATEGY ACTIVATION**



**HOW TO ACTIVATE**



**SUSTAINING ACTIVATION**



**MESSAGE FROM**  
*Greg*

The words “activity” and “activate” may look similar, but mistaking one for the other can mean critical failure when you need a win.

In most organizations, there is no shortage of **activity**. Work is always there, and everyone is busy doing something on any number of projects and assignments that (hopefully) create value for someone somewhere. Some of this “busy-ness” is critically important work that adds value...and some of it is unnecessary, or worse, counterproductive.

Likewise, every organization is looking to **activate** something. There may be a new set of priorities or initiatives that will drive new performance and results. Yet, to realize the potential of those strategies, organizations must wrestle with how to bring them to life. Overlaying the new on top of that “busy” system of work—and ultimately replacing it—is daunting.

This is the work of strategy activation: bringing strategy to a point of execution while maintaining the performance of the current business.

Strategy activation isn't just activity; it's more than delivering training or managing a process change. It's also holistic and multidisciplinary so that key strategic initiatives take root across every aspect of the organization. And it is done through people.

I hope this edition of *Performance Matters* will spark your activation process and help you think about not just how to define better strategies, but how to fully activate them.

*Greg Harmeyer*



# STRATEGY IS ACTIVATED THROUGH PEOPLE

by Greg Harmeyer



## about the author

**Greg Harmeyer** is CEO of TiER1. During his leadership, TiER1 has become a multi-year Best Places to Work recipient and member of the *Inc.* 5000 list of the country's fastest-growing privately held companies. He is passionate about unlocking the potential in people, teams, and ideas. He loves running, boating, coaching his kids' basketball teams, and being a dad.

ALMOST EVERY ORGANIZATION  
IS TALKING ABOUT THEIR STRATEGY:  
WHAT IT IS, HOW THEY ARRIVED AT A COMPELLING  
STRATEGY, THE LIST GOES ON.

We see organizations regularly invest tremendous amounts of time and money in forming strategy. And that investment is important; a well-constructed strategy is an essential part of growth.

Yet too often, we take for granted the critical element that makes strategy effective: the **people** who will bring the strategic vision to life by doing things differently and producing new results.

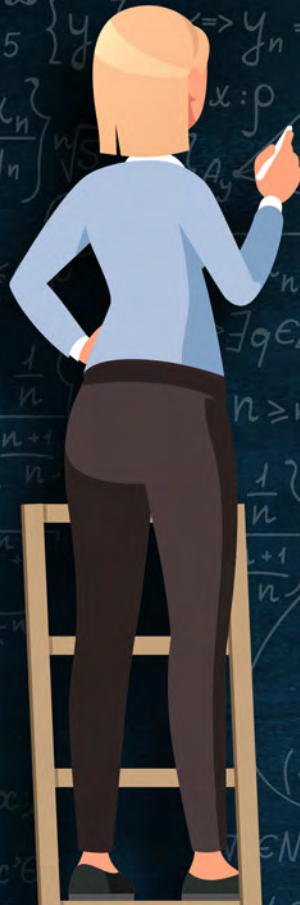
The idea of activating strategy through people feels fairly intuitive. Yet, how often are leaders talking about their "strategy activation" plan? How much attention is given to how this strategy activation will occur? How is neuroscience research taken into consideration to address why activating strategy is so difficult? Lastly, how do we know when and where it's working to help us reach our goals and the organization's potential?

To activate strategy through people, organizations are tapping into a broad range of tactics, techniques, and skills, such as branding, culture, technology, neuroscience, communication, and visual design. Whatever the approach, the key to eliminating the gap between strategy development and execution is moving people into action.

## NEED HELP BRINGING STRATEGY TO LIFE?

Leveraging a few fundamental concepts can strengthen your approach to strategy activation.

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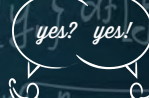
## ALIGN KEY STAKEHOLDERS

Alignment reduces conflict and creates a foundation for the efficient deployment of strategy. Without alignment, an organization will be bogged down by continuous internal meetings and endless debate.

Strategy activation starts with alignment across many levels:

- Aligning the board and executives on what the strategy is
- Aligning executives and other senior leaders on the culture, purpose, and principles that give shape to how strategy comes to life
- Aligning senior leaders and middle management on the how and why of strategy activation

*"We see organizations regularly invest tremendous amounts of time and money in forming strategy."*



## CRAFT A COMPELLING STORY

Too often we start strategic initiatives with a company announcement. The purpose remains high level and the intention is left open to interpretation. What winds up happening is the narrative is written by the recipients of the message. Confusion and tension begin to set in before things have even started.

Successful strategy activation depends on clarity, repetition, and storytelling to vividly articulate why the strategy makes sense. Consider including the following narrative elements:

- A clear connection to the organization's purpose
- Holistic branding to paint the vision of the journey ahead
- A layered communication strategy that reaches each individual where they are and helps them process where they will be going
- A series of compelling stories that gives shape and depth to the journey that is underway



## EMPOWER MIDDLE MANAGERS

Strategy activation is highly dependent on middle managers. Real work gets led in the middle of most organizations and executed on the front lines. That's where we interact with the customer. That's where processes work—or don't. That's where daily decisions are made that result in an efficient, high-quality, customer-centric organization (or result in something else).

Unfortunately, middle managers are generally overloaded and under pressure from many directions. They're expected to operate the business, advocate for change, lead people, and answer to other leaders—all while making sure customers are happy and quality is high.

It's essential to provide middle managers with significant support for strategy activation:

- Tools to support the front lines
- Skills to handle the pressures placed upon them
- Space to process their roles throughout the activation process



## BUILD PLATFORMS AND EXPERIENCES

Strategy activation should be part of the onboarding process of new employees. Employees need to be given a consistent story and hear consistent messages from your organization starting Day 1.

Robust onboarding platforms and employee support systems are essential to both the initial strategy activation and the ongoing (and inevitable) adaptation and change to the strategy. A well-orchestrated, synthesized onboarding experience will help employees see, hear, and live the strategy before their first day on the job.



## DESIGN THE EMPLOYEE EXPERIENCE

If strategy depends upon people, then it's essential to think through the employee's experience—and the entire ecosystem that surrounds them, including numerous systems and technologies. (After all, people don't work in a vacuum; their experience of how work gets done impacts their ability to bring strategy to life.)

Activation requires support systems and points of integration. Your organization's existing tools, technologies, and general infrastructure can be invaluable resources in the strategy activation process. Rather than seeing software as a barrier to be learned, design the employee's work environment to maximize their effectiveness.



## EMBRACE AN ITERATIVE APPROACH

Finally, recognize that strategy activation isn't linear; it's iterative. Neither strategy nor strategy activation is ever "finished." The key to leading strategy activation through your people isn't to worry about getting it all right up front. We're all playing the game as we re-write the game plan.

Make sure the process of strategy activation incorporates feedback loops whereby messages, ideas, priorities, and processes are deployed to the organization, and then data and information are gathered and fed back into the strategy activation plan (and the strategy itself). This will help your organization iterate the game plan.



