

Take on Board Podcast – Episode 208

# Transcript – Melissa Donnelly brings strategic planning into the boardroom to maximize lived experiences



Helga Svendsen 0:00

Today on the Take on Board podcast, I'm speaking with Melissa Donnelly about the importance of strategic planning as a vehicle for bringing lived experience into the boardroom. Before we start that discussion, I'd like to acknowledge the Traditional custodians of the land on which we record this podcast today. For me, I am on the unseeded lands of the Wurundjeri people of the Kulin Nation, and I pay my respects to Elders past and present. I acknowledge their continuing connection to land to waters and to culture. I support the Uluru Statement from the Heart and I encourage others in the Take on Board community to do the same. Now, let me introduce Melissa. Melissa is the chair of Domestic Violence Prevention Centre based on the Gold Coast.

Melissa has been called a brain surgeon for brands. She extracts the DNA of businesses from the CEOs brain and injects it across the organisation. In her 35 year+ career, she has triaged, rebooted and launched brands internationally and domestically. Melissa has been a Brand Builder for household names like MTV, ESPN, Microsoft and Telstra, plus brands that are rockstars in their own industries. If communications are at the heart of an issue, then chances are Melissa has seen it, mapped it, solved for it. This is the lens she brings to her board role, where she focuses on building a culture of intentional communications that connect board members, the organisation and stakeholders. Welcome to the Take on Board podcast, Melissa.

Melissa Donnelly 1:32

Thanks for having me.

Helga Svendsen 1:34

So awesome to have you here. And I love, I'm looking forward to might be a better way of putting it the conversation about strategic planning as a vehicle for lived experience. However, as always, let's dig a little bit deeper about you. Before we get into that. Tell me about your upbringing and what

lessons you learned, what you've got up to and what the leading influences were on, you know how you thought and what you did.

Melissa Donnelly 1:59

That's great happy to share. I'm actually an army brat I guess is the best way to describe my, my upbringing. So uprooting, shifting, planting new roots is all built into my DNA. And maybe that's why I've got an obsession with organisational DNA. Because I know how fundamental it is to you know, the reason you get out of bed every day.

So I was born in Singapore, lived in Malaysia, and then New Guinea, before heading home at the ripe old age, I think I was about five and living up and down the east coast of Australia while my father was still serving in the army. So I've never known a linear existence, I've never grown up in the same place, gone to the same schools have the same groups of friends. And as a result, I've never had any aspirations to do the same in my life. I didn't intend to move our children as much as we subsequently have, but you only live once. So I love the saying in a professional sense of when you're climbing the corporate ladder, all you'll ever see is the ass of the person ahead of you. To me, that's anathema. I just couldn't imagine having a single career or working in a single place. And no disrespect to people have but again, it's alien for for me, and I think that was so driven out of of living this gypsy lifestyle, I guess. So you know, when I was 15. And I've written a LinkedIn post about this, a year or so ago when I was 15 my career aspirations all at the same time, which would be a children's book author, astronaut, prima ballerina, Olympic swimmer, and a micro surgeon definitely didn't have the academics for a lot of that. But I even wrote to NASA to find out how to become an astronaut. And they wrote back, it was hilarious. So I guess, you know, I've always seen like, rather than this corporate ladder, where you're just looking up at the person ahead of you, I've always seen life as a jungle gym. And that's something that women tend to do really, really well. So whether it's been competing in sport, or parenting, or being a partner or daughter, I've my career and certainly my life has been these series of movements that are sideways, upwards, downwards, lateral, they've never been in any particular order, but there is a rhythm to it, and a flow to it. And you know, I've lived by the mantra, never walked past an open door. Not everything's worked out when I've gone into the room, but I never walk past an open door and I'll never die wondering. And that's been probably the two things that have driven me. And I think, again, that's been motivated by this gypsy upbringing that I had, with a lot of discipline and things again, you know, daughter of an army officer, but we were on the move a lot. And I think he learned to be a little bit fearless and a bit courageous as a result of that.

Helga Svendsen 4:45

Interesting. It's so interesting hearing that story. I mean, what I hear in there, you know, what I think about now for you being in the boardroom is about those different connections and being able to make connections. You know, you're not just looking down one path, you're looking at many different paths, and what is the best path rather than just following this one. And I also hear in

there, you've got a real love of learning as well. I love that you wrote to NASA. Have you still got the letter that they sent back to you?

