



Take on Board

Transcript – Repa Patel

Helga Svendsen 0:00

Today on the Take On Board Podcast, I'm speaking to Repa Patel about board leadership through disruption, and using appreciative inquiry to engage the hearts and minds. First, let's hear about Repa. Repa, I'm going to get you to introduce yourself to the take on board community in a moment. But firstly, I'm just going to share how you when I first met, so eight years ago, I think it is back in 2013, when the Take On Board Podcast and everything about it was just not even a twinkle in the eye. Repa was my career coach. So at that time, I had recently been made redundant, essentially. So the organisation I'd been the CEO of had merged with another organisation, there was two CEOs, I was the CEO of the smaller organisation, we all know how that story ends. So I exited stage left, and as part of my exit stage left, there was some career transition support. And lucky me, Repa was my coach. And kind of supported me through that process, and helped me find this new path. So yay, big welcome to you the Take On Board Podcast today. And thank you for helping me find this new path.

Repa Patel 1:12

Oh my absolute pleasure. And it's been I was thinking about that, you know, eight years, I couldn't believe it. Uh huh. We share so much in common, of course, and, you know, one of them is that we are, can I say recovering lawyers

Helga Svendsen 1:26

You can definitely say recovering lawyers.

Repa Patel 1:29

And the fact that we've switched paths, you know, into, into what we do now, which is, you know, wonderful from around leadership.

Helga Svendsen 1:35

Absolutely. And whilst you're my coach, then, and it was a professional relationship, I knew at the time, it's like, oh, she's good person, keep her in the back pocket. So here we are eight years later. And I've obviously kept in touch during that time. So yeah, it is fabulous to have you here today.

Repa Patel 1:52

My absolute pleasure. And I love catching up with you. So this just feels like a catch up.

Helga Svendsen 1:57

We literally have a cup of tea in front of us, folks, which is also wonderful to have. So Reba, can you introduce yourself to the take on board community?

Repa Patel 2:05

Thank you for that. Yes, Repa Patel from c mindfully. My expertise is essentially mindful leadership. I work at the intersection of neuroscience, positive psychology and mindfulness. So what all of that means is I deliver personally transformative strategies that are proven to work. You know how, in a board, you can have a highly functional team. So people who are really good at what they do, and yet still have less productivity, profitability and engagement in the organisation. And within the board. What I do is to engage the hearts and minds of that team, so that they can lead the organisation through growth and disruption. And it's really about igniting the hearts and mind. My background that I've just alluded to is legals, and my last legal role was head of legal for the institutional bank and ANZ. And that was way more than 10 years ago. And then after that, I moved into a strategy role. So head of strategy for the international trade finance business, which I left 10 years ago to start up my own business and work with leaders and their teams and board chairs and boards. And of course, you're the former chair and still a board member at the Multicultural Center for women's health. That's correct.

Helga Svendsen 3:26

And formally, I didn't know this until we were doing the preparation for this that you were formerly the company secretary at the State Library of Victoria.

Repa Patel 3:33

That's correct. Yes, many, many moons ago.

Helga Svendsen 3:37

All governance, wisdom.

Repa Patel 3:39

Yes, absolutely. And a different governance role reporting to the chair, and all the kind of intricacies that that involves of reporting to the chair but day to day reporting into the CEO.

Helga Svendsen 3:51

Yes it's a tricky role being company secretary, actually did a podcast with Robyn Weatherly, which incorporated some of that conversation some time ago. So Repa before we talk about board leadership, and disruption, and all of those wonderful things, let's do a little bit deeper about you. So can you tell me about your upbringing and what lessons you learned what you've got up to, and what were the leading influences on you as you were growing up

Repa Patel 4:17

So my background is refugee actually, so I was a refugee in with my parents in the UK, and grew up in the late 70s, early 80s in London, and then became a lawyer in London. So you know, practiced, qualified and practiced there moved to Australia, so halfway around the world about 25 years ago with my husband, and have transitioned careers a number of times, even within my legal career. So I've done the private practice work Inhouse Counsel, working for the state government in this in the State Library role that you described in the governance type role. So I You can say that change has been a constant in my life. So the ability to adapt has been constant. And I look at life through the lens, the lens of diversity. And I don't mean just ethnic diversity, I mean, diversity of thinking. So clients engage me because of the diversity of thinking that I bring. So I think adaptability, resilience, all of those things were basically part of, or are part of who I am because of the life journey that I've taken.

Helga Svendsen 5:34

And it's interesting, it's such a, you know, which kind of relates to appreciative inquiry and potentially to board disruption. But that's real strengths based approach, less of the experiences that you've had in your life have led you to be incredibly adaptable and open to change, and presumably open to courageous decisions and all sorts of things. It's a great reminder for us about ensuring that we look for the strength in people and in organisations.

