

Take on Board Podcast – Episode 265



Transcript – Strategy Mini-Series

Felicity Green starts by developing and reviewing strategy

Helga Svendsen 0:00

Today on the Take on Board podcast, I'm speaking with Felicity Green about developing and reviewing strategy.

Helga Svendsen 0:06

Before we start the podcast today, I'd like to acknowledge the traditional custodians of the land on which we record. For me I am on the unseeded lands of the Wurundjeri people of the Kulin Nation, and I pay my respects to elder's past and present. I also acknowledge any First Nations people who may be listening today. I acknowledge their continuing connection to land waters, skies, culture and country.

Helga Svendsen 0:31

Now, let me tell you about Felicity. Felicity is on the boards of the Royal Children's Hospital Foundation and WaterAid Australia. And she has previously been on the board of Connected Communities Melbourne.

Helga Svendsen 0:43

Felicity is the co founder of impact led consulting practice Ensemble Strategy, helping clients across the not for profit, government and philanthropic sectors to create strategies for a fairer, safer and more sustainable world.

Helga Svendsen 0:57

Previous to this Felicity was the CEO of Spark Strategy. With an MBA from Peking University, multiple not for profit board positions, and recognition as a finalist in the Telstra Business Woman of the Year

Awards, she has a proven track record of innovative strategic thinking that drives tangible impact. Welcome to the Take on Board podcast, Felicity.

Felicity Green 1:19

Thank you for having me.

Helga Svendsen 1:20

It is so awesome to have you here. And in fact, I should say this is the first in a series of podcasts, which are doing a bit of a deep dive into the topics that are covered by the not for profit principles of the Australian Institute of Company Directors, which is not to say that these podcasts will just be about not for profit organisations, because the principles, and indeed the stories will be I think, relevant to all sorts of organisations. So thank you for answering the call. I did a post on LinkedIn saying, right, I want to do a deep dive into these topics. And um, I think you're actually nominated for it. I'm not sure if you initially put your hand up.

Felicity Green 2:00

I think I got Voluntold. I love this term Voluntold. I think so. But I always love to be the first because life is sort of an eternal experiment, isn't it? And I'm always trying to encourage clients that even though it hasn't been done before, let's try something new. So very happy to be first cab off the rank.

Helga Svendsen 2:18

Excellent. Well, thank you for being here. Thank you for answering the call. Thank you for being voluntold.

Helga Svendsen 2:25

But before we dive into developing and reviewing strategy, which is one of the key elements of strategy, as always, I want to dig a bit deeper about you. So tell me about your upbringing, what lessons you learned, what you got up to, and some of the leading influences on how you thought and what you did?

Felicity Green 2:43

Yeah, I guess similar to a lot of people, when I think about what are the key influences from my upbringing that have led me to where I am today, it really comes down largely to my family life and my education. So maybe I'll explore a little bit of each of those.

Felicity Green 3:01

I'm so grateful for the family life that I've had, I was brought up in a fairly working class household, but it was one that was very intellectual, and also had a really strong, I guess, ethos of servitude as well. So my mum was an incredible woman, she was the first woman in the world to get her PhD in her field. And she's made an amazing impact to particularly children's eye health. And my dad was the I guess, perennial entrepreneur, which I definitely have inherited from him. But he was a philosophy teacher, but then also a businessman and did a lot of a lot of different things. So needless to say, dinnertime conversations at our table, were really hilarious. They range from you know, me fighting with my sisters through to having big existential conversations.

Felicity Green 3:51

And I think if I sort of sum it up in one memory, I would have been quite young, I think I would have been in primary school and I was sitting in the back of the car. And we saw the car in front of us with a bumper sticker on it that said, subvert the dominant paradigm. And I didn't know what any of those words meant at the time, but my parents took the time to explain to me the whole concept. And it just resonated with me so much. And it's sort of this core belief that I hold through to today. But actually, just because things are the way they are doesn't mean that there's not a better way to do them.