Melissa Donnelly 5:12

I do have it tucked away somewhere. And I keep threatening to pull it out and embarrass my kids with it. So yeah, I was I just couldn't believe they wrote back. And again, I think it's part of this thing of if something feels like I've done it before, and exactly that same way, I questioned why. And, and if it was an immense success the first time fantastic, but you really only learn from failing. So you really are rarely going to be replicating something completely, because very few things are 100% successful the first time around, they can always be better. So yeah.

Helga Svendsen 5:50

I could stay in these stories for the whole conversation. But I don't want to because I really want to talk about strategic planning, and using that as the vehicle for you know, bringing lived experience into the boardroom, such a great conversation to have. So where should we begin?

Melissa Donnelly 6:10

And look, I think, and again, it was it was interesting thinking about, you know, strategic planning, it's, it's always an agenda item, right? For every board, it's always sitting on the agenda, I've been worked with several boards. So I kind of have two roles here. I've chaired the Domestic Violence Prevention Centre board, and I've been a director on that board for five years. But in addition to that, I've advised as a brand and communications strategist, many, many boards here and overseas over probably the last 15 years, particularly. So a lot of them, we will structure up a system where they might have a quarterly strategic planning meeting, in addition to the regular cycle of board meetings. So I know it's always on the agenda. But what's also interesting is that in my time, I've seen very few really good strategic plans come out of boards and organisations, and particularly, I think, in the for purpose, environment, and not for profit environment. Again, most of these boards, and most of these organisations are sprinting to keep pace with demand for services. So it's not through lack of will, it's just through where it sits in the priority scale. And I think the downstream effect of that is that ironically, the very people that the organisation is there to serve, get lost in the day to day busyness of everyone doing what they're doing. And that voice will be heard at the organisation level, it will be heard of contact points within the organisation. But often it's not heard at the board. And again, if you think even the people listening, if you think yourself to board meetings, you're in how frequently is the client or member or customer of the organisation in the boardroom, whether that's physically or metaphorically.

So I guess what strategic planning does is when the board is involved at the right level, and that's always again, an issue to be determined by the board. But when the board is at the very least

facilitating resources and focus on strategic planning, and potentially working around the framing of that strategic plan, it starts a process. And part of that process is bringing the voices of staff into that documentation and bringing the voices of customers and clients and members into that conversation. So it just means that you then have a process and a framework. And then you can as that's being implemented throughout the organisation, you've got regular touch points where that voice comes back in and then you've got review processes where you go back out again, and you speak to customers and staff and I'll use the term customers here but with an understanding we're talking about anyone the organisation is there to serve. So again, there's there's that process and that mechanism for that voice to be heard in a continual way. So I guess that's where I see it being such a powerful vehicle and just so important, because we do we forget about the customer, you know, I've been known. And it isn't always met with smiles and cheers. But I have been known to bring photographs into into meetings and into facilitated environments, particularly with boards, have customers or I will leave a seat at the table for them. And for some board environments, again, DVC is an example of that we don't have victim survivors on the board, some boards you can in our environment and with our Constitution, it's not appropriate. But we have a mechanism where the client, the victim survivor is represented in the board meeting and their voices heard in the board meeting. And so I will do that as physically as I can when it's required.

Helga Svendsen 10:01

So you're the chair of Domestic Violence Prevention Centre, and I think relatively recently have refreshed your strategic plan. Talk us through how it worked in that organisation about bringing that lived experience into the boardroom, whether that's staff, members of victims, survivors, members, whatever it may be, how did it work in practice there? Tell us that story?

Melissa Donnelly 10:24

Yes. Well, when I first joined the DVPC in 2018, the organisation had for many years been trying to almost curate its strategic plan, because so many of the pieces of it were already sitting in the organisation. So I took it as a personal mantra or mandate, I guess, to bring focus and resources to it. And again, because of my professional expertise, you know, that was something that I could do and support the organisation with. So the point that we started at, and that I will always start any of these processes, that is the insights, what do we already know about the staff and about the client, and their journey through this dreadful issue? That is, you know, just a scourge in our in our community. But what is the journey through domestic and family violence for both of those parties? And how can we, at some degree map that it's incredibly complex, of course, and it's not simple, but how could we at least understand that the various touch points they had with the sector? What was the data, we were gathering at those points, and there was loads of it. So we were able to start on a wealth of data that we could then gather, curate and determine insights from and then it came back into the organisation to work through a fairly standard strategic planning framework, you know, what do we want more of less of the same? What are the going to be the key pillars of the strap plan, etc. What became evident as we refer way through the process, though, was what we couldn't do was take a commercial lens on KPIs and objectives and apply that in this sector. And again, we

