

GUIDANCE NOTE

Selling your workplace vision

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1. Introduction

The overall aim of this guidance note is to help you to communicate more confidently about workplace and its organisational value. It's about how to get people to listen to you by conveying the importance of workplace, and the opportunities it may offer, in a compelling and more engaging way.

The first Guidance Note in this series, 'Introduction to Workplace', explained what workplace is, how it relates to facilities management (FM) and what it means for you as a facilities manager. You can download it from www.iwfm.org.uk/better-workplaces.

Getting people to see the value of workplace is a constant challenge for workplace professionals, but particularly for facilities managers whose work is often, misunderstood or under-valued by the organisations they support.

This guidance note will provide you with ideas for how to communicate the value of workplace authoritatively and persuasively and create a convincing case for change. It will explain how you can use practical tools, such as storytelling, to help get senior leaders and other stakeholders to buy into your ideas.

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WORKPLACE AND WORKSPACE - A QUICK REFRESH

This is how we use the terms 'workplace' and 'workspace' in this guidance note:

- workplaces are the social places where people use the tools available to them to get their work done - a workplace contains and involves people
- workplaces can be fixed (for example hospitals and offices) or flexible (for example a work van or a temporary place of work)
- workspaces are the physical spaces or environments available for people to work in - spaces are empty and they become places when they have people in them

Remember that words can be defined in different ways. These aren't the only definitions of workplace and workspace, but they are the ones that we believe allow FM to make the best contribution to organisations.

2. The importance of gaining buy-in

It might seem odd to have the word ‘selling’ in the title of a FM guidance note. After all, selling and marketing aren’t things that come naturally to many facilities managers. However, we’re going to show you why thinking like a marketer is one of the ways that facilities managers can get people to understand and value workplace and FM.

Despite repeated calls, over many years, for FM to ‘be more strategic’ and to have ‘a seat at the boardroom table’, many facilities managers continue to lack influence and recognition for the work they do. A 2017 survey of FM professionals¹ found that:

- 69% of respondents felt that “people outside of FM don’t understand what I do”
- Only 54% agreed that “I feel that my work in FM is valued by others outside of FM.”
- 79% felt that FM needed to be more strategic
- 81% agreed that FM needed to be more customer focused

Taken together, these findings underline the fact that while FMs might be good at many things, promoting their value and capabilities are not always amongst their greatest strengths.

FM has always struggled to articulate its business value. As it’s developed into a multi-billion dollar operational service industry, FM has got stuck doing great, essential work, usually out of the earshot of senior decision makers. In an age where organisations are now dominated by a business value mindset, facilities managers all too often focus on technical reasoning and costs when trying to influence others.

This creates an inevitable consequence: without the ability to influence others it’s really hard to get people to buy into any changes you want to bring about or to get people to understand the value of your work more generally. It’s therefore essential to know how to convey the importance of your work in a compelling and engaging way.

Unless you’re running a dictatorship, any workplace or FM initiative – irrespective of how good or bad it is – requires one fundamental thing before it can happen: the ‘buy-in’ of key stakeholders. Buy-in may take a number of different forms, but ultimately it’s about getting peoples’ support and approval for what you’re intending to do.

In the area of workplace and FM, getting buy-in might need to happen long before any tangible change takes place and perhaps even before you’ve finalised a specific solution. This can be tricky, because how do you getting people to buy into an idea that’s not fully formed? Indeed, this is the stage where workplace and FM initiatives often fall by the wayside.

Footnote:

¹<https://www.iwfm.org.uk/resource/fm-and-the-future-world-of-work.html?parentId=9CBEDFOC-403C-4EEB-9D07335B2850FC35>

MAKING OURSELVES HEARD - A FM HISTORY LESSON

During the 1990s, Steelcase (one of the world's largest office furniture manufacturers) recognised the need for FMs to have more shrewd marketing skills. In 1992 they commissioned perhaps the most 'famous' of adverts about the role of FM, which took the form of three short videos.

Each video featured a suited American 'FMer' with a talent for juggling. In the first video he begins by struggling to define FM, a question he often... sometimes... okay, rarely gets asked: "FM has a very specific job description... it's just that nobody knows what it is. You see, an FMer ... has to be very familiar with management and facilities... as well as architecture, design, marketing ... it's knowing everything about everything, being everywhere every minute of every day... every time."

The FMer looks at the camera apologetically, like he knows it makes no sense. So instead he starts juggling, to bring the role to life. It's about cleaning (a plunger) and maintenance (a hammer); about lighting (a bulb) and security (a gun), forecasting (a crystal ball), navigating bureaucracy (red tape) and of course consumables (a loo roll).

In the second video the juggler is back, explaining that FM is all about embracing change to help a business achieve its corporate goals: "Are we merely asset managers or must we become strategic players, helping lead the way towards corporate change?" The question, asks the juggler, is "How do we new-age FMers make ourselves heard?" We have to become, he says, "a person who chooses to lead, who finds a way to be heard by the other executives. By the CEOs and the CFOs, and even the HRs!"

In the third and final instalment, the juggler recounts a close encounter with a CEO: "We were talking about space. Not the vastness of outer space... But the management of the workplace space". "I sometimes find it hard to find the words to express how articulate I really am" he says enigmatically, but by showing the CEO a model of people, technology, business and space, "the vision of the future now included space as a basic element of success".