Repa Patel 6:01

Absolutely. And I think that strengths go with courage. But I read recently, the governance report around the fact that in Australia, boards are generally much more conservative, I think they looked at the Western countries. And we are can't remember the exact position we're in, but we're in the bottom third, when it comes to courage. And I think that goes with the whole question around diversity and diversity of thinking. Because when you have changed careers and change continents,

you know, changed your lifestyle, you get some of that courage, and you understand how to how to walk through that.

Helga Svendsen 6:39

Let's get more into that conversation then, about board disruption. And what's important, then, there, you talked about appreciative inquiry and using that, let's just start with that. What is appreciative inquiry, and how and why is that relevant in the boardroom?

Repa Patel 6:56

Yeah, so great question. And you've alluded to the key strength of appreciative inquiry, which is strength. So I've used that word, so many times in that sentence, but it underscores the approach which is very different in appreciative inquiry. So you know, normally, if you were going to use a well known methodology, like a SWOT analysis, it's equal parts strengths and equal parts, weaknesses, if you like. But appreciative inquiry starts with the premise of strength. So in other words, it starts with what's worked in the past, what's already going well, because in any change, you need to know what you're going to keep. Hmm. And we're not often very good as a board at thinking about that we're very good at thinking about what needs to change. Yeah. And sure, we do need to consider that. But we also, before we start with what needs to change, what are our strengths as an organisation and as a board? And what do we need to keep in the current context, then appreciative inquiry looks at well, what's our desired future? And this is, you know, when I facilitated it's a dream, literally. So I'm tapping into the neuroscience, so than tapping into the creative part of the brains of everybody in the room, beyond just, you know, what's our next increment? Yeah, it's what's possible for us, and then we get into, okay, so to build that future, what gets in our way? So we don't ignore the problems yet. We just don't start with them. Why is it important right now, because no one's got the answers. So there is no template for navigating this change that we're currently going through. So that dreaming part is really important. And it's also a highly engaging process. So nothing is done to people. But people walk out of the room. Highly enthused and engaged, it aligns their hearts as well as their mind. So you don't need to tell or convince people after that session that they need to go away and implement this. People actually walk out with a plan and self identify as being sponsors for that piece of work, and voluntarily wanting to implement that work, because it means a lot to them.

Helga Svendsen 9:02

I was having this conversation just yesterday with a client about strategy and that engagement in it. And in some ways, it matters less what the words on the page are, and more around how engaged people are in that process. So often, we get hung up on the wordsmithing of edits. Like Don't worry about the word smithing. What do we really aiming for?

Repa Patel 9:19

Absolutely,

Helga Svendsen 9:20

So you talked about getting boards into that dreaming space? Now, that's not often what happens around a board table. How do you work with boards to get them into that dreaming space? And indeed, you've been the chair of your board? Have you worked with your own board to get them into that space? And what did you do to make to allow water prompt and encourage that to happen?

Repa Patel 9:42

Absolutely. So if I could, if I may, I'll go through a governance process that we went through. Yeah, to enable me to do that. Great. As Chair Obviously, we've been through a number of previous strategic planning sessions, and to say that we didn't get value out of those I think it's probably a fair statement. I could say a lot more about that. You know, but I can't.

Helga Svendsen 10:07

And so let's do a strengths based approach. Let's start with what what to keep and what we're Yes, exactly.

Repa Patel 10:14

We had great incremental growth, we were a small organisation at that stage, and, you know, really struggling to get the growth in funding. And, you know, we work in the refugee space, so, so it was dear to my heart. And so I thought, I would love to bring appreciative inquiry into this process and do a full blown planning project with this organisation. But being the chair, of course, there was a conflict of interest. So I decided to donate my time. And what I did was, I stepped down from my chair role for that process. And I pitched the project to the rest of the board as a consultant, but donating my time. So I had to actually persuade the board for the first time and all of these board members, including the CEO, had never experienced appreciative inquiry before. So it was an uphill task for me. They were doing their jobs in being board members and saying, Well, why would dreaming work? Yeah. What? Why would acting out the dreams? in a funny way how's that gonna help us to grow the organisation? Yeah. So yes, I've been up against that what I do. So I had three PhDs in the room so I shared actually the methodology and the research behind it. So I looked at who was in the room? And what was going to persuade them? Yes,

Helga Svendsen 11:32

Yeah. No important to do.