had very little as a reference point to go back to because the way we were doing things, we were almost establishing practices as we went. So what the leadership team at DVPC went away and didn't, it was a brilliant piece of work, and has really, to me been a benchmark for the way these things get done, is they took the section of the plan around KPIs, and said, really, what it needs to be is a measure in inverted commas of what women are going to say, if we're achieving the vision of the organisation that we've set for ourselves. So what are they saying now? That's our bench? What are they going to be saying? So in some sections, the voices of women and children were replaced with staff and other stakeholders, because that was relevant. If you're talking, for instance, funding and revenues, which are obviously important for strategic planning. It was the voice of the funder that came into the equation. But it just meant that we reframed that plan in a way that when the organisation came to start implementing it and bringing the organisational planning into it, they really knew at a granular level, this is the North Star, this is what we want her to be saying, if we are creating and building a community where women and children are free to live, without violence in their lives, and that's effectively the vision for the organisation. So we are partway through that plan. Now. It's got a 2024 lifespan on it. We did a very short horizon because we were building it through COVID. But I'm really going to be looking forward to seeing this year with a new CEO, but also with where the plans at how close are we and we've got all the data to glean from how close are we to really hearing those statements in the way that we'd anticipated back in 2019, 2020, when this plan was being ideated. And again, this organisation sits on a wealth of data. So they run focus groups at intake, they are asking women all sorts of questions that they can extrapolate these data and this information from and I think in this environment, what was particularly critical is that the victim survivors are largely invisible in this conversation. So even though you know, we hear horrific stories, and we read media reports, that incident is one of many, many, many that have been going on often for many, many years behind closed doors. So to be able to surface and give visibility to these voices is actually in terms of the values of this organisation. Critically important. It's honestly hands down. Probably one of the proudest moments was seeing the Attorney General of Queensland launch that plan and it wasn't because it was a ticket box on a goal that we'd set back in 2018. It was because this plan has in my mind shifted the needle about the way we reflect the strategic planning process in these types of organisations?

Helga Svendsen 15:08

Oh, you know, you're literally using the voices of, you know, what would people be saying now? What do we want them to be saying later? And what I heard in there, I was about to ask you about how do you know that were the data points, but you've talked about that, in a way it's the intake process. It's part of the focus groups, and so on, that you do with the victim survivors that you are working with and for? I'm wondering for those other areas, because you talked about funders, you talked about staff, how are you capturing the data there about the voices both about what people are or were saying, and what they will be saying, come 2024 to do that check in?

Melissa Donnelly 15:45

In terms of the staff, again, they were heavily consulted with, and they've informed the process. So so this plan, and this is why I'm always eager to understand and make sure we're clear as board, what our role is, because our role is not to populate that plan. To me, that is executive leadership team to facilitate that. But what we did do, and this is where I sort of stepped into more of my brand, communication strategists mode was created environments and created frameworks to gather the voices of staff and the voices of the leadership team, so that that process was very much owned within the organisation. And then the board was was there in terms of overwatch and to be informed and consulted with as needed. So again, there are professional supervision and also, which, again, is confidential. But there are mechanisms that already happened within the sector environment and within the DVPC, which mean that staff regularly talk about these issues. Implementation of the organisational plan, again, when you're implementing, you're talking, you're listening, you're and this is a heavy listening based environment. So there's already I guess, in the professional practice that staff members conduct themselves with, this is what they do. So they listen to hear, and then it's a case of in an appropriate way, recording the bench line, what's being said now, and then saying, aspirationally, where do we want to be positioned. And from a funding perspective, again, the organisation has 22 years of data, it's been state government funded for that time, in terms of majority funding. And this is where again, you bring in not just these qualitative measures of success, but then you do look at quantitative measures of success. And we are held highly accountable for every cent of funding that comes through the organisation. So we're able to measure how it's being utilized, where it's being utilized, what the balance of those of that time, and funding is over any particular period of time, and the documentation, the emails, everything that you've got in writing, you can then draw out of that, these conversations and this voice. So there's plenty of mechanisms already built in most organisations. And I think it's until you have a reason to look at it. In that way, with that frame around it, you just don't see it, you don't realise this wealth you're sitting on.