The videos look dated and the jokes are pretty weak. But their messages are as relevant today as they were almost 30 years ago: FM is hard to describe; it's invaluable, but usually invisible; it's operational and strategic, given half a chance; it's what it needs to be - dependent on different business contexts; it unites the physical, technological and social elements of organisations through workplace; it's about leading change; and perhaps most shrewdly, it has to be in the business of persuasion to be at its most effective.

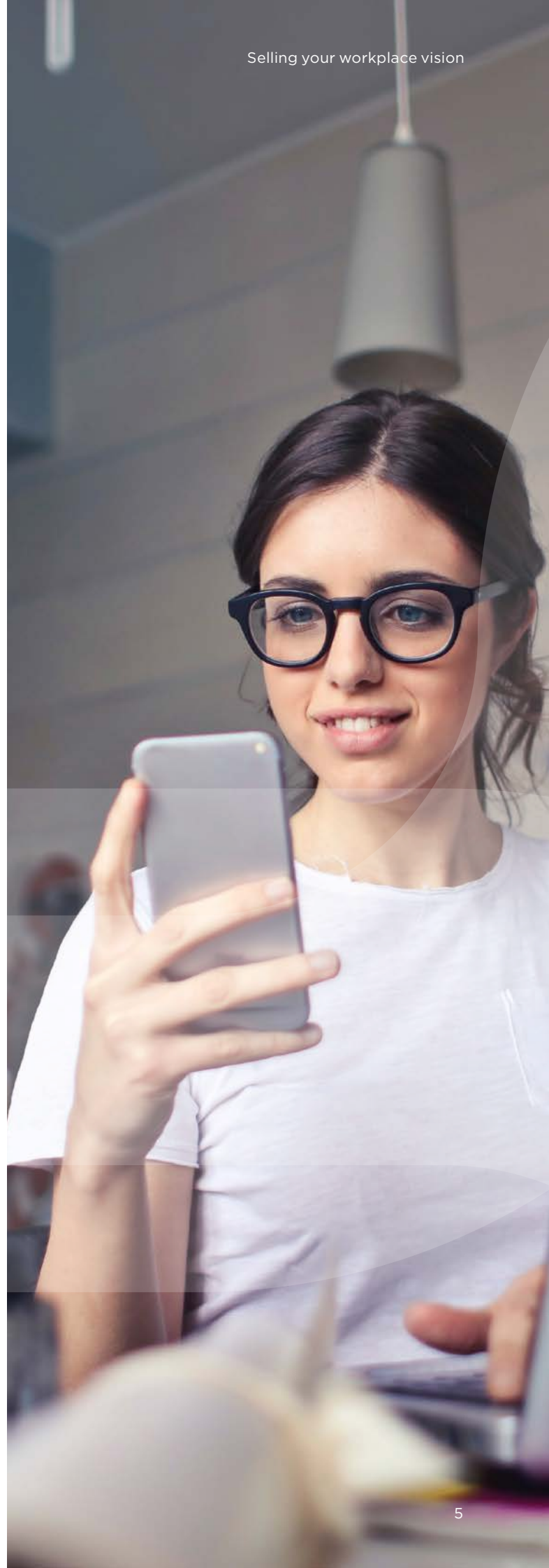
THE DIFFERENCE BETWEEN EVIDENCE AND EMOTION

To understand why getting buy can be difficult one needs to understand that people – and therefore organisations – aren't as rational, predictable or straightforward as we like to think they are. People might think they're rational, claim they behave accordingly and even find ways to justify their actions, but actually they're far from rational.

We can see all sorts of examples of this in our everyday lives. For instance, we often set out to eat more healthily, do more exercise or save more money for the future. But then we consistently fail to do so, despite overwhelming evidence that these things are worth doing and in our own best interest. Something clearly worth doing does not necessarily mean it will be done.

So why is this? Well, one reason is that people don't act on evidence alone – emotion also plays a key role in shaping how people act. People respond far more powerfully to emotional messages than we often realise. And what lies beneath this emotion, once you learn to spot it, is a compelling message enticing you to buy into whatever you are buying into.

A great example of this is how we respond to different commercial brands. For instance, we may pay a premium for a particular brand of mobile phone even though most smartphones all pretty much do the same things, by and large, and some cheaper brands actually provide better functionality. We'll then work very hard to justify the choices we make, to ourselves and others.



Kevin Roberts, CEO of global communications and advertising agency Saatchi & Saatchi, wrote a book on this phenomenon. In *Lovemarks*², he explains how certain brands have transcended utility value, to be adored in the eyes of their followers. This helps take their value way beyond mere utility, because of the symbolism, status and stories that have become associated with them. By decoding the approach and impact of brands like Apple, Ikea and Mini, Roberts concludes that emotional engagement can create 'loyalty beyond reason' in brands that have both high love and high respect. And it's far from a rational response.

So getting someone's buy-in is about more than just evidence. To get someone to buy into something you essentially need three things:

1. Compelling evidence (data)
2. A realistic plan for what needs to happen
3. An emotional response

These three things can be summarised in a simple equation:

$$\begin{aligned} &\text{compelling evidence} \\ &+ \text{realistic plan} \\ &+ \text{emotional response} \\ &= \text{buy-in} \end{aligned}$$

And that's where vision comes into play. If the compelling evidence is embodied in a business case and the realistic plan is your strategy, the vision is how you activate the emotional response.



ACTIVITY

Now think about your work as a FM or workplace professional:

- Where have you done a good job of getting someone to buy into a project or initiative?
- How did you get their buy-in?
- What was good about the way you went about it?
- Can you frame your approach in terms of evidence, plan and emotion?

Footnote:

²Roberts, K. (2005). *Lovemarks*. powerHouse Books.