Repa Patel 11:34

Absolutely. And I offered up some case studies and offered to introduce them to clients so that they could speak to them. One of the clients being a large bank. Yeah. So that kind of persuaded them that this was serious. It's not a frivolous thing that we're doing. The biggest concern I had from the board was, wait a minute, but we've got so many problems and challenges. We don't want to forget them. And I had to reassure them that we're not going to forget them. We're just not going to start with the problems. Yeah,

Helga Svendsen 12:05

right. Okay, so you take them through this process, to influence them about how this could be important and valuable to the organisation? And then presumably, you take it on? Yes. Talk me through that.

Repa Patel 12:20

It was a year long project. The whole point around appreciative inquiry is that the consultant me doesn't walk away with all the knowledge. So you know, how traditionally, consultants do certain strategic planning, they come in? They have a team of people, they do all the work they do, they interview everybody, the stakeholder, everybody, they gather the data and the knowledge, and then they give you a strategic plan. Yeah, appreciative inquiry is very, very different. Yeah, in the sense that so you know, the first role that a consultant has, the first role I had was to get a project team together on the organisation. So the project team then did all the stakeholder interviews, the stakeholder interviews, and input it into a two day summit that we ran, and the entire staff was involved in that summit. So that's the first time that the staff of this organisation were involved to that extent in actually creating the strategy. So not commenting on inputting into, but actually developing the strategy alongside board members. So sitting alongside board members, yeah. And then obviously, the the CEO and her her leadership team went away and prepared that the strategic plan off the back of the work that we did in that two day summit

Helga Svendsen 13:34

Amazing, so engaging the board and the staff in the program using that strengths based approach. So tell me about the strategy that came out the other end.

Repa Patel 13:45

Yeah, it was amazing. We almost doubled our revenue in that planning period. So much so that we used appreciative inquiry again, but this time we engaged, the board could see the value in paying

somebody else. And I wanted to participate this time. So I didn't want to be the facilitator. As you know, facilitators don't actually participate. So that was really hard for me facilitating something that I really cared about not having input into it. Yes. So the second time around that, that the success of this was not just the financial growth, but also organisational growth, our structure grew. So for the first time in the organisation's history, we had to consider, you know, how do we implement structural change? And then we completed that same process again, for the next strategic planning cycle.

Helga Svendsen 14:31

You know, in my head, I'm like, it sounds like everyone's always after the silver bullet and the magic. This is sounding a bit like the magic that might somehow do that an organisation. You can use appreciative inquiry, you can use this process and it results in exponential growth. Is it really the secret sauce?

Repa Patel 14:49

I think it is. The secret sauce is in the people and the way that they are engaged through the process. That's the secret sauce, right? It's not necessarily anything that I do. But it's fun. But what appreciative inquiry enables me to facilitate Yes. Which is the engagement of a different part of your brain a different part of your mind, a creative mind, including getting people into creative expression. Yes. And then helping them to see what's possible, and then building a concrete plan around delivering what's possible. That's really shifts the energy. Yes. And I think that's the secret sauce.

Helga Svendsen 15:27

Okay, so that really big creative thinking about what could be, but then bringing it back to concrete in terms of implementation and delivery.

Repa Patel 15:35

Yeah, absolutely. So there, I was talking to a friend last week. And she said, so what's your favorite part of the appreciative inquiry process? Well, what is it that gives you the buzz? And I said to her, I, you know, I do two day workshops, and I do one day workshops. Both of them have these two key pivotal points. One is about halfway through the process where we've just stood and reflected on the dream. And usually someone asks the question of this is all great report like, I mean, I feel really good. But how are we actually going to implement this. And that's great, because that's the second part of the day or the second, the second day itself. And then towards the end, you know, people have the realization of where we've gone from a dream of what's possible into an action plan. That's quite concrete. So I know exactly what I need to do. That's going to help us to achieve that. So those two are my favorite points.

Helga Svendsen 16:29

So it's fun, isn't it? When people say, oh, what about x y, z? It's like, great question. Let's move there. So I'm wondering with your board that you spent some time influencing to take this up, you know, you've got the PhDs in the room, and the people who are all very serious about things, you convinced them to take it up? How did they go in the dreaming space?

Repa Patel 16:52

They loved it. So here's what I know, from my experience. It's our mind, and our what ifs that get in the way, when I start leading a group through the visualization exercise and the dreaming exercise that I use. This was a group of about, I think it was 60 plus people in the room. There were only two people that I could visibly see, we're not engaging in that process. And that's okay. Because not everybody engages in every process. As you know, as a co facilitator, you have to expect that for some people that they're not going to engage. But most people follow the instructions. And they they surprise themselves to the point where the second time when I was pitching because it was a slightly different board at that stage. And the second time when I was pitching for having a facilitator come in and facilitate an AI process with us for strategy. One of the biggest doubters on the board, was my biggest supporter in putting it forward to the board. That's how it changed. And she actually said, honestly, I didn't think that this would work. But I found myself so caught up in what was going on that I surprised myself in how much I enjoyed it. And you know, look at the results that we've got.