Helga Svendsen 18:14

Interesting well, so I'm wondering at that side as well, it sounds like, you know, it was embedded in the staff work in a way to hear that voice that is their core to their work. I'm guessing for them, it was a massive relief and celebration that the board was putting it at the center of the strategic plan. I'm wondering with the board, I'm guessing it was a slightly different way of doing your strategy, then you've done previously. So if there was any, in as much detail as you're able to share whether there was any resistance might be to higher frame on it, but just how the board coped with doing it in this way, which was probably a different way of doing things.

Melissa Donnelly 18:52

That's a really good question. The board it was again, it was a heavy consultative process, they were involved directly at a couple of points in terms of the board collectively. So when we ran the first strategic session, where we really laid down some of the key milestones and clarified the vision and

values, etc, for the organisation, the board was all in the room for that. So I guess it would have been evident how important it was that how we determined success for this plan. And I'm always loath to use that word when it comes to an environment like this because success is nothing like we can imagine it's basically making yourself redundant as an organisation. But I guess there were no surprises around the fact that the way we defined and determined the objectives for the plant, we're going to have to be different we couldn't follow any sort of commercial model. The other thing is in terms of the makeup of the board it is a very as most boards are I'm sure deliberately structured board so we bring in some commercial expertise so people like myself around brand and communications in Marketing. But we have a mix of individuals from the sector, or from Allied sectors we had, at the time that that particular plan was done, we had an HR specialist who had been who'd come out of sector and gone into commercial enterprise. So she very much understood that bridge between these two worlds that can be quite different. And again, in the process of developing a strategic plan, we then had this agenda item at every board meeting with updates with consultation collaboration as required. So it was just a case of sort of keeping the board fully informed, alerting them when they needed to be alerted. Never alarming them, there was no need for that at any any stage. And then to me a fantastic strategy lands. And people go, yep, makes sense. No surprises. So it means your process to getting this right. And it means the way that the works been conducted and delivered is correct. So it's like that beautiful moment. Again, in my commercial world, where we deliver, we do a brand reveal to an organisation along with the brand strategy. And everyone just sits there and nods, and hopefully gets excited. But if I get a nod, I'm like, great. It landed, it landed exactly the way that we anticipated it would because the process to get there is right, the insights are right, the work is right, the rig is there. So I guess in that respect, we didn't have any moments where we had to debate this strength of the voice. It was more about validating where we saw the vision being in 2024, because it is a big, hairy, audacious vision, it is not going to be delivered in 2024. So it really again, were the way that we were articulating success around what we were hoping to hear from victims survivors in 2024. Did that mean we'd stepped further along the path because we knew we weren't going to be having a celebration in 24 that, you know, domestic and family violence have disappeared from our communities, you know that that would have been a horrendously unrealistic? So yeah, so that's a good question. But I just thinking through it, there was just never a moment where it didn't make absolute sense. I guess my surprise was just at the genius way the leadership team came up with reflecting it in a bolt standard strap planning framework, any strategist uses them, they're not in themselves anything that's, you know, the definitely not rocket science. But it's the way they used and I think it was the way they reframed it and the intelligence that was put into it. It was just stunning. And that was the bit It surprised me.

Helga Svendsen 22:47

Oh, fantastic. I'll, I'll make sure we have a link to the strategic plan, oh, actually, I should check. Is your strategic plan a public document?

Melissa Donnelly 22:54

Yeah. So the strategic plan for DPVC is publicly available, and I can absolutely give you a link to share with your listeners. So yes, I would welcome them having having a look at it.

Helga Svendsen 23:05

Well, exactly. You get to showcase, you know, part of your proudest moment, we can also share with the take on board community, but it's it is always good to have a look at the way different organisations are doing it. Although like you have just done I caution people in a way that it's not actually the finished product that is important in strategic planning. It is the process that you take along the way. And then conversations that you have along the way. So that at the end, it is just a high. Yeah, that's right. So yeah, but if that would be great if we could share it. But yeah, absolutely.

Melissa Donnelly 23:37

Absolutely. You know, and I think of other examples, again, more consulting with boards and advising to boards. It's been a similar thing in that it's that process and the steps leading into the plan delivery, and then the processes and steps coming out of the plan delivery to implementation. And again, what I've realized is that it just gives us this perfect platform to continually be going back to our staff and to our customers and clients and members and look at another board that I advise last year and this was a commercial company in the financial services sector. So they'd had a private equity house acquire a majority stake in the business. So we were using that as an opportunity to revalidate the brand and the strategic plan of the organisation. And again, one of the things we pushed heavily for was for this for new members of the board to hear the voices of customers as part of that process, because a lot of them were coming in you and they were coming in hot and they had their own opinions. And you know, we said to them, if we're going to put rigor under this process of validating, again, this brand that you've acquired, you need to hear from customers, you know, and we spoke to this particular customer community every two to three years if we could. So we had again 10 years of data that we could go back to and insights and qualitative and quantitative conversations with customer, base and staff. And what it meant was that we could induct the board quickly into the position that we're in now, the future state we wanted to get to, and we could shift the needle very, very quickly without losing sight of customers that the organisation was there to serve. So, yeah, so it is it's very much about that process in the lead in, drop the strategic plan, and then the process coming out of it.

