

Learning Uncut Episode 107
Supporting Work Teams – Katrina Moss
Hosted by Michelle Ockers



Michelle Ockers:

Katrina Moss from Shopify was our guest in episode 64 in October 2020, almost two years ago. She has returned to update us on the embedding of growth mindset in practices across the organisation, including as a key foundation for learning. One exciting new development in the work of L&D at Shopify is to support the effectiveness of work teams. The organisation is now digital by design, with teams spending very little time physically together. They are being very deliberate in ensuring that teams have a small number of well-designed gatherings each year that build trust, connection, and overall team effectiveness. Katrina walks us through how this body of work has built and the three-tier service offering from L&D to support work teams. There are some great resources in the show notes for you to explore, including one that Katrina mentioned after we had stopped recording – it's a book called *An Everyone Culture* by Robert Keegan, which has been instrumental to fuel Katrina's curiosity about how her organisation operates.

Michelle Ockers:

Welcome back to Learning Uncut, Katrina.

Katrina Moss:

Thank you, Michelle. Appreciate that.

Michelle Ockers:

It's been almost two years, October 2020, your first conversation with Learning Uncut was published, episode 64, which was all about adopting growth mindset in your organisation, Shopify. For those who maybe haven't listened, they can jump right in and listen to this episode, but they may want to go back and recap episode 64. Let's start by an introduction to Shopify, because not everyone will have listened to that episode, Katrina. So an introduction to the organisation and your role.

Katrina Moss:

Sure. Well, you can understand Shopify as a platform that supports entrepreneurship, and the way that we do that is largely through our software that enables our merchants, folks who decide to create and to be entrepreneurs. It allows them to sell their products and to do so... and engage with customers in a multi-channel. So that would mean they could have a brick-and-mortar store, they could also have an e-commerce website and engage in everything in between, including pop-ups and flash sales and things in order to get their products in front of customers. And then one of the most powerful things about our product is the back-end administrative functions that we allow for our entrepreneurs. Basically, means we give those folks economy of scale so that they don't have to have all of that admin for themselves, and they can intelligently know what their customers might need so they can offer them the right things.

Michelle Ockers:

That's fantastic. All of that heads up in terms... As a small business owner myself, all of that heads up in terms of administration and cost and effort, so it's great that you have that. You're headquartered in Canada, is that right?

Katrina Moss:

That's right, yes.

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Michelle Ockers:

And operate globally?

Katrina Moss:

Absolutely, yes.

Michelle Ockers:

Wonderful. So we spoke about the concept of growth mindset, and you mentioned that you came across it at Shopify when you see... You mentioned it in several fireside chats, and it resonated with your personal experience growing up with dyslexia. But you also saw expressions of it in practices across the organisation, and you advocated for it based on the expressions of it in practice in the organisation to become an organisational value, which is expressed as be a constant learner. I think you spoke about experimenting with it, with onboarding, then introducing it into leadership development, and also you advocated for its adoption in talent management. So I'm curious about what's happened in the past two years with the growth mindset and its use at Shopify.

Katrina Moss:

A lot of those spaces that were true two years ago in terms of where we reinforce growth mindset is still true today. So when individuals join Shopify, they still experience what we now call start-up, which is their onboarding experience, mirroring some of that idea of being an entrepreneur, so starting up with Shopify. And one of the components of our content that we deliver is talking about how you can be successful at Shopify, how to make an impact in our environment. One of the key pillars of that being to align with the value of being a constant learner and to embrace a growth mindset. So we normalise that, we talk about that, we reinforce that, right in the instance of having folks join. And then we actually look for it in our hiring practices as well, so there's many reinforcing loops for that to be... Essentially trying to cultivate a group of people who orient that way naturally or by their own efforts. But then reinforcing and creating the conditions in the actual work environment for that to be an ongoing area that they can expect.