## STRATEGY ACTIVATION IS DAUNTING.

So is strategy. So is business. Yet when we have empathy for the players—the people who bring your strategy to life—the important things rise to the surface. Taking steps to make their lives at work easier and empowering them to contribute will realize the full potential of your next strategy investment. **T1**

*"...the key to eliminating the gap between strategy development and execution is to move people into action."*





# METHODS & TOOLS FOR STRATEGY ACTIVATION:

## GETTING STARTED WITH

# STRATEGY ACTIVATION

by Jerry Hamburg and Katie Frey

Strategy is about “where to play and how to win.” But once these concepts are clearly developed, real strategic work has only just begun. That’s where activation comes in.

Activation brings “how to win” into precise focus by identifying the behaviors and detailed work required to make strategy a reality. It exists in the space between developing strategy and executing strategy, bringing clarity and alignment to strategic thinking. And it

transitions the effort of bringing strategy to life into specific, new behaviors through a medium of actionable plans.

The result of activation work is emergent execution—that is, budding new behaviors, routines, and organizational habits that lead to improved performance. Improved performance opens new potential. New potential yields new ideas and opportunities to start the cycle again.

To get started, first consider how to be intentional with activating strategy through people. Ask yourself, how might we...

- CREATE ALIGNMENT AND AGREEMENT ACROSS MULTIPLE LEVELS OF LEADERS?
- PROVIDE VISUAL CLARITY OF THE JOURNEY?
- TIGHTEN INTEGRATION INTO BROADER STRATEGIES?
- ESTABLISH PRINCIPLES FOR LEADING?
- IDENTIFY SPECIFIC NEW SKILLS AND BEHAVIORS REQUIRED?
- DEVELOP A DEEPER UNDERSTANDING OF THE ORGANIZATION'S AVAILABLE RESOURCES AND OBSTACLES?

No matter the type of strategy you're looking to activate, it's crucial to recognize up front how complex it is to get the “people side” right. You'll need to find the right tools that help you understand the various factors that influence how employees experience strategy activation.

Strategy activation is hard enough when you're going from A to B (where the desired end state is clear). Then there are very complex, interconnected, and large-scale strategic transformations, where the desired end state is ill-defined, uncertain, and evolving. (Examples include M&A and joint ventures, subsidiary integrations, and large-scale internal transformations or “game changers.”)



### STORYTELLING

**Taking the strategic vision and developing a clear story of what it looks like when fully realized.**

People want to connect with ideas in a deeper way. Help them by identifying the central “characters” (key people or roles) for bringing the strategic vision to life.



### PERFORMANCE FACTORS

**A set of diagnostic tools for assessing the central characters from the inside out: their personal environment, roles, organization, and the world around them.**

This brings forth the work to be done in an iterative process as you identify how all the factors affect someone's ability to do what you need.



### PRINCIPLES

**Concepts that bound and frame the path forward.**

Bringing principles to the surface helps facilitate dialogue across senior leaders. This creates tangible points of alignment as well as a framework for how the strategy will look in practice.



### LEVERAGE POINTS

**The most significant resources that the organization has at its disposal.**

This includes identifying priorities and potential tension points. Identifying these points provides clarity around what will make strategy activation possible in your organization.



### KEystone BEHAVIORS

**What individuals will need to do as part of the new strategy being activated.**

By documenting keystone behaviors, you will be able to design the right performance environment to support employees in adopting new behaviors.



### JOURNEY MAPPING

**A visual representation of the path to get where you want to go.**

The journey map is not a 50-page report; its purpose is to give a clear path that everyone can continually reference. It can be refined and adapted over time.



### ENERGY MAPPING

**Identifying the forces, energy, and resources that the organization has (and the magnitude of each) for activating strategy.**

This includes mapping the resistance and barriers that may be holding the organization back. The energy map is an iterative tool that guides dialogue around where work needs to be done.



### MVP AND PROTOTYPING

**Conceiving a minimal viable product (MVP) for your activated strategy along with a clear test hypothesis.**

These tools allow for agile design, development, and testing of the strategy.



### METRICS

**Critical indicators of success.**

Enumerating metrics will ensure that existing systems provide timely feedback to those in key roles. This allows the organization to stay agile and iterate through change.

## about the authors



**Jerry Hamburg** is Managing Director for Solutions at TIER1. For 20+ years, Jerry has guided dozens of organizations across a broad range of industries and sizes in crafting results-driven performance solutions. He's passionate about helping people do their best work and reach their full potential.



**Katie Frey** is Managing Director for Strategic Growth and the Strategic Change Lead at TIER1. Her experience spans a wide range that includes organizational development, operations, HR transformation, culture, and employment engagement. Outside the realm of strategic change, you'll find Katie is an adrenaline junkie.



## STRATEGY ACTIVATION HAPPENS THROUGH PEOPLE,

and people are empowered to activate strategy through experiences that are holistic, role-based, and business-driven. As you begin the activation process, you can leverage these tools and methods to create experiences that enable your people to build the habits, mindsets, and behaviors necessary to activate your strategy. **T1**

# MOMENTS THAT MATTER IN STRATEGY ACTIVATION

Our favorite stories of meaningful moments, from TIER1ers in the field who helped facilitate them.

Organizations are constantly evolving, and each organizational change sends ripple effects throughout an organization. These ripples can be seen through thousands of small changes in people as they do their best to adapt and evolve in their new environment.

To help their people, leaders articulate and refine big concepts, such as vision statements, organizational values, operational principles, and cultural characteristics. Yet these important concepts don't mean anything unless they are deeply understood and embedded in the hearts and minds of people.

Employees bring to life the organization's strategies and vision statements through daily actions and interactions. The through line of work is a series of **moments that matter**—meaningful experiences that help people as individuals and as teams. They may seem like small moments, but over time they can add up to something powerful: shared convictions, meaningful connections, and new habits.

We asked TIER1ers to share their stories of moments that matter in activating strategy through people. Here are some of our favorites.

## CULTURAL ALIGNMENT

Our client wanted every employee to feel ownership of their company's existing values. The size of the organization allowed us to do something a little unconventional: we invited employees to share how they felt about each value, with the promise that their feedback would be taken all the way to the CEO.

In a series of workshops, each with approximately 20 employees, we reviewed the company's seven values and asked everyone to share:

- Where do you see this value in action at the company?
- When are you awesome at doing this?
- What does this word mean to you?
- Where can you do better with this value?
- How could our company do better at living out this value?

As employees shared with their peers, everyone aligned to a shared vision of what the values could mean. Throughout each workshop, we kept a running list of themes, repeated insights, and potential organizational blockers to the values. That list was provided to the CEO and other senior leaders of the organization, and employees were invited to be part of the conversation to provide more insight.

These workshops facilitated numerous meaningful moments for employees to come together as a team, amplify positive habits, address negative ones, and discuss their values.

— Laura Hoppa and Kris Henninger

## ORGANIZATIONAL CHANGE

Time and again on projects, I've seen that change is perceived as meaningful if people believe that the change is leading them to something better, that the effort is worth it, and that the gains outweigh what might be lost.