Helga Svendsen 25:28

Melissa, what are the key points you want people to take away from the conversation that we've had today?



Melissa Donnelly 25:33

I think firstly, and again, it won't be news to anyone sitting on boards, but we do play a really vital role as a catalyst for organisations to either define or rethink or just articulate their vision, their Northstar and their values. And again, strategic planning process is the perfect frame to do that through. These are the foundation conversations that you have when you kickstart strategic planning. And I think the onus is really on us to make it happen. And I think if we don't, organisations are weakened in two ways. I think one, you've got staff, customers, shareholders, investors who don't know what you stand for, I mean, this statistic that I just keep coming up against, and you nod your head and go, yeah, it makes sense. But it's not a good statistic is that 95% of staff do not know, the strategic plan of the organisation, they work for 95%. So as a board, we can't let that slide because they don't know what you stand for. They don't know the problem we solve, they don't know why they should care. And if they don't care, they're not going to engage with customers, they're not going to advocate for the brand. And again, in a mission critical for purpose environment, that can be hugely detrimental, you can have organisations getting torn apart from the inside that are there to serve a vulnerable community. So I think that's one point is having everybody on the journey and having it fully transparent. And then I think the second part of it is, if there is no mechanism for it, the customer just isn't at the table when critical decisions are being made. Again, either physically or metaphorically. So great strategic plans, put the customer at the center of the business. And again, you convert them from customers to loyalists to advocates, your business is going to or organisation is going to scale in whatever way it should be scaling. It's going to be scaling incrementally. Rather than having it as an agenda item, have it as an action item, put some resources and focus in and get it happening. And if you don't have the capability inside the board, you'll find somebody with it. But it is really important. And again, I think we're missing a trick by not having it and I think we don't have it in too many instances. So yeah, so that's probably the two takeouts I would advocate for.

Helga Svendsen 27:47

And is there a resource you would like to share with the tech on board community?

Melissa Donnelly 27:51

I do have resources. But I just thought for something a bit different rather than a link being somewhere and everybody thinking about it at some stage another I am going to run eight questions through listeners right now. And everyone can sit and just go yes, no. And you should do it. I think everybody should do this one. And so this is kind of the diagnostic that I would normally share. And I'm happy to later but I think we should just have some fun and do it now. So I'm just going to ask eight questions, and it is literally yes, no, there are no maybes, it's got to be yes, no. But the first question is, is your board clear on your organisation's objectives? And where you need to be in say, one to three years? Yes, no. Secondly, is the organisation's leadership team clear on your objectives? And how you plan to reach your Northstar? Are you frustrated with your organisation's ability to achieve these ambitions? Question four is do you have a documented strategic plan? Has it

been communicated to staff? Question Six is do you have a brand and communication system in place that empowers your staff and customers to be your most powerful advocates? Question seven, do you know who your customer actually is? What problem is solved for them and how you do it better than anyone else? And the last one is your organisation's customer physically present and their voice is present in your board meetings? That's a yes no. So have a quick look at yes knows if you've got five or more than you've probably be just been bored senseless for the last half an hour. If you're looking at more no's than yeses, as I said before, get strategic planning off the backburner? Because they are all related to strategic planning and get some resources and focus behind it. And then I would always say once that plan is published, and it is a long process. I do get that. But remember that strategy without execution is pure fantasy, as we all know. So again, thinking about as board member What's your role and capability in equipping the CEO and leadership team to implement the plan? So there we go. So that's just a little quick diagnostic. A bit of fun.

Helga Svendsen 30:11

Awesome set of questions. It's got me thinking about a few things as well. So that is fabulous. Oh, thank you, Melissa. It's so fantastic for you to be able to share the story of DVPC and how to bring lived experience into the boardroom. I know that people listening today will no matter where they are on the Yes, No scale there. I suspect everybody will be able to take something away from the conversation. So thank you for sharing your wisdom with the take on board community today.

Melissa Donnelly 30:36

My absolute pleasure.

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