So in our leadership development, we also expect our leaders to create the conditions for learning to happen on their team. And that looks like a lot of reinforcement for being able to put your team members into opportunities that stretch them. So having an appetite for risk through the lens of giving individuals projects that are potentially just on the edge of their capability, but with the right support and then the right mechanisms for a leader to give them feedback and peers to give feedback, that person actually is able to achieve that goal and has more skills to apply to the next challenge. So it's in the environment that we create, it's in the norms of how we expect leaders to stretch their teams, but then it's also in the type of psychological safety that we reinforce for leaders to create in their gatherings. So we can talk a little bit about that too, because being a digital by design company, we have some cool things that we've done when we actually do bring people together in terms of reinforcing growth mindset.

Michelle Ockers:

Yeah, I think that would be great to talk about. When we think about leadership development, it's one thing to run people through a leadership development program and talk about how to support people through stretch assignments, how to develop people, and then people are back in the workplace. And we expect a lot, I think, particularly of our frontline leaders these days. They're often in extraordinarily busy environments, and I'm not sure what Shopify looks like, but many of the organisations I work with and people I speak to have never been busier than they are right now. It seems to be a very hectic environment. So when people are back in the workplace, when leaders are back in the workplace, despite the best of intentions, it can be difficult to create an environment or

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for them to operate in an environment where they can take all the principles and practices they've learned about on a development program and actually apply them. So how do you... Given... You're in learning and development, you've got a certain remit, so this isn't something you can do on your own, how do you go about as an organisation creating an environment where leaders truly are able to sustain? Developing their people, adopting a growth mindset, creating psychological safety. What does that look like for your organisation?

Katrina Moss:

Yeah, I think the best way to answer that is to go back a little bit and to talk about how... One of the things that's happened over the last couple of years is we've really transformed the role of the trainers on our teams to be facilitators and experienced designers with teams and with leaders. And so the reason I think that's very relevant is because it's allowed us as a team to actually partner with leaders when they're planning any type of gathering. And so what that means in the terms of our environment is that we work remotely by design, the majority of the time, but we do encourage teams approximately twice a year, there might be some variation to get together in real life and have really well-designed, thoughtful, engaging experiences as a team in order to elevate trust and connection, but also to elevate the quality of the work that they're engaged in.

And so as a team, what we've done is we've positioned ourselves as the partner to allow a leader in a team to have the most effective gatherings through our facilitation services and through our experience design consultation. And so in real time, what that looks like is, imagine a leader knows that they're due to bring their team together. They haven't done so in several months, they have maybe a couple of new members, they might have new direction, to your point, it is busier than ever, they have many priorities to address, so they can work with us to identify the most high leverage design for their experience so that they can effectively get to those bigger aims that they have as a group. Higher trust, deeper understanding of priorities together, and ultimately come out of that experience as a higher impact team.

And so what we do is we advise on... Based on doing this for the last year-and-a-half, we've gained some collective insight on what teams tend to need at different stages in their team cycle, whether they're newly formed, whether they're established, perhaps, all of those different scenarios that could play over a team. And then we basically got smarter over time to understand the common pain points so that we can advise them on how they might wanna spend their time together. And what's really exciting, Michelle, is we're going to be on that now and we're looking at the async, so basically the time when they're working remotely together and the async rituals they can engage in or tools that reinforce the things they experienced in the gathering. 'Cause we all know, to your point, we can get together, have a learning experience and then go back into our work and lose sight of it.

So what we're trying to do is get as close to the leader and the team to their needs to reduce some of the friction and the load that they have to carry so they can effectively have experiences as a team and then have that reinforced. And what that allows for as well is it allows the leader to learn about what we do to buy in to want to spend more time in their development going forward. So we notice that once we have an experience with them, they almost always come back as a repeat for something else. And then we can make recommendations for their ongoing development. Things like engaging in a cohort where they can learn from peers on a particular topic for their own growth, because now they're bought in and they can see the value.

Michelle Ockers:

It builds the relationship and the trust, right?

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Katrina Moss:

It does, as real partners and as people who actively are the guide on the side they own the outcomes of their experiences, but we guide them based on what we know is working and not working for teams and leaders to be as effective as possible.

Michelle Ockers:

So can you give me an example? You spoke about you're developing a fairly solid understanding now of common pain points for teams and ways of facilitating through that to support a better outcome. Can you give me an example of a common pain point and what the facilitation might look like to support the team to address that pain point?