WORKPLACE STRATEGY

A strategy is a long-term plan. Strategies usually involve bringing about some form of change but may also involve maintaining something in its current state or even leaving it alone. Strategising is often seen to be distinct from the day to day 'operational' activities of an organisation. Indeed, when organisations run into problems, it's sometimes due to a disconnect between these two activities.

It's worth noting that in facilities management 'strategic' has also become associated with higher level, more executive work and thinking. For instance, it's common to hear phrases such as "FM needs to be more strategic – we need to be in the boardroom" or somebody being described as "an incredible strategic thinker".

This alternative use of 'strategic' is probably because it's often the senior people in an organisation who are responsible for long-term thinking and decision-making. But this alternative use can also be problematic because it reinforces the view that strategising is the job of a select few, when in reality many of us are capable of doing it and it's vital to our long-term success. It's something that many of us do in our day-to-day lives.

A strategy usually articulates one or more goals. For instance, an organisation may state that it wants to become 'an employer of choice by attracting and retaining the best people'. It may then go on to explain how it will achieve this (e.g. by improving pay, benefits and working conditions) and how they will know when they've achieved it (e.g. because they have more people apply for jobs there and because they are in the 'Sunday Times 100 Best Companies' to work for).

The term 'workplace strategy' has become an increasingly common term, however different people use the term in different ways. For example, in FM workplace strategy is often used as shorthand for workspace or property strategy. This is understandable, because that's the area of workplace that FMs are often responsible for. But it can also lead to silo thinking and decisions about one area of workplace being made independently of other areas.

Workplace is comprised of culture, technology and workspace, so an effective workspace strategy needs to reflect this and be mindful of the overlaps and relationships between these different elements. We also know that workplaces are dynamic, so a workplace strategy needs to reflect this and avoid being an anchor to the past.



ACTIVITY

Now think for a moment:

- Does your organisation have a workplace strategy?
- If it does, what does the strategy include?
- What's missing from the strategy and why?

3. What is a workplace vision?

In its simplest terms, ‘vision’ is about imagining how something could be different in the future and then planning to bring it about³, through one’s own actions and/or through the actions of others. It’s about showing the art of the possible in a way that convinces others it’s worth doing and capturing the hearts and minds of the people whose buy-in you need.

When we say ‘workplace vision’, we don’t mean your organisation’s vision or mission statement. We’re referring to a vision for how your organisation’s workplace could be different. Your organisational vision and workplace vision should be linked, or something is probably amiss, but don’t confuse the two.

In a 2008 Harvard Business Review article⁴, the American academic Stewart Friedman suggested that a vision needed to:

1. Be **compelling** and engaging – it needs to capture peoples’ attention and make people want to be part of it.
2. Provide an **image** of the of future that’s easy to visualise and remember. You need to help people to envisage the future.
3. Be **achievable** – it should be a stretch, but not been seen as unrealistic, otherwise people will not think it’s worth bothering.
4. Be **future** orientated, but not so far distant that it seems to be out of reach.

You might want to use these four components as a checklist when creating your own vision or assessing the strength and credibility of someone else’s vision.

The ability to create and communicate a vision is important because it’s one of the first steps in bringing about successful change. Change is a topic that’s explored further in Guidance Note 5, but it’s worth considering briefly here. Don’t be under any illusions – when you begin sharing your evidence, plan and vision for how your workplace could be different, your organisation’s change journey has already started. Use this to your advantage.

Most people don’t like being changed – they don’t like change imposed upon them without good reason. When change is imposed on them they tend to either resist it or passively accept it but not really buy into it. In these situations it can be hard to make change stick. People tend to be more accepting of change when they:

- Have a choice or say in the change
- Can see the reason for the change
- Perceive the change to be valuable to them

It’s also worth pointing out that it’s going to be tougher to get people to buy into a vision without compelling delivery of the message. You may have a really valuable and robust vision, but if you can’t deliver the message in a convincing way you may struggle to get people to listen to and buy into it.

History is full of people who have been described as ‘visionary’, including prominent political and military figures, but also scientists and business people. Vision is a trait that’s become synonymous with ‘great’ leaders – people who have made a difference, for better or worse.

Footnote:

³<https://dictionary.cambridge.org/dictionary/english/vision>

⁴<https://hbr.org/2008/08/title>



ACTIVITY

Pause and think for a moment:

- Who comes to mind when you think of a 'visionary' leader?
- What was it that made them visionary?
- What lessons can you take from this and apply in your own work?

One of the most frequently cited contemporary examples of a visionary leader is the late Steve Jobs, the former boss of Apple. His vision (and drive) is widely acknowledged as a foundational element for Apple's rise to become one of the world's most successful companies.

So, what was it about Steve Jobs that made people see him as visionary?

- His **higher purpose was easy to understand**, impressive and sticky – “We’re here to put a dent in the universe. Otherwise why else even be here?”
- His **energy and desire to push boundaries** appeared relentless and his expectations of others were accordingly high.
- He **created a tribal narrative** both within Apple and its customer base – us versus everyone else – creating a home for mavericks, outsiders, underdogs and rebels. “I’d rather be a pirate, than join the navy” made it way cooler to be in the Apple gang.
- His **presentation style** embraced the four elements described earlier by Stewart Friedman. On stage, Jobs took people on a carefully choreographed journey that **conveyed the art of the possible** in a way that delighted the audience.