To create meaningful moments, engage people in the dialogue around not just the change itself, but the reasons behind the change. Help individuals craft more meaning by inviting them to share personal experiences as well as feedback with this change or previous changes. Then, be transparent in how decisions will be made and how their feedback will matter throughout the change.

Also, make space for others to get involved and help lead the change as sponsors, champions, or pilot users. This builds trust and gives individuals purpose, handing back some of the control they may feel like they have lost in the process of evolving and adapting to new ways of working. Including others also builds community, which is key to promoting a positive experience for those going through large-scale change.

Finally, don't forget to celebrate achievements together! Recognize when the desired behaviors are showing up, and provide feedback, contribution, and support to individuals and groups.

— Molly Winter

## PERFORMANCE MANAGEMENT

When we're trying to change people's mindsets and actions, I've found that what matters most in the learning moment is the stories that people tell themselves. If we can guide and influence those stories, then we can change how they think about their role and their value within the organization.

For example, a software development company recently refreshed their corporate values to include agility. But, their performance management process was too traditional and static to drive their strategy of continuous improvement. They wanted teams to facilitate more conversations around individual and collective performance—not just an annual performance review between managers and their direct reports, but regular feedback from teammates and peers as well.

Their approach to getting everyone on board with the new process? Rather than putting everyone in a single training event to "roll out the change," they knew going in that it would be more effective to craft multiple, small moments along the journey that allow people to try out new behaviors.

Changing those stories happens in small, meaningful moments over time—and we can (and should) construct those moments intentionally with the right story in mind.

— Mike Divine

## PEOPLE & RELATIONSHIPS

The kind of conversation you offer with a team member who is struggling to perform will look and feel very differently if that team member is struggling with a personal issue. I love helping clients figure out how they can help their people step into better conversations during pivotal moments, so that everyone is able to achieve their goals.

— Dustin Shell

There will always be those moments in a project where the unaccounted for happens. (Maybe it's a new opportunity or perspective that we didn't have before; maybe it's a roadblock.) How we handle that need for flexibility makes all the difference going forward. It's a big moment where trust can be formed or broken.

— Zac Ryland

The methodology and processes we follow create moments that really matter for clients, because it's about the connection points between our team and theirs throughout the project. Staffing a project is a powerful moment; we're putting together the right team for the job, and the work depends on the team we staff. Project kickoff is another moment that matters, because it aligns everyone's expectations for what the work is and how it will get done. Checking in throughout the project matters, as does holding a "lessons learned" meeting with the team at the end of the work effort.

— Grant Simmons **T1**



# MAKING THE ASCENT

## PAYCOR ACTIVATES GROWTH THROUGH ONBOARDING

The onboarding journey at Paycor demonstrates what investing in your people can do for them and the strategy of the organization. As a provider of HR software and online payroll services, they not only help clients create meaningful employee experiences, they live it themselves. New hires to the Paycor Sales Team experience this firsthand as they go through Paycor's eight-week onboarding program, The Ascent.

From Day 1, new hires feel inspired to start the journey—even though the company's product line requires learning an extensive breadth of product knowledge. Paycor's immersive approach to onboarding allows new hires to jump into the sales process, building relationships and completing

meaningful work as early as Week 1.

This reimagined experience launched in 2018 as a response to the company's strategic focus on growth. The Sales Team

partnered with the Learning and Performance Team, led by Mark Wilson, VP of Organizational Development and Learning, to empower new sellers to achieve sustainable, consistent growth and serve even more clients.

**"Our goal was to design a hands-on program built around our sales process. We're now delivering learning at the right time and creating space for new sellers to apply it in the field quickly."**  
 -Mark Wilson, VP of Organizational Development & Learning

Ascent is designed with a blend of preboarding activities, instructor-led orientation, observation, mentorship, role-playing, real-time feedback, gamification, and immediate application

of the information. New hires complete the immersive journey with a cohort of peers. They are guided with a one-stop portal and build muscle in the habits needed to meet the company's strategic goals. New sellers finish onboarding having not only built team relationships,

but also having established their first clients—accelerating time to proficiency.

» I'M CONNECTED WITH MY TEAM.

» I HAVE THE TOOLS AND MAP I NEED.

» I'M EXCITED FOR THE JOURNEY.

## HERE'S WHAT WE LOVE ABOUT THE PAYCOR EXPERIENCE.

### It closes the gap between "training" and "on the job."

Knowledge is critical to success; so is practical experience. By timing the information over a cadence of eight weeks, new hires perform activities that intentionally focus on conveying institutional knowledge while also facilitating real-world application of knowledge. This accelerates the transition into the new role, since new hires gain experience with the software, technologies, and activities they'll need on a daily basis.

### It provides support while building accountability.

Recognizing the importance of outside support throughout the onboarding journey, Paycor empowers managers and mentors to provide feedback every step of the way. There's built-in accountability to ensure new sellers are equipped to complete assignments. Tapping into their competitive side, new hires earn badges in four competency areas and check their progress against other team members on a digital leaderboard.

### It facilitates relationships.

Many new members of the team are located remotely and often work from home. The onboarding experience ensures that every new hire, no matter their location, is connected to the team and given day-to-day visibility into the culture and colleagues who are modeling best practices that are integral to success.

**"We're thrilled with how this program is launching new sellers' success at Paycor, while also allowing us to continue to activate our growth strategy."**  
 -Scott Rudy, Chief Sales Officer

### It builds connection to Paycor's process, culture, and values.

With an organization as successful as Paycor, they know that both tactical elements and their client-centered values are important to realize their growth strategy. A great culture is at the heart of the company. Ascent builds those elements into the experience.

### It leverages technology to scale.

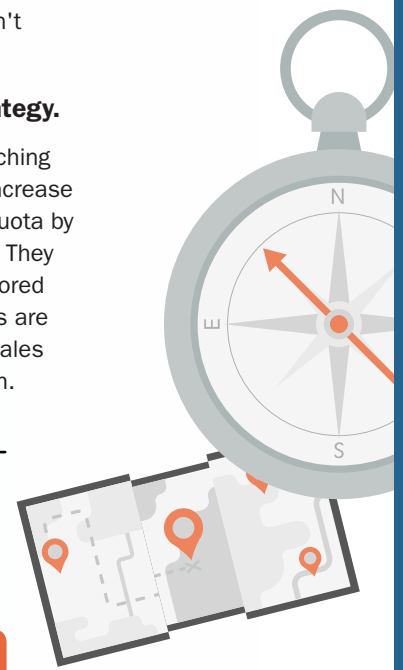
Onboarding success hinges on the relationships and experiences that are facilitated. The integration of technology is critical to create a consistent experience as the company grows. The "home base" for the entire onboarding experience is housed in an online portal and supported by a comprehensive OneNote guide. In addition, it has created transparency to metrics that weren't available in the past.

### It's effective in activating strategy.

Within the first six months of launching the program, Paycor saw a triple increase in new hires meeting their sales quota by the time they finished onboarding. They also found that individuals who scored top marks in the program activities are now leading the pack in meeting sales quotas, supporting Paycor's growth.