Katrina Moss:

Yes, absolutely. When we see often is a team will... A leader will ask for our support for a particular gathering that they have in mind, and then once we have a consultation with them and understand what's happening, we learn that they are missing some critical foundations for the team to be effective. Foundations like having a mission or a clear purpose, having the sense of priorities and how they establish priorities as a team. And then even through the perspective of getting to know each other and having the sense of psychological safety. Do they even know enough about each other to know what someone's likely to default to under stress, or whether someone's likely to take on more work in those scenarios or someone may be rejected.

So just by actually helping them understand the foundations that they might be missing and then making a recommendation for how they go through that journey to establish those foundations, that has been hugely impactful, because then teams know that they can weather a lot more ambiguity, they are more resilient together by establishing those. And it's actually been interesting to learn and you don't do those things, because they are, to your point, always trying to get ahead of whatever works in front of them. And what we are is the voice of reason and guidance and support on how they can actually cultivate those foundations that will be steady for them no matter what shifting priorities occur.

Michelle Ockers:

How did you think it started with this work? Was this something that you kind of... Not quite stumbled across, but was it a serendipitous thing when an opportunity came up and you did something and thought, "Oh, we should do more of that?" Was it very deliberate? How did it all start?

Katrina Moss:

Yeah, it largely started because before the pandemic, we used to spend a lot of our time as an organisation being together in office environments, and then occasionally, a team would want a change of scenery or a change of context and go and do an off-site. So offsite is the terminology we're... I think, we're more familiar with across different companies. And then when the pandemic hit and we defaulted all to a remote experience, we started with an idea of a home site, which is, essentially, you're still coming out of your day-to-day routine to come together as a team, you are at home, but we are providing a container for the group to actually talk about what's happening, work on goals they may have together, cultivate some trust.

So a couple of members of our team did work essentially on the side of their desk recognising there was a need, offering it as a service, and then as we started to realise how important that was as a function of teams being healthy, we started to invest a little bit more of our time as a team on services. So what we call, what we offer is our learning consulting studio, and it began as a start-up within the start-up essentially, so within our existing model where traditionally, we offer programs that are much larger scale leadership development programming, onboarding programming, for instance, those are still

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very important things that we offer, but this was responding to the more ongoing and responsive team and leader-needs that were emerging so that we could understand those and we could offer some support for those.

Michelle Ockers:

Okay. Are you also an OD team or not?

Katrina Moss:

We don't have that as a structure that we define, but I would say yes. I'd say based on the way we think about organisational development...

Michelle Ockers:

Yeah.

Katrina Moss:

Yeah, I do think that's an area that we support.

Michelle Ockers:

Yep. In bigger organisations, I often see a challenge defining the boundaries between the work of OD and the work of learning and development, and this is the kind of work you're getting involved in, and I think it's perfect work for L&D, for all sorts of reasons, but it's often work that is within the realms of the OD team. But I think there's a legitimate role for L&D to play in there as well around facilitation techniques. In terms of your team scaling up, I'm not sure what their initial level of facilitation was, what experience they've had with this kind of work and whether it was new and they had to scale up in it. What did that like in terms of growing the right skills and the confidence and comfort to do this kind of work for the team?

Katrina Moss:

Yeah, that's a really important question, and it was a huge curve for a lot of folks. And what I think led to a lot of the success of those individuals is that they didn't have a lot of previous experience as trainers, ironically, because what I thought might be the case is the more deep expertise you have in a particular way, the more likely you could have a hard time adapting and adjusting to a new way. So when we hired for the amount of people we thought we'd need for this first version of our team leaning into services, we actually hired from a bunch of different areas of the business. We hired from our support advisor role, which is a role that supports our merchants, it's a frontline facing, very complex, a lot of problem-solving and a lot of consultation skill. So that was really transferable, and then we hired from some of our merchant success areas, which is more of the... Once we have a group of merchants that we know need support, that person provides ongoing insight and guides them in what they might need for success. So you could kind of pull from different pockets of the business based on some of the transferable skills.