Felicity Green 4:26

So that's something that I carry through into my strategy work today is something the way that I approach life and the way that in board work, both as a board director and working with boards, trying to really think about leadership and the way that we can change things.

Felicity Green 4:40

Now to education. Again, I was privileged with a wonderful education. And if I hone in on my post grad studies, I spent the majority of my 20s living in China. And it was a wonderful experience to just be somewhere so culturally different from what I knew it made me question all those assumptions that I didn't know I had but also it was very confronting in terms of the inequity in society was very stark, very obvious.

Felicity Green 5:07

So where I live in Beijing, you know, on one side of me, I had very wealthy diplomats. And literally on the other side of me, it was a construction site, which had really disadvantaged workers that basically sleeping on the street. And as a young person that was very confronting, and I sort of had that moment that saviour moment where I decided that for my career, I'm going to use my skills for good, but I didn't know what that meant. And I came back to Australia. And because I'm somebody that needs to be doing something different all the time, I ended up in corporate consulting. And it was pretty soon into that journey that I realised, I'm a bit uncomfortable with this, I'm not really fulfilling what I said I would do helping the big blue chip companies with 2% on their bottom line isn't really doing anything to do with inequity. So that started my journey of then founding a couple of social impact consulting firms.

Speaker 1 6:01

Oh, my goodness, wow, I totally want to get on to developing and reviewing strategy. But I also want to dig in a bit there back to your first part about subverting the dominant paradigm. First up, can I say very courageous parents of yours, to encourage their daughter to subvert the dominant paradigm, because back then they were the dominant paradigm in the household. So pretty courageous on their behalf. And I imagined that every now and again, they may have just regretted that ever so slightly.

Felicity Green 6:32

Oh, absolutely. And I have to be careful with that. Now I've got to have my own sort of teaching them the same thing. And I think how far are they going to take this with a license to not listen to what I'm saying?

Helga Svendsen 6:42

I know, it's so interesting that the characteristics that you really admire often in adults might not be the ones that you admire in your children. And I guess it's just holding that there. It's okay, this is good, independent, they will turn up to be excellent, well rounded adults, even if they're driving me bananas right now. I'm interested. What was it that inspired you to go to China like you went there, it was all completely different. What was it that led to that decision to go to China to study?

Felicity Green 7:14

It's one of those funny things where one thing just led to another that led to another led to another it was actually back in high school, we had to study two different languages. And it was just sort of like, oh, well, I guess I'll do do a European one. And I'll do an Asian one. And I actually really fell in

love with many facets of the Chinese language actually came from a love of the language. And in my undergrad here, I did an arts degree. And I majored in linguistics and Mandarin, I was so fascinated by some of the concepts behind the Chinese characters, you know, when you put a mother and a child together, that is the character for good, because there's nothing better than that. So I went to study that actually. And then realise when I wanted to have a career in consulting, actually, I probably better learn something about business as well. But I wanted to be over there. So I actually got did my MBA over there, and got to live a really fun life at the same time, as doing my studies as well.

Speaker 1 8:14

I said, at the top of the episode, this series, we're doing a miniseries around strategy, this is the first one developing and reviewing strategy. So I know you're on the board of a couple of organisations. And I think you might have a little story to share with us from WaterAid.

Helga Svendsen 8:31

So what can you share with us around developing and reviewing strategy? What was the experience like water aid that others might be able to learn from in relation to this? Where should we start the story?

Felicity Green 8:42

Yeah, the WaterAid one is a really great one, because anybody who's involved with global federated structures, knows that they come with a lot of strength. And also, obviously, a lot of this was called them intricacies. And being on the Board of WaterAid was fantastic, because while the global body took the lead, and consulted directors from across the whole federation, we then really had the ability to regionalise it and make it appropriate to our context.

Felicity Green 9:13

And I'm very proud of the way that WaterAid Australia has done that. Because after we, we were consulted, and we had input into the overall global framework, then we really handed it over to our country directors to turn this into what does this mean for us? And how is it going to create great impact within our context?