**The Ascent experience is designed to elevate new hires throughout their career. That it does—and the true value is in the excited, engaged, and productive employees who are living out Paycor's mission, vision, and growth strategy. T1**

» BE SURE TO CHECK THEM OUT AT [WWW.PAYCOR.COM](http://WWW.PAYCOR.COM).



# → STRATEGY ACTIVATION THROUGH EXPERIENCE DESIGN

○ YOU CREATED  
 ● THE MAP, BUT  
 ● YOUR PEOPLE  
 ● HAVE TO REACH  
 ● THE DESTINATION.  
 ● WILL THEY?

by Laura Hoppa



## about the author

**Laura Hoppa** is a Principal Performance Consultant at TiER1. She's known for activating strategies that truly move organizations forward. With 20 years of communications and marketing experience, Laura has helped design moments that are meaningful, important, insightful, celebratory, surprising, fun, and results-driven.

**YOU'VE GOT A VISION FOR HIGHER PERFORMANCE, AND YOU'VE LAID OUT THE STEPS TO SUCCESS. YOUR STRATEGY IS SET; NOW IT'S TIME FOR THE ORGANIZATION TO PUT IT INTO ACTION.**

Realistically, this strategy is going to require a lot of people to do something new or different (all strategies do). And that's where things get sticky—because frankly, the people part is the real challenge.

People are messy, complex, and unpredictable, and getting them to change is hard. How in the world will you control all of this so that everyone is following the plan for success?

**WELL, HONESTLY, YOU WON'T.**

It's not that strategy activation is impossible; it's just that it doesn't happen by exerting control. Rather, it happens when you offer people just the right experiences, at just the right moments, changing their minds in ways that lead to new actions and behaviors. This work is known as "experience design."

Too often organizations miss the boat here, thinking that strategy activation depends on rolling out new expectations and directing everyone's compliance. But humans resist being pushed (literally). There's an instinctive response to dig in our heels and push back. That's why great leaders know how to influence and pull someone forward.

**SO WHAT WORKS BETTER?**

When we want someone to move through a journey to a specific destination, it's more effective to shape the path than to shove the person.

Shaping that path begins by noting how emotions, beliefs, knowledge, and motivations impact someone's choices and actions. Then, harness that understanding within the context of your unique organization, so you can support your people in adopting new behaviors and habits.

If you think it all sounds pretty deep and requires a high level of emotional intelligence, empathy, and human behavior awareness—well, you're right. But it's no more than is required of great leaders every day.

## HERE ARE SIX CRITICAL STEPS OF EXPERIENCE DESIGN FOR STRATEGY ACTIVATION:

### 1 | DEFINE SUCCESS

Before you do anything else, be clear on the future state or desired goals. Describe the metrics for success, the timing of the journey, and the rewards that await your organization at the end.

### 2 | UNDERSTAND YOUR PEOPLE

Next, "get into the shoes" of the people who will carry this effort. Define your impacted audiences (often this is by role or function) and explore:

- What are their unique challenges, pains, hopes, desires, and motivators?
- Who influences them most?
- How are they already equipped for the envisioned future, and where do they have gaps?

Create a single persona to represent each impacted audience, and name it, so the "character" becomes more real and human to you (Fran the Frontline Manager, for instance).

### 3 | ASSESS THE LANDSCAPE THEY ARE ABOUT TRAVEL

Keep Fran in mind and take an honest look at the various organizational factors that will influence her performance on the path ahead.

**Recommended route:** Set some boundaries by acknowledging what's fixed about Fran's daily reality at work. Note the annual events on your calendar and the appreciated aspects of your culture, because you can leverage them—even amplify them—as you design the journey ahead.

**Traffic updates:** Be open to identifying the organizational roadblocks that could impede her progress. Making these issues a priority will clear the way for her to move forward. From Fran's perspective, is there an operational structure that will block her ability to perform tomorrow's process? Does her compensation plan reward the wrong behaviors? How might such issues be addressed?

### 4 | PLOT MILESTONES

If you haven't already, break down your big vision into a series of smaller milestones aligned to results, necessary behaviors, and targeted dates or time spans. What are the incremental results needed? Then consider, what are the various actions Fran must take to achieve these results over time?

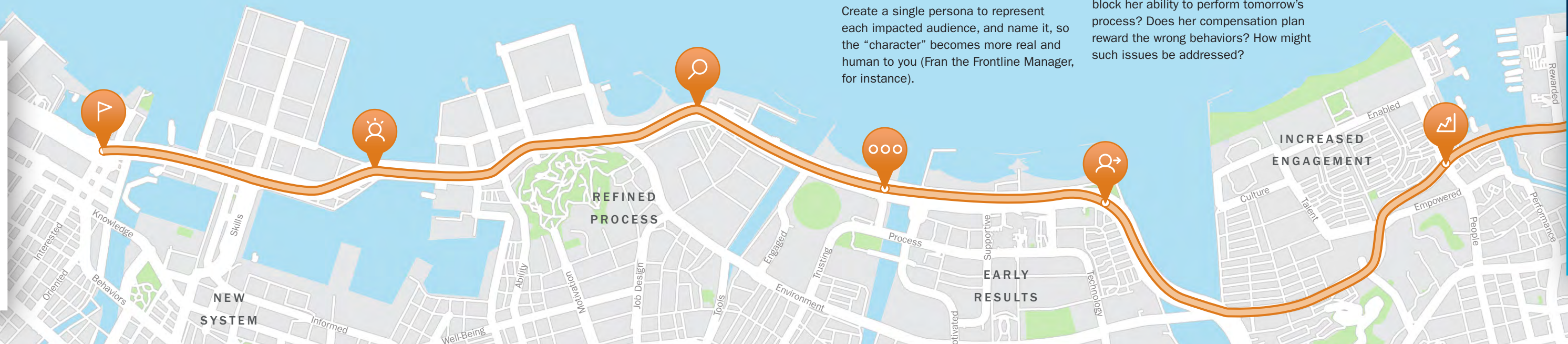
### 5 | CHART THEIR JOURNEY

Imagine what would inspire Fran and her peers to follow along each step of the journey. How will they need to connect emotionally, change their beliefs, grow their trust, increase their understanding, or amplify their motivation?

### 6 | SUPPORT THEIR PERFORMANCE

As you work through the experience design process, determine which experiences will be the most impactful and pivotal to Fran. Consider these her "moments that matter" and focus your energy here to best support her success.

In these moments, how might you create experiences that will foster the internal journey your organization is targeting? When is it critical for people to trust the overall vision? Share the why, how, and what of this effort. Is there a time when they should increase their knowledge or skills? Arrange for fun, meaningful learning support.



## YOU'RE THEIR GPS

Your vision has pointed the organization to a destination, and your strategy maps the way. But if you simply yell, "Go," your people will likely struggle to reach the end. They'll travel more quickly (with less risk, cost, waste, and drama) if you know just when they'll need what...which is exactly what you'll discover when you engage in experience design. That's why it's the key to activating your strategy through your people. **T1**



# ITERATION: YOUR MVP FOR ACTIVATION

by Brad Knueven

At the intersection of business innovation and people-centered strategy activation is the movement of the Lean Startup, which enables organizations to behave more nimbly by learning what customers want—intentionally, rapidly, and iteratively.<sup>1</sup>

Organizations, particularly big and established companies, benefit from integrating these practices into their business to innovate products or services. However, often they stumble when trying to accelerate the adoption of these practices at scale across their workforce, thanks to a misapplication of the minimum viable product (MVP).