And of course, had to augment it with a lot of purposeful development, ongoing development. So at the time, we didn't have an in-house facilitation development program, which we've since been building out. So I was able to partner with some external folks that I... One in particular that I know and trust that we've been able to learn a lot from, and they were able to provide us with some of that professional development to help them feel more confident and more comfortable supporting the work. But honestly, it's an ongoing journey, because this is the type of work where the stakes just keep raising. So you maybe master some kind of facilitation experience for a team, but then asked to lean into an even higher stake scenario, and that's one of the ways that it's been helpful for us is to define it based on how high the stakes are and ultimately how complex the app, and then to support the team and those case-by-case scenarios.

Michelle Ockers:

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Yep, yep. And do you work... So you develop a relationship with a leader in their team. Is there a partnering arrangement where there's a certain person in your team who continues to work with them, or is there more flexibility in who's working with different work teams at different times?

Katrina Moss:

It's a bit of both, because if someone works with a member of our team in it and really has a lot of respect and trust generated with them through the engagement, it's very likely for them to ask for them by name again. And so when we can, when there's capacity to do that, then we're happy to support that request. But we also... It's a bit of both 'cause we also want the cross-training, cross-learning experience for the rest of the team, so we allow for that so long as it's not as rigid model. So we don't have facilitators specifically allocated to certain business units, for instance.

Michelle Ockers:

Right, right. So what are the keys to success with this kind of work?

Katrina Moss:

Well, there's the layer of... I suppose you can put that in a few different spaces. One of them is our growth of our services has been exponential, which is a signal of the impact of the work. So the amount of repeat demand is in itself a measure of success. We set up very high service standards from the onset, things like response time being within 48 hours, absolutely, we would engage with whomever asked our support and work with them and have a really fulsome intake to understand their needs within 48 hours. So we set standards from the beginning that were high. That's been hard. We've definitely been stretched to them, but the type of feedback that we're getting from teams to engage with us, our feedback scores are always within perfect. It's always 4.7 of five and those types of ratings. So we know that's the lowest. We know that we are consistently meeting or exceeding their expectations. That's a big signal. But I think the broader, always wanting to measure from the lens of business effectiveness and whether we're supporting those things, we've partnered a lot more closely with other teams that are responsible for different components of the programs that we support.

So for instance, there's a team that specifically services our bursts, which are, in real-life, gatherings at Shopify. So they are called Burst 'agency and their role is to ensure that when a leader does engage in a burst with their team, that they know exactly what the guardrails are to do that successfully, they know how to successfully plan, they know how to leverage our services, should they chose to, they know how to set up their team's expectations clearly. And so that team collects the feedback from an aggregate view on how the burst experience was, and we gather insight from their feedback mechanisms to understand how we're doing in particular. And that's based on a principle of not wanting to have survey fatigue, our leaders...

Michelle Ockers:

Absolutely.

Katrina Moss:

And have many disjointed ways of asking them how we're doing, which is a challenge, but we've been able to do that. So yeah, so we know we're being effective because we have a huge demand for our services, because we're allowing programs that are foundational to our culture, more successful with our support, and ultimately because we can start measuring, now that we have a bit of a baseline of what teams repeatedly need, we can start measuring over time, the change that we would see in their effectiveness. So that's the work that we're getting into now is establishing more of a baseline to see the difference in working with us over several months.

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Michelle Ockers:

How do you measure team effectiveness?

Katrina Moss:

We're defining that exactly right now. So yeah, so that's a great question. I think if we really boil it down, is every individual on the team positioned properly with the context they need to optimally do their work? So as individuals are they the most effective and impactful as possible? And then have we combined them in such a way that they allow for more things to be accomplished together than they could apart. So there's a measure of aggregate outputs being higher as a team than as individuals, I believe, and then the leader, also having high incidences of being perceived as a leader that guides the team effectively that aligns with our values, that aligns with the things that we believe in and gets the work done, is able to achieve.

So for leadership, we talk about aiming, assembling and achieving as a framework for success for our leaders, and so we're beginning to look at how we can measure that over time as well and see that through the work we're doing, they're better at aiming, assembling and achieving.