Felicity Green 9:35

So we have country programs across Cambodia, Timor-Leste and Papa New Guinea, and in our own quest to decolonise our practice, we then let the regional strategies be led by them. And then it was

a partnership and an iterative process back and forth to really land that so as directors, we felt comfortable governing that strategy, but it really meant something. And it had that an inherent buy-in from our country directors because they were the ones that helped to develop it in partnership with our senior management team and the board here.

Felicity Green 10:11

And maybe Helga, if I may, one of the things that I thought might be useful talking about is the role of board directors versus the executive team or the senior management team, or however you want to call it in strategy, particularly in the development..... It's a very hotly contested topic. And people have all different views, some argue that strategy belongs to the board, it should be set by the board approved by the Board evaluated by the board, and the CEO, or the exec are really just simply there to carry out audits.

Felicity Green 10:48

And I guess the opposite can, their view is that the CEO or the executive, they know far more detail of the organisation than the board ever will. And therefore, way better place to just develop the whole lot, develop it, serve it up, wrapped up in a bow for approval, and then go ahead and execute it. And through my experience of working with organisations, but also being directors, being a director on boards, I actually think the right balance lies somewhere in the middle there. And that's where the magic happens. And yes, of course, we know that the board is the custodian of strategy. And they have that ultimate accountability. So of course, they need to be involved in the process. But in reality, it's like a group of people that meet monthly or maybe even quarterly, and they can't realistically be expected to understand all the nuances of an organisation to the extent to be able to develop that practical way forward.

Felicity Green 11:47

In my experience, I think the most effective way that the board can add value to the strategic planning process is to contribute insights and perspectives and raise challenges and identify opportunities at key points along the strategic planning process. I do believe that the arm's length from the day to day is actually a really big benefit. Because often you can ask questions about why is it like that, bring some of your expertise from your other industries, to really unlock key points of value, I think there needs to be a good balance of empowerment with the executive along the way, so that there is this strong joint ownership at the end of the process.

Felicity Green 12:34

So when I run strategic planning processes, for example, I encourage both executive and board to be in those key workshops together. I like to mix up the groups so that you have some of that

institutional knowledge with some of the putting purpose right at the centre. And I do believe that's a bit more of a contemporary way for board directors, to partner with their exec teams to develop strategy.

Helga Svendsen 12:58

Yes, one after my own heart bear in these things. So with WaterAid, how did you get that magic in the middle? How did it play out for you there that you could achieve that magic in the middle?

Felicity Green 13:11

I think it was having a structured process. So absolutely knowing where we were, at each time, allowing for expensive thinking, first, having a lot of engagement and making sure that voice of lived experience is squarely at the centre of that.

Felicity Green 13:32

And then also just not being afraid to share when things are messy. I think sometimes we feel like we have to present a big 'Ta Da' moment, like sort of the big advertising reveal. But I do believe that creates a genuine partnership between directors and organisations, when there's that honesty of actually, we haven't solved this bit yet, we're struggling with this element. We don't know if going this way will affect our financial sustainability. What do others think? What have directors seen in other fields when we've been facing this challenge?

Felicity Green 14:11

So I think having that really open dialogue and creating space for it is really critical. And I have to really pay tribute to WaterAid, Australia's senior management team, in being the conduit for that, and keeping the board updated and informed but then we would carve out time in our board meetings for us to be able to add our perspectives, also provoke and ask questions.

Felicity Green 14:37

Because I think as a board director, sometimes your job is to gauge whether or not we're all getting a little bit Kumbaya and just like yeah, yeah, that sounds great. Or if we're being the other way and being a bit too negative, and risk is so important. But having such a strong risk focus that we're not allowing strategies to breathe and be explored.

Felicity Green 15:00

So I think that was a balance of that we gave it time space, we had a structured process, it was true iteration. And then since then, which will I'm sure we'll get to in a moment in terms of reviewing and keeping things alive, we've kept our strategy on a page in our board papers and things like that. And our reports are all aligned to that direction, the business plans are etc. So I think genuine relationships, genuine communication, a structured process, and just not being afraid to let it be a little bit messy. And trust that we're working on this together.