The common understanding of MVP is related to the innovation itself, the product offering (or feature). The innovation MVP is all about enabling a full iteration cycle of the build-measure-learn customer-feedback loop with minimal time and effort invested before taking the full product offering to scale.

<sup>1</sup> Eric Ries literally wrote the book on this concept in *The Lean Startup*.

Issues emerge when an MVP for an activation solution (or the activation MVP) does not consider the complex nature of people and the ecosystems in which they currently exist. To test their activation hypotheses for how to best bring the business strategy to life through their people, organizations can unintentionally focus on a limited vertical slice of the full solution, rather than a holistic multidimensional view.

Think of it like a chef developing a recipe: To understand if a new dish (say, honey-glazed chicken) is worth the precious menu real estate, taste-testers need to experience more than simply a slice of roasted chicken. The dish must include all the aspects that make it **honey-glazed chicken**: honey, paprika, salt, oil, correct serving temperature, a complementary side, and the perfect wine pairing! Similarly, your people need to “taste the whole recipe”—or experience the wholeness of the activation solution—so you can iterate, refine, and ultimately invest in the most effective approach.



## about the author

**Brad Knueven** is a Principal at TIER1. He is a seasoned leader and development executive who has served clients in finding the right solutions and opportunities in IT, human capital, and program execution. On the side, Brad roasts his own coffee beans and even restores vintage garden tractors.

## CHOOSE YOUR MVP

**Not all MVPs are created equal.**

Can you spot which of the following from the list are true activation MVPs?

**A**

Communicating a new process during an all-company event

**B**

Embedding activities around new mindsets in an existing team meeting

**C**

Giving new hires time during onboarding to practice desired behaviors

**D**

Delivering an eLearning course to frontline employees

**E**

Mandating attendance to a one-day seminar

Answer: B, C

1

Consider a day-in-the-life of your intended audience. How are things changing for them? How will you empower them to embrace the change being asked of them?

3

Personal experiences are holistic by nature. What experiences are designed into the solution? How will you engage people's hearts and minds? **T1**

2

What do you want people to learn? What are you trying to improve? How might you build in habitual, repeatable performance?





# CULTURAL ALIGNMENT

Reading the “culture clues” is an important part of solving the people side of the M&A equation.

by Katie Frey

In mergers and acquisitions, doing due diligence traditionally involves a financial and strategic assessment. We ask specific questions—What are the risks and liabilities? What are the market opportunities?—that are useful in considering some factors. Yet, if we don’t know how to assess and manage culture with an eye for alignment and integration, the people side of the M&A equation can come up short.

People are a strategic consideration during M&A. Executives rank the ability to manage culture as more important to M&A success than financial or strategic factors, but they also acknowledge that they tend to undermanage this critical aspect.<sup>1</sup>

Cultural due diligence is an emerging thought, and there are a lot of unknowns about how to do it. The process requires more than a comparison of each company’s

articulated values or mission statement. That’s because an organization’s culture is reflected in what’s valued **and** what’s practiced. Those components may be aligned on the surface, but the culture for each organization could be dramatically different. After integration, those differences will impact the collective organization’s ability to deliver value to customers, stakeholders, and employees.

<sup>1</sup> Cartwright, S., & Cooper, C. (1996).

## VALUES *and* ACTIONS MATTER

It’s important for us to read these “culture clues” early on to mitigate the impact on all the people involved. Doing cultural due diligence means looking at the values that each organization professes, as well as how those values are lived out at all levels of the organization. Which means we need to talk about habits, or the ways in which people live out their values.

As individuals, teams, and even as organizations, we form habits that align with what we value. The impact of those habits can differ (for example, an individual refusing to use video conferencing versus an entire organization of people not using it).

A basic operational “habit” or process is how decisions are made. Let’s say two companies are going through M&A. Company A’s habit for decisions is that the person in the room with the highest rank or level makes the final call. Yet Company B’s culture encourages the “person closest to the customer” to make the call. These two organizations have fundamentally different principles or values in decision-making, as well as different habits in seeing those values come to life. When you attempt to blend those cultures, there may be clashes in understanding and decision-making authority, unless those differences are identified and managed ahead of time.<sup>2</sup>

Here’s another example: Company A places high value on workplace flexibility, and it’s culturally acceptable to work from home as much as possible. The organization even offers financial incentives for doing so (meaning workspace rent is lower with more employees working from home). It impacts several aspects of operations. And the result is a culture that looks and feels very different from Company B, which values face-to-face contact in the workplace and limits the number of hours employees may work from home.

<sup>2</sup> Stahl, G. K., & Voigt, A., (2008).



## CONSIDERATIONS FOR CULTURAL *due diligence*

To get a deeper look at a company’s culture during the M&A process, take stock of the following components and ask yourself, How are these elements showing up within this organization?

- Rites and rituals (e.g., celebrations, activities)
- “Heroes” (those who are recognized as personifying the truest form of values)
- Communities and networks (formal and informal)
  - » How does the company convey the necessary information to get the job done?
  - » What about social outlets and interaction between others?
  - » How are these networks bringing new members into the culture and reinforcing the organization’s cultural messages?
- Norms (the “rules of engagement” in an organization, often articulated in the form of policies and procedures)
- Stories, myths, and legends (company history and other stories that embody the organizational culture and emphasize what the organization values)

A thorough assessment of the culture clues can help organizations intentionally plan how they will evolve together. This requires a commitment from leadership to invest the time and energy required to align around an integrated culture that will fully activate the broader strategy.

## READING THE *culture* CLUES

Every M&A deal is unique. What (and who) you will have access to during the due diligence process varies, and sometimes we see only part of the picture. Pay attention to what’s glossed over or taken as a given. Those are the things that often carry the heaviest cultural weight or have the most significance to employees.

The answer to successful M&A isn’t necessarily to find a partnering organization with a similar or compatible culture. Rather, success depends upon the intentional management of cultural differences that aligns people, builds understanding, and promotes creative synergies. [TI](#)



### *about the author*

**Katie Frey** is Managing Director for Strategic Growth and the Strategic Change Lead at TIER1. Her experience spans a wide range that includes organizational development, operations, HR transformation, culture, and employment engagement. Outside the realm of strategic change, you’ll find Katie is an adrenaline junkie.

yes? yes!