While the strong association between vision and ‘great’ leaders is understandable, it also means that vision has come to be seen as something that’s the preserve of the select few. In ‘Living Leadership, a practical guide for ordinary heroes’⁵, the authors caution against the risks and dangers of viewing leadership this way, decrying “to hell with great men”.

Their point is that we can all choose to lead – leadership is a state of mind, not a position on an organisational chart. We’re most effective when we bring ourselves to leading: our character (not charisma), moral strength and ethical values are the most important virtues that help us connect with people. It’s worth bearing this in mind when creating your own vision – think about what you stand for and what you can offer. Holding the mirror up and reflecting honestly like this can help you recognise where your own ‘voice’ can help elicit the emotional response you require.

Footnote:

⁵Binney, G. et al. (2005). Living leadership. Harlow, England: Pearson Education.

PRACTICAL TECHNIQUES FOR UNDERSTANDING PROBLEMS

A key step in creating a compelling vision is understanding and framing the problem that your vision will address. Getting this step right is really important because otherwise there's a risk that you'll come up with a solution to the wrong problem – and you'll then struggle to get people to buy into it, because they won't see the value in what you're proposing.

Product designers and marketers know this all too well. History is littered with examples of consumer products that have failed because they provided a solution to a problem that didn't really exist or that didn't matter enough for consumers to part with their money, such as billionaire James Dyson's first invention: a garden wheelbarrow with a ball instead of a front wheel.

There are a number of practical techniques that you can use to better understand problems. Some of these techniques encourage you to step into the shoes of the people to whom you're trying to sell your vision – in order to understand their perspectives and (critically) their pain points: the things that are making their life harder than it needs to be.

One technique is called 'a day in the life' or user journey mapping. There are various ways to approach this, but it's best achieved by talking with members of your target audience to understand their experiences. You need to build empathy with your target audience and see the world from their perspective, otherwise you'll make (possibly incorrect) assumptions about their problems.

For instance, you may run a workshop with your service users and ask them to talk you through a typical working day. In your role as facilitator, you'd ask them to talk about what they do, when and why, and explore the problems they experience when doing these things. This is an exercise all about listening carefully, not seeking to impose your own opinions and explanations.

Another way of understanding a problem is by brainstorming "wouldn't it be great if...?". This technique is useful in situations where there's evidence that people 'don't know what they don't know' and where you want to encourage them to think about the art of the possible. Brainstorming such as this works well by getting small groups talking together so they feel safe to discuss ideas. You may need to provide some examples and coach the groups gently to get them started.

Understanding problems also often involves digging deeper, because the issue that you may initially think is the problem that needs solving may actually be a symptom of another (less obvious) issue – what we might describe as the 'root cause'. For example, with the 'five whys' technique you:

1. Start with a problem (e.g. x isn't working)
2. Explore the cause(s) of the problem by asking 'why' (e.g. why isn't x working?)
3. Explore the cause(s) of the cause(s) (e.g. why is y broken?), until you find the root cause.

In this example you may eventually find that the root cause of x not working is that the organisation is trying to cut costs and that x is not seen to be important enough to warrant proper attention.

4. Creating a compelling workplace vision

In FM it's common for people to talk about matching supply and demand. For example, we try to determine what an organisation needs from its workspace and come up with solutions that will meet these needs. The organisation will then choose the workspace solution that best meets its needs and maximises the benefits to the organisation.

But will it? This approach might seem very intuitive, but it also assumes that organisations make rational decisions based on the information available to them. However, the reality is that organisations are made up of people, and people (including senior leadership teams) often don't make rational decisions.

Marketeers have long recognised the fact that people do not always behave rationally and have looked to use this to their advantage when selling products and services. One way they do this is by tapping into peoples' emotional needs by clearly explaining why a product solves their problems and/or improves their situation. This is called a value proposition.

A value proposition describes the specific benefits that customers can expect from a product or service⁶ – it's not an exhaustive explanation of the details what the product or service is. Value propositions are about 'why' something is a great, rather the 'what' that it entails. They also explain why the product or service is better than an alternative.

For instance, Slack – the instant messaging and collaboration platform – previously had a value proposition that promised prospective users that they would “be more productive at work with less effort.” Slack is currently positioning itself as the “the smart alternative to email”, because its use of channels (it claims) allows users to “focus” on different workstreams and avoid “a single overstuffed inbox.”

Thinking in terms of value propositions can seem alien to some people, particularly facilities managers who have been forced to spend their careers justifying decisions in terms of costs, rather than value. However, that's the very reason why value propositions can be useful for FMs – they help to shift the conversation away from a preoccupation with cost.

For instance, take the following ten-second pitch about the benefits of a better workplace, taken from Neil Usher's book, *The Elemental Workplace*⁷:

“Think what an amazing workplace could do for the business. We'll attract, keep and develop the most energized, motivated people, freely able to be their best, wanting to work in a place that reflects our dynamic, caring and responsible brand, proudly and openly sharing this enthusiasm, while we save up to a third of what we're spending on property that doesn't work for us to allow us to invest in an environment that does”

This pitch doesn't shy away from commercial realities. But the emphasis is on why workplace can add value to the organisation, not how it will be achieved technically or practically.

Footnote:

⁶Osterwalder, A., Pigneur, Y., Bernarda, G., & Smith, A. (2014). Value proposition design: How to create products and services customers want. John Wiley & Sons.