Michelle Ockers:

So if you think about this work, supporting work, team effectiveness is kind of the goal, if you like. Your team is coming in and facilitating these gatherings. Who else is involved? Or how far does your work extend? And do you become a coach to the team leader? Are there other parts of the business who have a part to play in this? It kind of... It takes a village, right? It's not just one team working twice a year with their leader and their team. There's more to it than that. What does that look like in terms of who else is involved?

Katrina Moss:

Absolutely. So our coaching team is involved. So what that tends to look like is in the intake experience, when we understand and assess what a leader is looking for and what they're needing. We have some questions that help us determine if a coaching intervention is needed. So we might understand through that intake that the team is going through a high amount of conflict, for instance, or there might be some trust challenges that they're experiencing.

If we notice that there are problems with how they're able to healthy function together and we do believe that it's past the realm of a facilitator to support, then we tap in our coaches and our coaches come and support. And so they'll do it from the lens of bringing a team to health and guiding a team towards a more healthy functioning, but they also offer something proactively, which is what we call our Enneagram session. So we leverage the Enneagram model across our coaching team and they'll use that to help teams understand each other a little bit more deeply and understand the way that they look at their world view and the way that they consider doing work effectively so that the teams are better equipped if they run into challenges in the future, they can use that as a shared language to understand what might be happening. So our coaches, you can imagine them dropping into the engagement to offer a specific support.

And then at the same time, what I've just described is what we do to support teams in their workflow as they're getting their work done, but in terms of creating a village and ongoing development, then we also have our leadership development program, which we can then recommend for them, and that is a whole other set of members of our team that support those initiatives. And then we'd also have ongoing coaching. So if the coach discerns that it might be necessary for that leader to have ongoing coaching and development or team-based coaching on an ongoing basis, they can offer that service.

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Michelle Ockers:

Right. The big shifts in response to, or it's almost like there's an opportunity created because it was probably always value in doing something like this, but the digital first or digital by design approach now has highlighted the need, not just in Shopify, but in many organisations, for additional support to be provided to leaders and their teams to navigate and figure out how to work in this different way in relation to each other. It's a really nice model that you've adopted and it's interesting, the... One of the capability frameworks I work with learning and development teams is the Learning and Performance Institute framework, the LPI framework, and it has a competency in there called support work teams, and it is difficult to point L&D teams to real working examples of what that might look like and how they might embrace that in their work. So thank you for providing such a fantastic example of what that could look like and how far you can stretch the engagement involvement to support work teams. I know when we were talking before we started recording, we were talking about growth mindset in the context of the last couple of years.

Michelle Ockers:

And this is a particular expression of how you've supported work teams during the period of the pandemic and all of the adjustments to how we work together. You mentioned this idea that there's this collective state of anxiety in the world.

Katrina Moss:

Yeah.

Michelle Ockers:

How do you see that playing out in the organisation? What indicators do you see that that's having an impact on how people show up, how people interact potentially, on how they engage with the organisation and what's the interplay with growth mindset?

Katrina Moss:

Yeah, so this I've certainly observed across our organisation. What I think is really interesting is when folks have constant ambiguity, and that's true for the world right now, for what we just went through together, going through a pandemic, and of course that that's not done, there's new things to consider. And so folks are on edge. I think it's a fair statement to say that a lot of individuals have a heightened sense of stress and anxiety about things they used to think were stable and not a concern. And so they just have a lot more to think about and to be concerned about than they might have a couple of years ago. I mean, the layer in things that are happening in the world on a global scale, and there's quite a lot that you could concern yourself with if you were oriented to do that as a default. And I think we all are if we're not very mindful and have some really good practices to ground us.

And so I think the impact it has on learning is that when folks are in a heightened state of stress, not the type of stress that peaks for a moment, and then that surge allows you to be motivated to do the work and to move forward, but that chronic ongoing sense of something doesn't feel right or feel safe for me from a psychological perspective. So I don't think Shopify is anywhere near immune to that reality. I think we see that in how our individuals within the company are experiencing their days. And because they're working in a digital context, they're working at home, so there is an interconnectedness with their whole life experience and what they do when they work.