Helga Svendsen 18:07

So you were the chair of the board, when you convince the board to take up this option. And you stepped out of the chair role. Did you remain on the board for that period?

Repa Patel 18:16

Only for non non related. So we were really clear about the decision making processes and any decision making process that happened about the engagement of me, I would step out of the room before Yeah. Right. And they would make those decisions. So I didn't remain as the chair, but for all other decisions other than, you know, should we engage this this person?

Helga Svendsen 18:38

Yes, it were these other mysterious person who might have the same name, but yeah,

Repa Patel 18:42

yes, yes. And we would openly discuss it. Well, we've got a standing agenda item, which was part of the governance that I introduced in my zoom chair ship, which was around Are there any conflicts of interest? Yes. So we will openly discuss is a conflict for me to be in the room when we're discussing the agenda items other than the ones that are related to my appointment, but in reality, because there was no payment involved. And the rest of it was just process once the decision was made. Yes, we we'd like to go ahead with this. Then the discussions were more around process and logistics, which were really about management's recommendations. Okay.

Helga Svendsen 19:19

And was there so it involves the board, it involves the staff. Does it also involve any external stakeholders to the organisation?

Repa Patel 19:27

Absolutely. All external stakeholders. So we interviewed the migrant and refugee women, the reserve, yep. And we imported their data, their comments, so we came up with it with an interview guide or an inquiry guide into around the topic that we were inquiring about. We talked to our funders to government, most state and federal, the other women's organisations as well that we partner with the researchers that we partner with. So absolutely. So it's a 360 degree, look at the organisation and the input comes from all aspects of it, and Not just the board. So as you know, traditional strategic planning process is generally the board and the leadership team, you have some input from staff. But this was a complete kind of look at the organisation from all facets. Fantastic. And you conducted all of those interviews with all of the stakeholders. No, I didn't. So this is the bit of appreciative inquiry, that's really important. It's the staff did that right, there was a project team that I helped skill up. So I helped them and walked alongside them as the way I describe it. But I didn't do those interviews, because the data would have been left with me. I can hand that over in raw terms to the staff. But it was the staff that were engaged. And that's when they when they talked to the women concerned that the migrant and refugee women concern, they got the real time stories from them. And that's what I mean by this process is highly engaging, yeah. Because they were then touched, obviously, by the stories and in compounded their, you know, sense of purpose in being involved in the organisation. And so it went far beyond a strategic planning process.

Helga Svendsen 21:03

Looking at a difficult balance in this, but having the staff undertake that engagement with stakeholders, whoever participants in the organisation, or funders or whoever it may be, do you find in this process that having the staff undertake that there is a risk that people won't be as honest as you would hope they would be?

Repa Patel 21:22

That's interesting, because we didn't find that. So we came up with an interview guide. So the questions were standard. And those questions had to be honest. So I guess that structure kind of helped. But I don't know about you, but when I'm asked something, I want to be honest. Because it comes back to you know, compassion. For me, compassion is not about being nice. Yes. If you're asking me, what can I improve? For me, the Compassionate response I can give you in an inappropriate way, is to give you the truth, because that's what you're seeking for me, you know, helped me to understand what I can improve. And we found that that actually did happen to stakeholders did say, look, we think your strengths are these. But we actually think that the areas to improve for you guys are here, and won't surprise you to learn that that wasn't a surprise to us. I know. You know, it's like, yeah, we really need to do this. And if our stakeholders are saying that, maybe we need to actually direct some attention and focus and some money towards that.

Helga Svendsen 22:21

What an amazing process for you to be part of both as part of the board and for an organisation that you care so passionately about, but what an amazing process for other boards to be aware of, and maybe to play with in their own strategic thinking.

Repa Patel 22:35

Yeah, I'd highly recommend it if you're looking for a process that will help, you know, significantly move your organisation forward. Yeah, then highly recommend appreciative inquiry.

Helga Svendsen 22:46

I should know we did a brief briefing, if that's a word just prior to this. And what I should have warned you of is the time goes super quickly, and today is no different. So what are the main points you want people to take away from the conversation that we've had today?