⁷Usher, N. (2018) *The Elemental Workplace*. LID Publishing



ACTIVITY

Now consider your own organisation:

- Can you create a similar pitch that conveys what an amazing workplace could do for it?
- The pitch should be a value proposition that:
 - is clear and easy to understand by non-workplace people (beyond FM!)
 - conveys the benefits the organisation can expect to receive
 - explains (or implies) how it is different and better from what your organisation currently has
 - can be read and understood in under 10 seconds
- Don't be disheartened - this is really difficult, particularly if you're not used to thinking this way. Some of the shortest and most memorable value propositions will have taken huge time and effort to develop and refine.

EXAMPLES OF GREAT VALUE PROPOSITIONS

There are examples of great value propositions all around us. Here we've chosen some renowned products and services and placed the technical descriptions of their features alongside their value propositions – which in many cases are captured in a pithy strapline. This approach highlights just how different value proposition narratives are to feature-based ones.

Technical description	Value proposition/straplines
<p>Uber is an app-based taxi service operating globally in major cities. It uses proprietary algorithms to match smartphone-using passengers to smartphone-using drivers in their local area so that journeys can be arranged automatically, and payments can happen conveniently using cloud-based payment technologies and navigation systems. Passengers and drivers rate each other to create a mutually respectful and safe travel culture.</p>	<p>Offering uber convenience, Uber is the smartest way to get around. One tap and the car comes directly to you. Your driver knows exactly where to go. And payment is completely cashless.</p> <p>“Tap the app. Get a ride.”</p>
<p>Amazon is a global e-commerce business. It uses proprietary technology and algorithms to offer customers access to a wide range of physical and digital products, sold both directly and through a network of third-party sellers. It controls its e-commerce business and supply chain from end to end by developing online sales platforms for its physical and digital products, coupled with warehousing and logistics technologies.</p>	<p>Amazon aims “to be Earth’s most customer-centric company, where customers can find and discover anything they might want to buy online and endeavours to offer its customers the lowest possible prices.” For many people, it is simply ‘the everything store’.</p> <p>Amazon Prime: “Anything you want, quickly delivered.”</p> <p>Kindle: “Easy to read on the go.”</p> <p>Amazon Marketplace: “Sell better, sell more.”</p>
<p>The original Apple iPod was a portable sound file storage and listening device in which music could be stored conveniently and accessed through a button-driven menu system. It used a miniature hard disc powered by a rechargeable battery, and a microprocessor to read and play a range of file formats. The original iPod could store around 100 average length music albums. Content was managed by linking the device to a personal computer using proprietary software. You listened via a 3.5mm headphone ‘line-out’ socket.</p>	<p>An ultra-slim hard-drive that doubles as a file and application storage disk. A blazingly fast connection capable of downloading a CD in ten seconds. A rechargeable battery that provides up to ten hours of continuous playtime. Headphones engineered for high-fidelity sound.</p> <p>“A thousand songs in your pocket.”</p>
<p>Airbnb is an app-based temporary accommodation database operating worldwide. Using an accessible and user-friendly interface, it enables travellers to find people who have made some or all of their accommodation available to rent. This means that Airbnb can become the world’s largest accommodation provider without owning any property. Using their multi-device online platform, payments can happen seamlessly using cloud-based technologies. Guests and hosts rate each other to create a mutually respectful and safe global travel culture.</p>	<p>Airbnb is a community-based online platform for listing and renting peoples’ homes. It connects hosts and travellers and facilitates the process of renting without owning any rooms itself. Airbnb cultivates a sharing-economy by allowing property owners to rent their accommodation to other people.</p> <p>“Don’t go there. Live there.”</p>

UNDERSTANDING WHAT MATTERS TO PEOPLE

When it comes to developing a compelling vision for workplace, it's important to understand what really matters to the people you're trying to influence. In many cases, the people you're trying to influence are senior leaders (as they tend to be key decision-makers) so it's important to engage with them to understand what their priorities are and whether there are any tensions between them.

A useful way to do this is to ask them to rank a series of factors. We tend to use the nine factors listed in *Planning Office Spaces*⁸, which are: enhancing productivity; reducing costs; increasing flexibility; encouraging interaction; supporting cultural change; stimulating creativity; attracting and retaining staff; expressing the brand; and reducing environmental impact.

It's important to stress that these factors aren't mutually exclusive – they can all be important to an organisation, but the aim is to identify which ones are more important than others – and the reasons why. An exercise like this can help you to understand whether there's a consensus amongst decision-makers and the ways in which changes to workplace can help enable their strategic goals.

Such exercises can also highlight potential contradictions in the way decision-makers are thinking. For instance, if a business strategy talks about cost reduction being a priority, but your conversations with them suggest that cost reduction is low on their agenda (or maybe they actually mean cost neutral) it's important to draw their attention to this potential contradiction and find out what's really going on.

Focusing on strategic factors is useful because it helps to steer conversations away from solutions – whether they be IT, workspace or HR solutions. It's very easy for senior leaders to become wedded to 'on-trend' workspace industry solutions that might not deliver the outcomes they are looking for. One only needs to think about the current obsession with 'agile working' and 'activity-based working.'

Focusing on strategic priorities also means that the conversation focuses on organisational needs rather than the personal preferences of one or two senior leaders. After all, just because the chief executive has a personal preference for a particular style of workspace, that doesn't mean it's the right solution for the wider organisation.

Creating a compelling workplace vision can also be helped by developing a better understanding of how people in an organisation work, how they might need to work differently in the future and whether the workplace is an enabler or hindrance to this. This will provide you with clues about pain points that could be remedied through your vision.

However, it's important to avoid the trap of assuming you know this already. FMs often have strong relationships and their 'ear to the ground' in the organisations they support. But they can also have gaps in their knowledge about what people in the organisation actually do and what they need to work effectively. These gaps in knowledge can only be filled by getting out there, talking to people and seeking to understand how they experience things.