# STORYTELLING TO ACTIVATE YOUR STRATEGY

BY LIZ ROSENAU

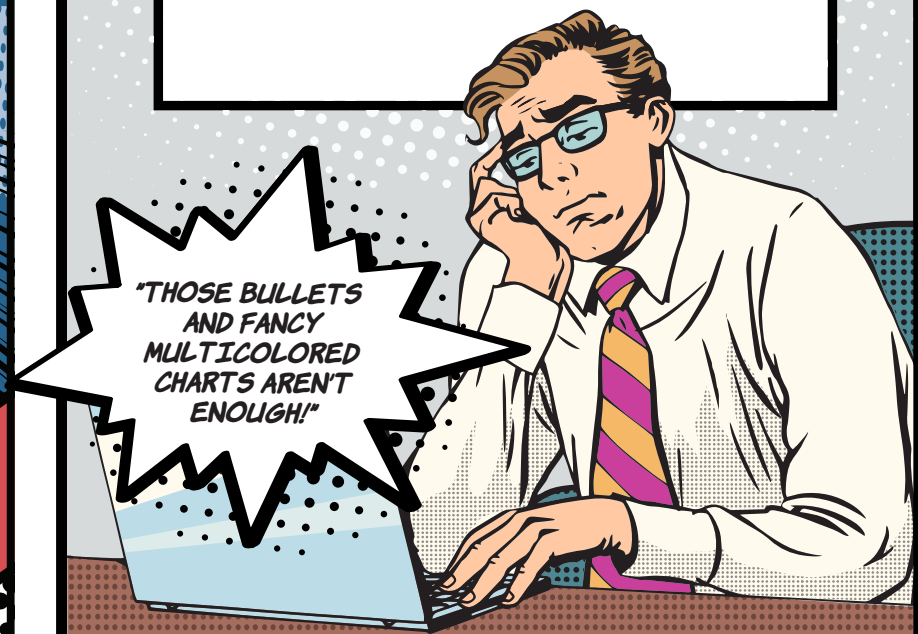
SPECIAL EDITION



**B**efore people can start carrying out your strategy, it helps if they understand what they're actually being asked to do, where you're taking them, and how you'll get there. It's not as simple as just telling people what you want them to do, however. Facts can teach, but stories help you and your audience get on the same page. This is nothing new, but it gets forgotten in our rush to deliver information in the same old ways. We gather our stats, throw some bullet points on a slide, then walk away hoping everyone understands (and will run with it).

I'm just going to say it: those bullet points and fancy multicolored charts aren't enough. Tell people what you want them to do, and they might remember it; illustrate where you're headed with a story, and they definitely will. Keep reading to see the power of storytelling in action.

"THOSE BULLETS AND FANCY MULTICOLORED CHARTS AREN'T ENOUGH!"



## SHOW THE ACTION

A client wanted to show employees how to live the company's values and guiding principles as they delivered healthcare. We could have created a handout that listed all the ways employees could do that, but we knew stories would be far more powerful. So, with the client's help, we discovered anecdotes of people across their organization who delivered great care—and not just physicians, but care coordinators, IT specialists, and pharmacy program managers, too—while embodying the company's values and principles. The stories illustrated how even employees who didn't have direct contact with customers were making simple choices that touched lives in a big way. Instead of just telling employees the "what" (listen more, take initiative, deliver above and beyond customer service), the stories showed them the "how"—what it can look like for them.



## MAKE IT PERSONAL

Another client wanted to revamp a three-day instructor-led training for newly promoted upper-level managers. We took a training that was previously pretty lecture-heavy and wove in more opportunities for stories, because we knew—not to sound like a broken record here—people absorb more information when it's delivered in a story instead of just some slides on a screen. We also encouraged facilitators to tell personal stories related to the concepts, especially if it was a tale of what not to do. Attendees responded with glowing feedback. Many talked about how they felt inspired to lead differently; some remarked that the facilitator's vulnerability in sharing personal stories showed them they could do the same with their teams. "There were so many useful tips and principles that were brought to life through stories," one person said. "It was so helpful seeing storytelling taught as a leadership tool," said another.

## CONCLUSION

So next time you're telling people something new, walking through a new initiative, or leading others on a journey, use a story. Draw on your own experience, use a metaphor, or even try a fairy tale to make the lesson stick. It's a lot more effective—and fun—than just using those bullet points. **T1**

## GET CREATIVE

It's not just real stories that help you activate your strategy—metaphors, similes, and analogies work, too. Comparing something new or complex to something people are familiar with always makes things a little clearer. For example, "Changing roles in this division is a lot like moving to a new house: life will be better once everything's unpacked, but it takes some time to get settled in." Or if metaphors aren't your thing, there's always the tried-and-true parable—think Aesop's fable about the tortoise and the hare—to get a concept across.



### about the author

**Liz Rosenau** is a Communication Strategist and the resident "word nerd" at T1ER1. She loves using stories to grab people's attention and teach them something new. Liz excels in copywriting, editing, storytelling, communication consulting and strategy, and change management. She's also a whiz at pop culture trivia.





# People Leadership

by Jeremy Goebel

## Empowering managers to lead people

Who sets the tone, vision, and culture of your organization? Leaders.

Strong leaders bring out the best in people. They're critical in activating strategy through people. From frontline managers to executives, leaders within your organization are impacting employees and being impacted by other leaders.

Leaders at all levels matter, and their growth is paramount.

Here's a common scenario. A high-performing individual contributor is promoted into a management position because they do great work. However, they haven't had the opportunity to develop how they lead people. As they continue to advance and lead more people, the impact of their habits

and beliefs is magnified (for better or worse). Their growth shouldn't be left to chance.

Managers are the link to engaging your frontline employees. To be successful, managers must become strong people leaders who inspire teams AND drive meaningful business results. They need the right mix of technical skills and business acumen to get work done.

But they also need emotional and social intelligence to motivate and involve employees in work.

Here are three key tenets pretty much every manager should model if they want to lead people:

1. Embrace development
2. Create meaning
3. Diffuse drama

### 1. Embrace Development

When managers are people leaders, they recognize that the opportunity for improvement is limitless—both for themselves and others. They actively seek growth opportunities and take time to reflect on their strengths and areas of development. They attend workshops, take assessments, meet with mentors, and seek feedback from others. By developing who they are as people, they better understand how they show up at work to lead their team.

They also embrace the continuous development of others. They strive to know the people on their team as individuals: What makes this employee tick? What are they currently seeking in their career? What areas can they develop to reach their full potential? What role can I, as the manager, play in their development?

The best managers encourage a growth mindset in their team. Not only do they model a growth mindset, but they recognize and reward employees who are continually finding opportunities to develop themselves and others.

**Consider:** Managers are busy, which means keeping all this stuff in mind can be overwhelming. Time-based communication and nudges can drive engagement and provide reminders to prioritize development. Systems for badging, social community, and certifications are also powerful for sustaining continual growth and development (and can add some friendly competition).



## 2. Create Meaning

Simply put, everybody has to know why they matter. It's what motivates many of us to get involved and participate in what we're being asked to do. When we know our hard work is valued, we work harder.

Managers are crucial for communicating how their employees fit into the bigger picture. It's important for any team to understand its value and collective role in driving desired business results. Effective people leaders articulate the value their team brings to the organization. They also inspire team members to stay in the game when the going gets tough.

It's especially critical for managers to create meaning during times of change. Managers are on the receiving end of a lot of input for change—senior leadership, the market, their team, the customer. How they receive and communicate that information to their team has a huge impact on employees' ability to succeed and thrive in the new normal at work.

**Consider:** Managers don't exist in a vacuum—their messages and actions are viewed within the context of the organization's broader story. We often ask managers to connect the dots from the work their team is doing to the company's mission, vision, and values. A compelling narrative can help managers recall key values or concepts more easily, making it easier for them to champion your organization's culture.