So having said that, from a neuroscience perspective, we know that if someone is always stressed or chronically stressed, they can't really access that parasympathetic nervous system, that part that says, "It's okay. I'm calm. I can make a decision. I can clearly see the opportunities ahead of me." And that has a direct impact on someone's ability to engage in a growth mindset. We know that if someone is in a state of constant

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stress, they can't effectively grow and learn as much as if they were in a more calm state of mind. So how do we know that that's happening? I mean we can discern it, we can assume it from the world, and a lot of things happening fairly safely, but some signals that we've noticed is on our team and across the coaching team as well. We offer safe spaces through the lens of, you come to our team, you engage in our experiences for the purpose of learning how to do something or to be with peers to learn together, and we offer a specific session called an Energy Management session, and we've been offering that, recognising that individuals are probably looking for some help right now, some additional tools, some additional supports in terms of navigating their energy. And it's by design, energy management, not stress management, we don't wanna assume when someone's stressed out, we give them a model to think about what areas are you feeling the most taxed and having the hardest time, so you can actually decide what kind of things you might wanna do to improve that situation.

And then we also offer some universally useful techniques like breathing, some of the things that allow people to calm down and access that parasympathetic system. So what we're noticing is how much demand there is for that. We offered it to test whether or not people would find that useful, and it's just been constantly week over week, the leaders on my team saying, "We need to offer more, more asking for this, more looking for help."

So we have a lot of strong signals telling us right now that people are in a high state of stress and having challenges managing their energy. And if we can support that through these tools, through these types of sessions, through these async means, like things they can do on their own, then the aim over time would be that they are collectively a little bit more calm, a little bit more grounded, and then can re-engage in their ongoing development, in the harder stuff, the stuff that causes them to question their default thinking, their choices they've made up to now and what was effective and what was not, so that they can continue to grow and develop more skills. So that's been really important, is just being attuned to that and to recognise that that's not... In my view, that's not a nice-to-have. That's like a critical skill and support system right now for organisations because they are... People are having a hard time.

Michelle Ockers:

I think one of the things that has happened is we've normalised a conversation around that, that the ambiguity and the recognition that this is a universal experience has allowed us to normalise it and forced us in a way from an organisation perspective to say this is something we must provide support around, that this is critical to the effectiveness of the organisation, not just something that's soft, if you like, and an option.

Katrina Moss:

Right.

Michelle Ockers:

Do you offer that live? Obviously, it's online because of the digital by design nature of the organisation, but they are live-facilitated sessions?

Katrina Moss:

That's right, yes, and in all time zones. Because we do operate globally, so we offer them across all time zones.

Michelle Ockers:

Yeah. How do you discern or decide when to offer things live versus self-paced?

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Katrina Moss: That's a great question. Typically with something where... One of the things that helps guide us is whether we think there'll be more benefit from doing it with other people versus alone. So if the need is as close to what it'll look like... Let me just explain this. Okay. If we know that what good looks like for them as a result of what they're going to learn is fairly predictable, repeatable and can be accessed through an aid, then we will provide an aid and we'll leave it at that.

If the thing they need to cultivate is perhaps a change in thinking, a different perspective in order to engage in the tool or the practice, and if we think that they'll learn more from each other through talking through the experience they're in, then we'll want to lean towards a synchronised experience.

Michelle Ockers:

That makes a lot of sense. Unfortunately, one of the things that we see too often is the economic criteria and scale being a driver of the decision, and let's just put digital assets out there, or let's just make content available that people can self-help to because it's cheap and we can scale that way rather than starting from the perspective of what's the real learning need and what's best going to support people, which of course, might mean more investment. And obviously, you've grown the team in order to provide the service of facilitating the team engagement. In terms of making the case for change or making the case for investment, how have you gone about that? 'Cause the team has grown over the last two years, by the sound of it?