Helga Svendsen 15:37

We will get to the how to keep it alive in a moment, I promise we will, I just wanted to dig into one part of what you talked about there.

Helga Svendsen 15:44

So yeah, you've talked about the relationships, the communication, and so on.

Helga Svendsen 15:47

Right at the start of talking through that you talked about having lived experience and bringing that into the conversation as well. I'd be really interested to hear again, how that worked in practice, in this process, because it can be tricky. So I'd love to hear how that worked in this strategy development process.

Felicity Green 16:08

Absolutely. And I think that's probably the most important thing in any for purpose or impact lead strategy, because it's different from corporate competitive strategy where you're just trying to maximize shareholder value, what we're doing here is we've got to maximize stakeholder value. And our stakeholders are really who we exist to serve.

Felicity Green 16:27

There's lots of ways to do that. And I think one baseline way is looking at data. So data from programs, obviously, all programs are evaluated. So looking at what has worked and what hasn't worked as a proxy for the voice of the communities.

Felicity Green 16:46

But then there's using your staff as the key relationship holders who are interfacing with the communities every day. And they have deep knowledge of the patterns of feedback that they're getting of the needs, the wants, the challenges, the opportunities.

Felicity Green 17:07

And then of course, there's absolutely direct engagement, if that's appropriate, as well. So through this process, we very much use data. And we also used representatives from our country programs as the proxy for voice of lived experience. And they also went out and engaged in communities to feed into the strategic planning process.

Felicity Green 17:28

In my other work, it's often work at the moment with a community health provider, and within all of their community centers, we've set up iPads and whiteboards and things like that, for people to share their perspectives of where they'd like to see the future of Community Health going, you know, that's really great lived experience data within their natural environment, rather than saying, let's organise focus groups, which are also great things to do. But sometimes, depending on the subject matter, it's not appropriate as well, if you're dealing with victims, survivors of different issues, etc.

Felicity Green 18:01

So lived experience so important to have that at the heart of your strategy, I think, to get in the insights gathering stage, but also looping back at the testing stage as well. So once you have a draft, strategic framing, or this is where we think we're going, going out back to those communities or to others within that community, and asking, What do you think of this? How would this affect you? Is this a positive thing? If not, how would you tweak it? etc.

Helga Svendsen 18:29

In this process, building relationships during the communication, having a structured process, engaging lived experience, voices? How long does all of that take? At WaterAid, from go to whoa, are we talking a month, six months a year? More or less? Tell me about that timeline of developing strategy? What's worked for you?

Felicity Green 18:52

Yeah, I love that question. Because you can answer that with how long is a piece of string?

Felicity Green 18:58

Often, often, strategy development comes practically down to your time, your budget, your resources that you have available, etc. And some people do it in a one day strategic session and just rely on their own knowledge to have well facilitated conversations. And that's a very short process, all the way through to a year long process where if you're doing a big systems change piece, and you have to go out to multiple communities, you need to organise really complex stakeholder engagement, etc.

Felicity Green 19:32

I think if you're following a pretty standard strategic planning process, which might include some scoping, and some practical set up, some engagement, where you're doing listening, some probably workshops, where you're working with your boards and your executive, hopefully in partnership, to start to put some shape around it, a little bit of testing back in with communities and then the actual development of the final output. I think sort of four to six month process is ideal, because it allows time for you to learn to listen and learn.

Felicity Green 20:10

But also, it goes with the momentum. There's nothing worse than people thinking, oh my gosh, this bloody strategy that we still haven't solved, like, we're not doing our strategy in a vacuum, the world is changing, and we've got work to do. So I do really believe in harnessing the energy and the momentum. So I've generally, even if you're investing heavily in a process, like we did at WaterAid, you wouldn't want it to go more than a year. Definitely.

Helga Svendsen 20:39

I agree. Yeah. You want to land it at some stage. And it doesn't mean it's set in stone for the period, whatever the period may be, it can get reviewed and tweaked along the way, but you need to land it.