Footnote:

⁸Meel, J. van. (2010). *Planning office spaces*. London, U.K: Laurence King Publishing.

UNDERSTANDING YOUR AUDIENCE

Another important part of creating is a compelling vision is understanding your audience – the people you’re trying to sell your vision to. If you don’t understand what matters (or does not matter) to your audience there’s a risk that your message will be ignored or misunderstood. Members of your audience may even turn against your vision and undermine it.

When creating a vision it can be helpful to ask yourself the following questions:

1. What’s important to your audience?
2. How does your audience respond to information?
3. What influences the decisions they make?
4. What’s their readiness for change – how ‘ready’ are they to buy into your vision?

Coming up with answers to these questions should encourage you to see the world from your audience’s perspective.

It’s particularly important to ask these questions about the people who will be deciding on whether or not to implement your vision – in many cases these people will be senior leaders or executives in your organisation or your client’s organisation. Sometimes these decision-makers may hold views that conflict with each other in one or more ways. For instance,

- The **chief executive** may prioritise cultural transformation, innovation and staying ahead of the competition
- The **chief operating officer** may be charged with achieving business and operational efficiency and effectiveness improvements
- The **director of finance** may be focused on managing profit and loss, sustaining cashflow and achieving budget requirements
- The **HR director** may prioritise attracting and retaining talent and improving employee wellbeing
- The **IT director** may be preoccupied with balancing data security risks with providing employees with new collaboration tools



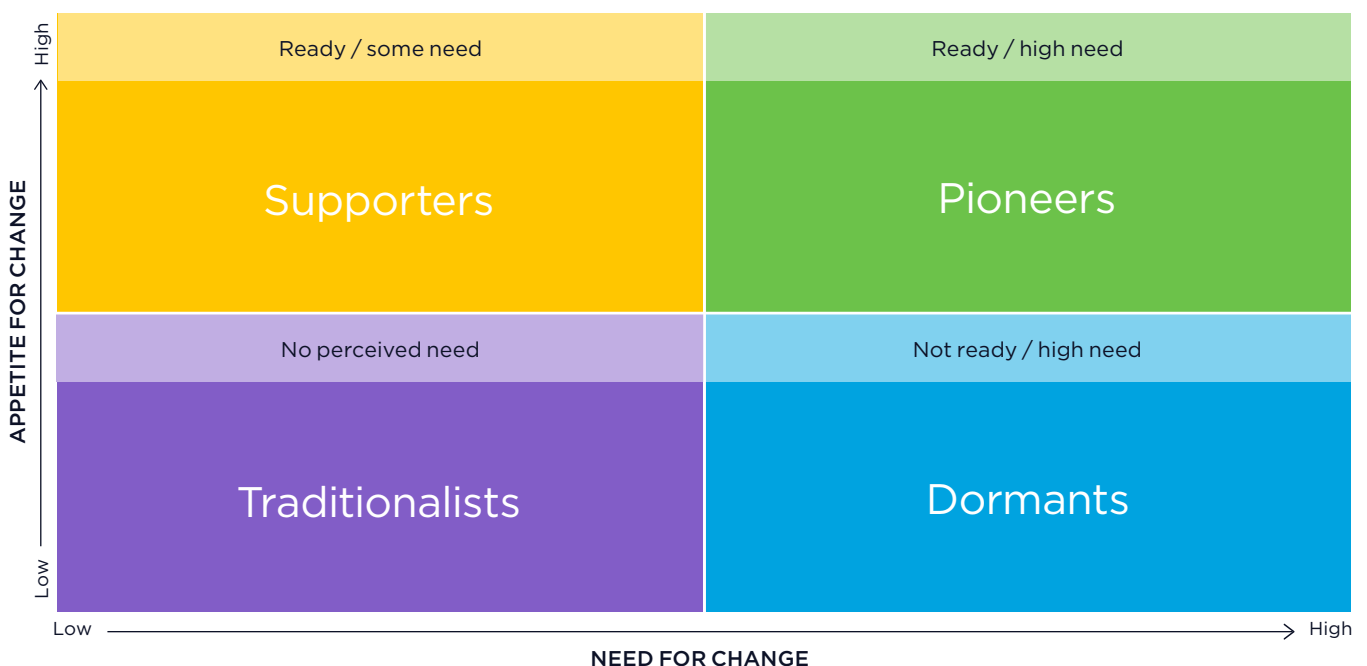


Your vision may need to address these diverse interests, but it's not difficult to see how some of these issues may come into conflict with each other. Navigating these conflicts can sometimes be tricky, but it's critical that you're aware of them.

When it comes to gauging readiness for change, it can be useful to think about both peoples' need for change and their appetite for change. These are likely to be different for different members of your audience. One way of making sense of this is to position people, or groups of people (e.g. teams) on this two-by-two matrix, reflecting their appetite and need for change.

Visually positioning people or groups of people in this way can be useful because it will allow you to identify:

- **Traditionalists** – people who do not see the need for change and/or do not want it to happen. Traditionalists are not a problem per se, but traditionalists who actively seek to undermine your vision could be – so you need to know who they are.
- **Dormants** – people who would benefit from change but don't realise it. Your goal should be to raise their awareness of what benefits the change would bring for them, so that they want the change to come about. These people may then move towards becoming pioneers.
- **Supporters** – people who don't necessarily need the change to happen but can see the bigger picture and how the change can benefit the organisation as a whole. They'll support change that doesn't inconvenience them.
- **Pioneers** – people who want the change to happen because it will benefit them in some way. Pioneers can be advocates of your vision. Having some decision-makers (e.g. senior leaders) in this category is pretty much essential to help your vision become reality.