### about the author

**Jeremy Goebel** is a Principal Consultant at TiER1 who's passionate about developing leaders, transforming cultures, and overall unlocking people's potential. He enjoys crafting learning experiences that both engage and inspire participants, using empathy to create relevant solutions that provoke meaningful and lasting change. (And he's sure to bring lots of fun along the way!)



## 3. Diffuse Drama

Have you ever seen a manager put pressure or strain on a situation? Maybe they stoke fires through communication that comes off as accusatory and blaming. It isn't very productive and can even cause drama.

To diffuse tension and stress, managers must reframe the difficult situation as a challenge that can be overcome. People leaders engage others in meaningful conversations and interactions in three important ways:

- Asking the right questions
- Actively listening to others
- Respectfully challenging ideas to draw out better thinking

Facilitating quality conversations not only involves managers' communication skills. They also need to understand business financials in order to make good decisions. With the right "soft" and "hard" skills in place, managers can transform stressful situations into development opportunities for themselves and their team.

**Consider:** Some managers may struggle to diffuse drama through meaningful conversations. And changing mindsets and behaviors is hard work—being handed a checklist of policies to memorize won't adequately equip managers to have better conversations. Provide managers with a few guiding principles or behaviors to guide their day-to-day interactions and ensure that leaders at every level are creating an environment where healthy, frequent feedback is readily exchanged.

We all have to own our role in manager success. If we're going to ask managers to embrace development, create meaning, and diffuse drama, then we'll need to examine how the organization is equipping managers to hit that sweet spot of leading people AND driving business. It can take hard work, yet everyone at the organization will benefit when your managers can motivate, engage, and lead employees at work. **T1**



Digital transformation is capturing imaginations everywhere as it pushes the boundaries of human understanding. Yet technology alone doesn't extend the potential of our organizations. It also matters how people are using it.

No example better demonstrates this than the modern business meeting. Picture your typical virtual meeting: Are you realizing the potential of your digital future? I'm guessing not. Even if the technology system or platform is working as desired, too often we're multi-tasking—whether we're taking a call while driving to another appointment or answering messages between pauses in the conversation.

We think, "I'll get more done with the little time I have." But the impact is, "I'll slow down the thinking, make it harder for next steps and actions to be identified, and bring down the overall energy level."

Whether you see technology as a crutch or an accelerant, your intention in using technology really matters. When organizations are intentional in how they manage the technology ecosystem, and teams are intentional about cultivating the right digital behaviors, together they extend human potential and drive meaningful results. Realizing this potential requires visionary leaders to not only innovate how they recruit, develop, and lead their people, but also how they leverage people using technology to work together.

Want your organization to reach its fullest potential? Keep reading for ideas to get started, no matter where you are in the digital transformation journey.

CONTINUED



**Investigate**

Go on a digital field trip. Check out videos on YouTube and other platforms about the future of certain technologies—such as concept videos by designer Keiichi Matsuda for what it might look like to navigate cities through augmented reality.

**DEFINE ASPIRATIONS**

**Lead by example**

Consider which leadership skills, behaviors, and mindsets you can commit to changing to show peers and teammates what leadership in the digital future looks like at your organization. This includes acknowledging behaviors that might have led to success 10 or 20 years ago, but today either don't support digital initiatives or even hinder them.

**Identify goals**

Define the ideal digital behaviors and mindsets that are rooted in your culture. The nature of risk-taking, adoption of new technologies, and collaboration will shift in a digitally enabled team environment. For example, consider how to empower your team to flip a mindset from one that views uncertainty as a paralyzing force to one that sees uncertainty as a source of opportunity.



**DISCOVER POSSIBILITIES**

**Become aware**

Start to pay attention to the digital environments that your teams are working in. Identify your team's work habits when using digital solutions such as video conferencing or collaboration tools. Assess which habits are extending potential and which are holding the team back from engaging in the work.

**Explore**

Visit and immerse yourself in a digital lab space to see how digital solutions are being integrated into physical spaces and experiences. (One example is the Digital Capability Center, which showcased the future of manufacturing and supply chain in Chicago.)



**DESIGN EXPERIMENTS**

**Develop your people**

Build learning experiences that improve the digital literacy of your teams. UNESCO, the OECD, and many other government organizations and NGOs are investing to improve digital literacy in K-12 learners to prepare students for the digital future. Organizations similarly need to improve the digital literacy of their teams in order to capture the value in front of them.

**Launch a challenge**

India's Tata Group launches an annual "Dare to Try" challenge. In addition to celebrating product and process innovations, teams are encouraged to reach for an award that "recognizes and rewards the most novel, daring, and seriously attempted ideas that did not achieve the desired results."

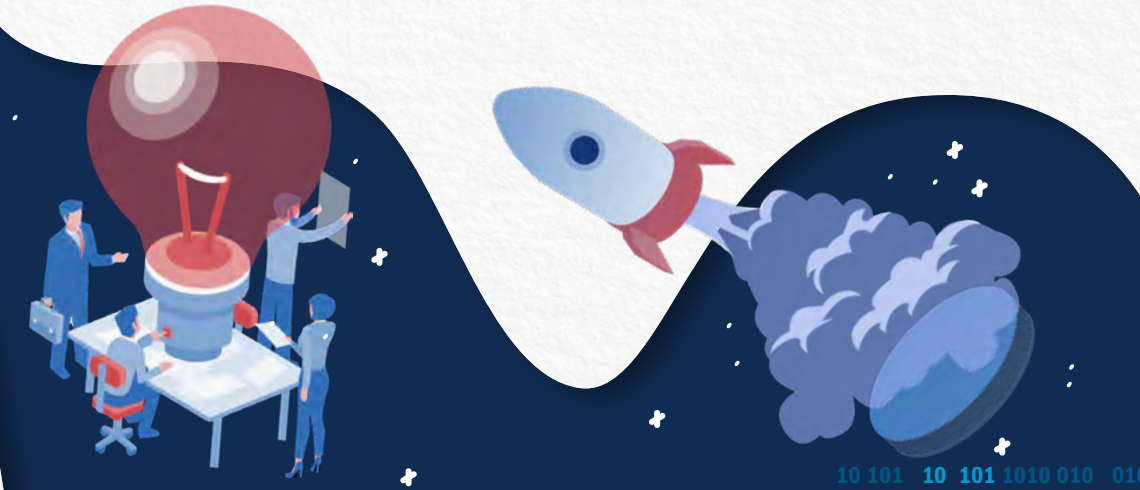
**Curate best thinking**

Gather diverse types of data and resources from different silos that can be leveraged as an asset. Think in small- and medium-scale ways how different data sources can be used as a predictive layer for decision-making, inform new product ideas, or tell a story about customer behaviors.

**Bring new perspectives**

Invite an external speaker to address a digital transformation topic for your organization. Experts within your industry as well as digital leaders in peer organizations across different industries can be good sources of this "outside-in" thinking.