Felicity Green 20:51

100 per cent.

Helga Svendsen 20:52

Oh, look, we've covered so much already about developing strategy. I'm wondering, what should I have asked you about developing strategy that I haven't?

Felicity Green 21:01

Maybe what the pitfalls are, when you're developing strategy, if you thought of things, maybe that that will hinder getting a really great outcome. And if I think, particularly from a directors perspective, I think asking questions in a way, that's not respectful. So if you're getting presented some strategic hypotheses from the organisation, from the team, they've worked really hard, they come back to you. And instead of saying, have we thought about something else, often we get, why haven't you thought this? And why haven't you done that? And I think that that type of communication, from directors in the strategic planning process, still a little bit of fear, or a little bit of resentment, and it just breaks down that relationship, rather than recognising that we're all part of this organisation, we're just wearing different hats. And let's partner on this. And let's work through together.

Felicity Green 22:03

So I think the other piece is sometimes getting distracted by where the money is. And particularly in the for purpose space, it's often a key pressure. And so it's very tempting to think short term, and to go for scope creep, and things like that. So again, as a director, if one of your key roles is to hold purpose, front and centre, is this helping us achieve the reason that we exist?

Felicity Green 22:32

So I think it's okay to sound like a broken record, if you're a director. And every time we say, will this help us achieve our mission? Is this leading us towards our vision?

Felicity Green 22:42

And sometimes if we lose sight of that, and just think, oh, if we go and we do that program, as well, that helps fill the hole for that bucket of funding, it's not super strategic.

Felicity Green 22:52

And finally, probably leading on from that would be delving too much into operations and doing more operational planning, rather than taking this wonderful opportunity to actually step above the clouds, have that higher altitude. I mean, yes, there's a lot of responsibility about being on a board, you've got your fiduciary responsibility, there's lots of risk involved, there's compliance. The strategy piece, is the really incredible opportunity to add a lot of value in helping guide this organisation and set some of those parameters that will help everybody make really good decisions going forward. So I think embracing a really great creative process and not getting stuck in the operations, which really is for the executive to take forward.

Helga Svendsen 23:40

So Felicity, so many nuggets of gold in this conversation, you know, around developing it, and the pitfalls and all sorts of things. What are the key things you want people to take away from the conversation that we've had today?

Felicity Green 23:54

I think the key things are around embracing the joyful process. That is strategy development. And it's such a wonderful part about being a director or a leader within an organisation. I think also really trying to forge that strong partnership between the directors and the executive, because that will create that common understanding. It'll create buy in, and it also helps you problem solve together along the way.

Helga Svendsen 24:27

And is there a resource you would like to share with the Take on Board community?

Felicity Green 24:31

Considering that this is such a wonderful podcast, I was thinking about other podcasts that share people's stories, but also really helped build capability in terms of this impact space, and a favorite of mine is Humans of Purpose. Excitingly, this podcast is actually just being handed over as well. So Mike Davis, built it up, and he's now handing it over. And I think it will be wonderful to hear new voices within that journey. And it's it's just a great listen to whatever you're doing, and I always find it inspiring and thing yet there are lots of people out there fighting the good fight. And I love to hear their diverse stories as well.

Helga Svendsen 25:10

Fantastic. I had seen that you were putting that down as your resource. And I, I thought when I looked at her when I think Mike's handing that over to somebody, and I love that he's actually handing it over and not just retiring the podcast, but as like, yeah, it can go on for a life, much like good strategy, perhaps in a way it can go on for a new and different life elsewhere. Yes, he founded it and was the custodian for that period, but somebody else can take it into a different strategic period as well.

Felicity Green 25:36

I love that analogy. And yet Melanie, who is passing it on to will do a great job.

Helga Svendsen 25:40

Oh, fabulous. Felicity Thank you. Thank you so much for taking the time to delve into developing strategy. There's so much in here for people to take away for their own board practice. So thank you for taking the time to share with the Take on Board community today.

Felicity Green 25:56

Thank you so much for having me.

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