Repa Patel 22:59

You know, what got you here will not get you there. And what I mean by that is in a vuca. environment, were vuca. If you could just explain what volatility uncertainty, complexity and ambiguity on steroids at the moment, we don't know what the answer is. And the answer is different for different countries and different for different organisations. So what's worked in the past will not work in the future? What I would say is there are five key things that a board should consider when leading and governing through vuca. The first is fight for your focus. What we know from neuroscience is what you focus on grows. So I know that, you know, in the last year or so boards, particularly in Victoria, have had to focus on the operational. But be careful that that doesn't become

a norm. Now, a skilled chair will make sure that that doesn't continue to be the norm. But it also takes board members around the table to question you know, is this a governance or a strategic thing that we should be considering? If you're constantly problem solving, guess what you're gonna see more problems, right? So I'm not saying don't problem sort of what I'm saying is you might want to problem solve, but your focus might be on growth or focus might be on something that's going to help you navigate through this rather than just problem solve. The second is remember that your your purpose is powerful. And what I mean by that is, there's a growing body of evidence now that shows that when people and organisations align around purpose, they are far more successful. They have higher levels of wellbeing, higher levels of job satisfaction, customer satisfaction, engagement, profitability and productivity. So for the not for profit space, it's normal, but in the for profit space, it can be hard sometimes to understand that shareholder value is not going to engage the hearts of your people. So it's thinking about, you know, how do I ignite that alignment around purpose. The third thing is remember that change happens in this moment. So a lot of people say to me, you know, Reaper, to change the culture, or to change our direction, it's gonna take a long time. And I say to them, it starts today, you make a different decision, you take a different action, that's when change happens. So let's not be fooled by all this is a really big thing, it's going to take years. Sure, if you've got an IT system, it might take some time to change. But the first change happens with the board in the way that it thinks, and how it starts implementing some of the governance and strategy work that they do. Fourthly, courage is critical. It's the critical component of change. And we were talking about this earlier, right. And so, Australia is known as a quite a conservative countries. So having migrated from the UK, I can see that and I have read recently a governance report that compared Australia to to the rest of the Western world, or their boards in particular, or around courage, and risk taking, and it showed that we were in the bottom third. So in any change, you have to overcome fear, you know, you have to do that. And the last point I would recommend, sort of goes hand in hand with this, which is compassion converts fear into action. So the compassionate piece for a board is, look, no one's got the answers here, we need to have the courage to do a few different things that we haven't done before. And understand that some of them will fail. But what we want to do is learn from them. So that's the compassionate piece.

Helga Svendsen 26:40

Absolutely they are five fabulous tips for boards. And, in fact, if you've got that piece of research around courage in the boardroom, if you could send it through to me, I'll make sure we put a link to that in the show notes as well. I know, I don't think of myself, and I don't think of our society is particularly conservative. So it's really interesting to hear that because if we are in it, we probably don't know it and feel it. So yeah, that'd be an interesting one. I'll share that in the show notes. Absolutely. Speaking of the show notes, is there a resource that you would like to share with the take on board community,?

Repa Patel 27:12

If you've liked what you've heard so far, in terms of moving your board forward, I just published a book called "Elevate a new path for leaders to lead through uncertainty." And it's got some practical

tools and resources that you can apply. So it's got some really practical things you can take away to implement change.

Helga Svendsen 27:33

Fantastic well, let's do something with that. Let's do shall we give away a couple of them? Why not? So how we do this, folks, if you've heard the conversation that we've just had, should we do it around? Let's just make this up as we go, should we do it around the five? The five points that you've just asked?

Repa Patel 27:56

Yes. So maybe maybe if you've got a good example of where either you individually, or you, with your board, have fought for your focus, so let's summarize them for people fought for your focus, understood that your purpose was powerful, you know, understood that change happens in this moment, that courage is a critical component of change. And that compassion converts fear into action. So any of those things, if you've got a brilliant example, what do they need to do with that you might actually win a book.

Helga Svendsen 28:27

Yeah, so folks, if you've got an example, around that big or small, know that some of these things don't have to be the big processes that you've gone through, it might have been just something you did in a meeting or something or a mindset shift or a mindset shift in you that maybe nobody else even knows about. If you can share that with me in an email. All of my contact details are in the show notes. So you can message me through LinkedIn or email or whatever, share it with me and we'll have a look through and a couple of you will go home with Repa's fabulous book so that you can put more of this into action. There we go. We love it when it comes together in the moment. Oh, okay. Well, thank you so much for coming to me in downtown Thornbury sharing a cup of tea with me being able to reconnect after so long being apart, and most importantly, sharing your wisdom with the take onboard community today. I know people will take a huge amount away from it. And I look forward to the stories that people will share with us around how they might put some of this into action or have already put some of it into action.

Repa Patel 29:27

Fantastic. Thank you so much for the invitation, Helga.