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Katrina Moss:

Absolutely, yes. Yeah, so how do we make the case for that growth, basically, we do engage across Shopify an exercise called Investment Planning, and so the way that we do that from the lens of learning and development is it's a leg plan based on what we know, our gross rejections are for the roles that support our merchants front-facing and through our R&D functions. So part of how we make the case is through pure growth of the organization and then through ratio planning, so knowing the number of individuals in the organization, we're going to need these additional folks to help keep the lights on, just to keep the things that we're currently doing, functioning, and we're always aiming for finding out how we can make those optimized, so if we're challenged by better tools, for instance, that's what we look at and our investment plans as well, but that's one way that we do it this past year.

What we built in our investment plan was to keep the lights on growth that would be required to mirror the growth planning in the organization, but then also, we pitched the benefit service offerings to support actually being in gatherings with leaders and teams deliberately because that's a service that was new, that we had only just tested for about six months before we got into our investment planning really formally, but we were able to build enough data in that time, enough return on investment with the people that I need to influence with my leaders to see and stakeholders to see that it was a worthwhile investment for us to engage in further, and one of the key rationale for me to make was that we wanted to remove the frictions for teams to gather effectively, that we wanted that to be something that if we're going to invest that heavily in teams getting together, those better be the most impactful, engaging, accelerant experiences that they could offer, knowing that they're precious, it's a couple of times a year.

Bring people together, let's make sure that those are really, really incredible. And one of the ways we do that is to make sure those leaders and teams are stood up for success from an experience design and from a facilitating those experiences perspective. But I will tell you that we don't go to all of them, we can't... There's far too many, so we've had to do a lot of decision-making criteria and re-evaluating those decisions to see exactly when are we best... High leverage to go. And then what we've built over time a tiered service to help address that need, so in our most robust version, we are doing the experience design with the team and leader, we are actually with them present in the engagement, we're delivering the experience, we're following up with them after and perhaps even offering some other supplemental things for them based on what we learn, they need.

So the other tier of service that we offer is consultation and then curation, so for that tier of service, we meet with the team, the leader, we understand their need, we do a fulsome intake, and then we make recommendations to something that we call our gathering playbook, that's a great resource we've built over time for leaders to engage with, but we offer that customized bespoke type experience of saying, "I understand your needs, understand your AMS, let me offer you some experience design for you to be able to do this yourselves with your teams," and then we also provide them with some facilitation techniques based on what we think they're going to be most challenged by, and so for some leaders, it might be things like hearing from everyone in the room equally, so we'll look for what they might be most challenged by in leading that themselves. And we've built some facilitation resources for them to grow their own capabilities, so that's our second-tier year, and then our third tier, we're building out right now more intensely is having an external vendor roster, so that when we know we just... We are at max, and we've assessed that they don't necessarily need us for the full engagement, but would still benefit from a facilitator, then we can make a recommendation in their area that we've vetted for quality that we feel confident in, so they can get that support.

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And then we'll couple that with ensuring those external vendors are aligned with us from a content and cultural perspective, so that it feels as seamless as possible without us being able to engage fully so that...

Michelle Ockers:

The full service offering that you're working out there over time and how you start with a one point and then you grow from there, the gathering playbook, interest me, it makes me think about the Atlassian team playbook, which of course, you're nodding your head, people can say you're nodding your head, you're familiar with that, which is a great little resource that they make freely available online, and I'll pop a link to that in the show notes, where have you gathered your place from... Have you curated them from elsewhere, have you created some yourself? How you created that gathering playbook.

Katrina Moss:

Yeah, and I love Atlassian plays, that is something that has inspired us and that we have leveraged for our own different team activities, so it's a mix, some... We have absolutely created in-house based on very unique needs that we're receiving from the business, for instance, for investment planning, a lot of what we're creating right now is things that we've had to build in response to how our organization actually strategically plan and forecast the needs for the future. But there's certainly a lot of amazing content out there, we leverage a lot of Liberating Structures.

Michelle Ockers:

I was going to ask you about Liberating Structures. I'll pop that in the show notes as well. They have some great facilitation approaches.

Katrina Moss:

Absolutely, and I'm a big believer in not reinventing the wheel when it's already... When something's well done, I believe in us contextualising it for the team and the leaders, so they know how to leverage it, but I don't think there's a lot of value in having to recreate something, so I really do... It's curation with any curation, really, 'cause we are pulling it together and then we're picking the pieces of everything the leader most needs.