ACTIVITY

Now think about a workplace change that you've been involved, are currently involved with or will be involved with in the future.

1. Then write down a list of people (or groups of people) involved in or affected by the change
2. Plot each person (or group) on the above matrix, based on how you perceive their:
 - a. need for change (the degree to which they will benefit from it)
 - b. appetite for change (the degree to which they want the change to happen)
3. It might be useful to ask a colleague to do the same thing independently of you and what you've come up with. This is a great way of identifying any blind spots or gaps in your knowledge.
4. Think about what you could do (or could have done) to help nudge any 'traditionalists' or 'dormants' towards becoming supporters or pioneers

5. Communicating your workplace vision

Once you've created your vision and considered the needs and perspectives of your stakeholders, you'll need to bring your vision to life by communicating it to the people who need to know about it. Great communication is the key to success in most aspects of business. Workplace change is no different in this regard.

In this context, great communication is about emotionally activating your audience so that they buy into your vision. You might do this through presentations but also through side conversations that you find yourself involved in. Like most things, communicating well takes practice but it's a really important skill to develop.

When we talk about communicating well, we mean:

1. Structuring a compelling narrative
2. And then delivering that narrative in a compelling way

Narrative is another word for a spoken or written account of events – a story, in other words. Long before we were literate, we evolved as social creatures who learnt to convey complex information and meaning through the stories we told each other. This hasn't really changed, despite all the trappings of modernity, and all those policies and processes we implement to try to help our organisations function.



THE POWER OF STORYTELLING

In 2010 Nancy Duarte, CEO of Duarte, Inc. and – in her own words – responsible for some of the most important presentations in the world since 1988, delivered a talk exploring the secret structure of great talks. It's well worth a watch⁹.

Duarte showed – using research evidence – how many famous speeches adhere to a format known as 'the hero's journey'. You may well have heard about this narrative structure before and if you've ever wondered why so many movies follow similar trajectories, it's because they actually do!

Harry Potter, Star Wars, The Matrix, The Lion King and The Lord of the Rings, amongst many others, have all been shown to fit the structure of the hero's journey. Pixar, the animation studio now owned by Disney, became masters of its use in shaping many of their animated adventures. Their success is in large part due to the enduring cultural appeal of the 'narrative arc' the hero's journey follows.

The hero's journey has been studied over many years and different versions have more or fewer stages. Duarte references the simplest version, in which the following stages form the basis of the narrative arc (or shape) of the story:

1. A **hero** with a desire (the beginning)
2. A **roadblock** (the challenging middle)
3. An emergent, successful **resolution** (the happy ending)

The hero's journey is a great way to structure a story, but it's important to recognise who the hero actually is in your story. Perhaps surprisingly, you are not the hero. It might feel like it, stood there in the fanciest meeting room in the building, with a group of senior leaders expectantly sat there waiting for you to impress them.

But instead, you need to cast your audience – in this case the senior leaders in the fanciest meeting room in the building – as the heroes in the adventure you are about to take them on. Which means your role is as their mentor – Yoda to their Skywalker, Morpheus to their Neo or even Mary Poppins to their Banks children!

So what do good mentors do? They coach, rather than tell. They support and encourage. They stop short of solving the problem – even if to them it is quite clear – because they know that to truly embrace and own a change, the hero has to come to their own understanding. Good mentors show the art of the possible and they marvel at what could be if the problem was removed.

Footnote:

⁹https://www.ted.com/talks/nancy_duarte_the_secret_structure_of_great_talks/transcript?language=en

PRESENTING WITH PURPOSE

Duarte was puzzled by the fact that whilst we're regularly captivated by stories, we're also regularly bored witless during presentations – even presentations about really important topics. Why is this and what can we do about it?

She pointed to the emotional value of a story – it's ability to engage our senses, move us to feel and act, and ultimately to bring us together. Whilst hard data and facts are absolutely necessary, she argues that “how insights are communicated could reverse or improve the trajectory of data”.

The rise of TED over the past two decades (a non-profit event and online knowledge enterprise which stands for Technology, Entertainment, Design) is testament to the power of well-crafted presentations. We'd be surprised if you've not watched at least one TED talk at some point in the past.

With a global network of affiliated events and billions of online views it's hard to contest the impact TED talks have made – both in spreading powerful ideas and also raising expectations of what a short, well-crafted presentation can achieve. There's even a sub-genre of online materials and books available about presenting powerfully the TED way!¹⁰

It's easy to fall into the trap of thinking that you need to be an extrovert to deliver a great presentation – or else that you need to channel some sort of inner performance that you're not even sure you have. Remember, there are more introverts in the world than extroverts, including plenty of people on leadership teams. Presenting well is a craft worth the practice and effort.

USING PERSONAS

A persona is a fictional character that embodies the needs of a particular group of people. Creating personas can be a great way of summarising and bringing to life peoples' needs in an easy to understand and more people-focused way. They can also highlight overlaps and differences between the needs of different groups, which may help you to tailor your offer accordingly.

For instance, you may want to cater for the needs of different types of workers in the workplaces you manage. Let's say that your research reveals three types of workers, each with different working patterns and workplace requirements. Knowing this not only allows you to optimise your workplace provision by providing each group with the workspaces and technology required to do their jobs efficiently and effectively. It also allows you to bring your vision to life in a people-centred way.