Digital transformation promises a connected, mobile, and intuitive future that is extended by the imagination of the machines we work with through an increasingly digital layer. Yet progress in any organization comes with an inherent tension. The willingness to examine our digital behaviors and habits is what will unlock the truest potential of any organization. T1



**about the author**

**Nick Pineda** is a Director of Innovation based in Pittsburgh. He loves enabling teams and leaders to unlock their hidden potential to pursue bold visions for growth and transformation. Nick translates his passion, energy, and practical experience into innovative perspectives grounded in real-time, real-world impacts for clients. Fun fact: he's a former professional rugby player representing the Philippines against Hong Kong, Malaysia, and South Korea.



# MAKING CHANGE STICK

by Leia McKinnon



## about the author

**Leia McKinnon** is Director of Change Acceleration at Prologis. She is passionate about applying brain-based principles to behavior change and helping employees deliver business value through exceptional performance. Leia also loves being a role model for her two kids and showing them the value of hard work.

## TO KEEP PACE WITH ONGOING TRANSFORMATION

organizations need people to think, act, and work differently—and they need it done fast.

Yet at the heart of all this change are the employees; they're the one constant variable, and they're feeling the impact. They may feel overwhelmed, burned out, or fatigued. They're doing their best to meet expectations, but something is getting in their way. Even with good intentions, employees may struggle to accept and embody the organization's new normal.

That's because employees need your help to make change stick. They're being asked to be more resilient with change and to lean in to a new way of working with interest and inquiry. Take a step back and look at the bigger picture. Before asking them to make another change, take a second to fully understand all the factors at play:

- Do employees understand the company's vision or end goal?
- Do they believe in it? Do their bosses buy into it?
- Are they motivated to get there?
- Do they understand how the change enables the vision?
- Do employees feel frustrated or overwhelmed by the change?
- Do employees have access to required resources or systems?
- Are they supported in their role?
- Are they recognized and rewarded for their contribution?



### VISION PROBLEMS

Employees need to understand the company's vision—bonus points if they can frame it in their own words and share that purpose with others in the organization. Otherwise, it's hard to rally people around a unified, relatable idea.

Before you spread the word and ask for buy-in, make sure you're communicating something that's authentic, clear, and actionable for your people. It should inspire and energize employees around key actions, decisions, and priorities. Otherwise, people may resort to doing what's in their best interest.

Once everyone is aligned to the vision, reinforce it with key messages, engaging platforms, and learning experiences. This will help employees feel more resilient and capable in living out the strategic vision.



### NO SPONSORSHIP

An executive sponsor is a senior leader who leads by example in their words, actions, behaviors, and attitudes. For example, if your company wants to drive employee safety, the right sponsor might require compliance training, reinforce safety messages in company meetings, and encourage other leaders to demonstrate safe behaviors and attitudes.

The authentic support of a sponsor instills a sense of legitimacy and accountability among employees, strengthening your ability to gain buy-in and drive engagement. It's important that they talk the talk AND walk the walk. (A sponsor who advocates for safety but is seen texting while driving through the company parking lot isn't going to be very effective.)



### LACKLUSTER ENGAGEMENT

No one wants to feel like change is being done to them. Whether it's real or perceived, this lack of control can cause extreme discomfort for people. If we don't plan to support people through their discomfort, they will quickly become resistant to what's being asked of them.

Help employees own their part in moving the company forward into the new normal. Two-way communication channels can bubble up important questions and feedback. Be upfront about which aspects of the change are open for discussion and which ones are necessary for the organization.

We've also seen how leveraging a network of super-engaged employees not only inspires people to engage—it also leads to better insights and shared practices for the new normal of work.



### WRONG METRICS

When we measure the wrong things, we wind up driving the wrong behaviors. "Incentivizing" employees to report safety incidents each month might not lead to greater employee safety. What's to stop them from creating unsafe situations so that they have something to report and be rewarded for? (It happens.)

Measurement alone doesn't cause improvement. We need to define clear expectations for the desired outcomes as well as follow-up actions for when results don't align with expectations. When the right metrics are in place, we're better able to motivate people to adopt the behaviors and mindsets that will drive the changes we want to see.

To measure the right things, clearly define which behaviors you want to drive; how you'll measure behaviors in action; who will own that process; and how you'll support employees as they adopt new behaviors.

Not only will addressing these questions help you prevent employee fatigue, but it will also promote adoption of the change and make it "stick." As you ask these questions, consider the following common problem areas that may be impacting your people:

## LEADERS ARE INVESTING

considerable time and money to evolve their organizations. Yet, investment alone doesn't set your business up for success. You also have to take your people into account. When you understand how to support employees, customers, and other stakeholders throughout ongoing transformation, then ultimately people are empowered to make change stick and grow toward the future vision for your organization. **T1**



# WE ACTIVATE YOUR STRATEGIES THROUGH *people*

Strategy is only as valuable as the activation behind it: how it shows up, how work gets done, how your employees own it, and how your customers experience it.

## HOW WE *activate* STRATEGY



### Consult

Identify and align on performance factors needed for activation.

In addition to driving clarity around the desired future state, we partner to understand how the unique dynamics of your organization (culture, leadership, roles, systems, etc.) intersect and influence each other to create opportunities and overcome barriers for successful strategy activation.



### Design

Create the performance experience and everything needed to sustain it.

We deliver the plan and detail needed for your people to be empowered and aligned around your strategy: outlining key training, communication, performance support tools, technology, and associated timelines in a clearly articulated blueprint, journey map, or experience design.



### Build

Activate strategy through engaging, results-focused deliverables.

From custom technology to high-volume communication and training, our studio teams of instructional designers, software developers, designers, copywriters, and videographers create engaging deliverables that allow your people to have what they need when they need it—boom, strategy activated.

## CUSTOM SOLUTIONS THAT *activate* STRATEGY

Every organization has different strategic priorities—and therefore different needs. We custom-craft the solution that is right for you.

SYSTEMS IMPLEMENTATION · EXPERIENCE DESIGN · CHANGE STRATEGY & ADOPTION · ONBOARDING · SALES ENABLEMENT  
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FOCUSED ON *people* TO REALIZE *results*

Check out these common project results.

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for System Go-Lives

**OVER 90%**  
EMPLOYEE  
ENGAGEMENT  
in Training Programs

**80+**  
NET PROMOTER  
SCORE  
for Enterprise Events

Whether you're driving an entire organization toward adoption or empowering high-performing teams, we partner to get you from where you are to where you want to go. Just ask about the custom solutions we've built for our 300+ clients.

## AWARDS & RECOGNITION

**Gold: Excellence  
in Learning**  
Brandon Hall Awards  
2019

**Best Inclusion  
& Diversity Strategy**  
Brandon Hall Awards  
2017

**Fastest-Growing Private  
Companies in America**  
Inc. 5000  
2007 - 2019

**Best  
Workplaces**  
Inc. Magazine  
2017 - 2019

Founded in 2002, TIER1 is an employee-owned consulting firm and Certified B Corporation. Our 200+ consultants have deep expertise in learning, change, neuroscience, technology, communications, design, research, and project management. We believe that the potential for any organization lies within its people. By unleashing the best of both, we will change the world.



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# STRATEGY ACTIVATION THROUGH *people*



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