Michelle Ockers:

Yeah. Do you find most leaders have the skills and are comfortable and confidence enough to be able to use the play to self-facilitate or is the answer was, "Well, it depends on the team, the environment, the issues they're facing."

Katrina Moss:

Oh yes. It absolutely depends. It really does, in fact, I think that one of the challenges we face with that middle tier with the consultation is sorting through how we can help that leader build their confidence, because it's not necessarily a lack of tools or a lack of guidance on what to do, if they're really feeling like they can handle it in the moment, they can take on the unknown, because a lot of facilitation is truly the, "I will create the container and we will see what happens," leaders are good at that in some contexts, but when it comes to supporting their team, they can over-think and get pretty stressed about that. So we're still working on how to unlock more of that confidence.

Michelle Ockers:

Part of the challenge too is they're part of the dynamic, correct? They're not outside of the dynamic that's at play.

Katrina Moss:

100%, and that is one of the decision criteria that we use to help us guide whether or not we would engage fully is if the leader truly needs an objective third party

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for the aims that they're setting, if they know that them contributing actually dilutes or impacts negatively the experience they're aiming for, that helps us decide and inform whether or not we would step in and support them.

Michelle Ockers:

So Katrina, by way of wrapping up, we'd have some people listening to this episode thinking. "I am really interested in exploring this further, how do I get started?" What advice would you give either an L&D or an OD professional, but particularly in L&D professional, I think because this is outside of our traditional work, who's interested in doing more to support work teams? Where should they start? What would you suggest to them?

Katrina Moss:

Well, I think sometimes we forget that we ourselves are part of teams, and so we do have some awareness of what goes on, what the needs are, and sometimes I find in L&D, we're always looking for other people to give us an instance, what's needed. I think sometimes just having a bit of bold confidence to make a claim on what you think is needed, leveraging the insights that you do have, L&D folks, our leaders too, they are potentially members of teams and leading teams. So I think you can start by what do you actually know about your current organization and how effective a team... How can a team operate effectively in your environment and then use that to test a couple of things, try a couple of services, and figure out how going to create some standards for what good looks like for that experiment, and then check out your return on investment on that experiment, and if it's going well, then you've got more of a case to then invest more resources. The particular things you do are going to absolutely depend on the performance gaps or the challenges that are happening in your organization, and what type of context or environment you're in so that you know, probably more than you think you do, I think is the main sentiment I can offer, and if you're not willing to try anything, you most certainly will say exactly as you are.

Michelle Ockers:

So I love the sentiment of experimenting and doing more from a test in one perspective. Start small, try something, see what happens and go from there, right?

Katrina Moss:

That's right.

Michelle Ockers:

So it's absolute pleasure having you back on the podcast, Katrina, thank you so much for sharing those insights and what a wonderful body of work to be able to share. Thank you.

Katrina Moss:

I really appreciate the privilege to share and for anything that comes out of my mouth, it's a representation of a whole lot of people and a whole lot of work, and I'm just very excited about what we're going to do next, I think we've got really important times for learning and development, especially just zooming up for a moment, we know that it's very difficult to bring in great talent, what we do is one of the biggest reasons people decide to go to different organizations, they wanna learn and grow, and we are absolutely in the right type of spotlight, I think now, collectively in L&D to really show strategically what we can do. So I'm very excited for that and happy to come back on in the future if you'd like Michelle, and we can talk about the next version of what's true.

Michelle Ockers:

I'll wait for that conversation, I'm already looking forward to it, Katrina, thank you.

Katrina Moss:

Yeah, my pleasure.

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About Learning Uncut

Learning Uncut are learning and development consultants that work with learning teams and/or business leaders to accelerate learning transformation. We specialise in supporting organisations to create or update their learning strategy, enhance their learning team's capabilities, align learning to business value, and implement modern learning approaches.

We are highly collaborative and pragmatic. We partner with organisations to align learning to their business needs, unleash continuous learning, and build capability to help them thrive.

Learn more about us [at our website](#).

About your host, Michelle Ockers



Michelle is the founder of Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*



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