Footnote:

¹⁰ https://www.ted.com/playlists/574/how_to_make_a_great_presentation - recommended_resources?

Persona	Type of work	Work style	Key requirements
Ali – the mobile worker	Coming up with ideas for new products Meeting with and presenting to clients and customers	Most of time spent working in different locations – in different offices, at home, in ‘third spaces’ and at clients’ offices.	Somewhere to seamlessly ‘touch down’ and work when at one of our offices Somewhere to undertake creative workshops with colleagues Lightweight tablet and mobile phone with long battery life
Sam – the semi-mobile worker	Managing new product development projects Liaising with colleagues in different offices	Most of time spent working at our head office, in meetings and on conference calls Also visits our other offices to meet with colleagues	Somewhere for project teams to come together for a short period of time Somewhere to undertake conference or video-conference calls Laptop and mobile phone with generous sized screens
Jo – the fixed worker	Doing administrative work that requires concentration In meetings with colleagues in our head office	Most of the time spent working at our head office Could work on many tasks at a regional office closer to home	Somewhere to concentrate and focus Somewhere to hold meetings with 2-3 colleagues, at short notice A powerful computer with two generously sized screens

Personas are particularly relevant to FM and workplace because they underline the importance of avoiding a one-size fits all approach to meeting users’ needs. Adopting a one-size fits all approach risks alienating certain groups because they’ll think you’re overlooking some or all of their needs and undervaluing their roles. Worse still, you may provide a solution that satisfies nobody’s needs!

Personas can also be useful during times of change, because they can help you to understand what matters to different groups of people. This knowledge can help you to tailor your message when proposing or making a case for change. For instance, if you know that a particular group values x, then you can make sure that x is embodied in your proposal.

Developing personas involves undertaking research to understand peoples’ needs and priorities. Personas need to be grounded in evidence, otherwise there’s a risk of making (possibly incorrect) assumptions about what people do and need. Your research you undertake may take a number of different forms, but will typically involve interviews, surveys or workshops.

Now pause and think about your own work situation:

- Do you use personas?
- If you do in what ways do the personas help you to do your job?
- If you don’t, how might you use personas to improve the service(s) you provide?

6. What should I do next?

Now that you've read this guidance note we recommend that you:

- 1** Give this guidance note to colleagues who you think might be interested in it. And then make sure to have a follow-up conversation about it with them and what it means for the way you approach workplace change.
- 2** Complete the skills and knowledge self-assessment. This will give you a high-level indication of where you might need to focus your learning and development, in order to become better at selling your workplace vision.
- 3** Explore some of the resources that we've provided links to throughout this guidance note. These are a great starting point for learning more about this topic and for developing your confidence at getting other people to buy into your ideas.

LEARNING MORE ABOUT THIS TOPIC

We have partnered with workplace specialists 3edges to provide a one-day CPD course on 'Selling your Workplace Vision' as part of our 'Workplace Leadership Programme'. The course can be attended individually or delivered for groups 'in-company'.

Multi-course discounts are available. To find out more about our courses or to book a place, visit <https://www.iwfm.org.uk/professional-development/academy>

The ideas and approaches in this guidance note also form part of our 'Workplace Diploma in Leadership, Insight and Change'. This is the first workplace qualification of its kind. If you would like to learn more about the Diploma, including individual and in-company options, contact qualifications@iwfm.org.uk

SKILLS AND KNOWLEDGE SELF-ASSESSMENT

This thinking tool has been designed to help you reflect on your own skills and knowledge. It will help you to identify things that you do well or less well and identify areas for improvement.

As with any health check, this tool requires you to reflect on your own situation critically and honestly. Remember, sometimes honest truths can be uncomfortable!

You might find it helpful to complete this health check individually within your team and then come together to discuss your responses.

Skills

- 1 Communicating your thoughts and ideas clearly in writing
- 2 Using narrative tools to create emotional engagement with your ideas
- 3 Introducing new ideas into your organisation
- 4 Making the effort to understand other peoples' needs or problems
- 5 Being comfortable when other people critique your ideas
- 6 Coming up with creative solutions to peoples' problems
- 7 Engaging with colleagues at different levels in your organisation
- 8 Presenting your ideas to others face-to-face in a compelling way

Knowledge

- 9 How decisions are made in your organisation
- 10 The key issues face different senior leaders in your organisation
- 11 The readiness of key stakeholders for workplace change in your organisation
- 12 The preferred formats for written and presented information in your organisation

Once you've put a mark on each scale, draw a line down through the marks so that you can see the profile of your responses.

To complete the health check, read each statement and pick a point on the corresponding scale that feels about right for you. Try not to overthink the statements!

Let's take statement 1 as an example. If you think you're not very good at communicating your thoughts and ideas in writing, you might pick a point somewhere to the left hand-side of the scale.

I'm not very good at this I'm excellent at this

12 horizontal scales for self-assessment, each with a pink dot on the left and a teal dot on the right.

Then take stock of the overall picture and ask yourself:

- what are my strengths and weaknesses?
- are there any obvious areas for improvement?
- who do I need to talk to about developing my skills and knowledge?

The Institute of Workplace and Facilities Management (IWFM) is the body for workplace and facilities professionals.

We exist to promote excellence among a worldwide community of over 17,000 and to demonstrate the value and contribution of workplace and facilities management more widely.

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The IWFM was established in 2018. It builds on the proud heritage of 25 years as the British Institute of Facilities Management.

To find out more, please visit
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About Ricoh

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