

Oxford<sup>sm</sup>

Marketing Society  
Excellence Awards 2016

Category G: Employee Engagement

**OxfordSM**  
***'Becoming a truly values-led organisation'***

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# Executive Summary

(277 words)

Like most marketing consultants, we've always put 99% of our skills and energy into meeting the needs of our clients. Although proud of our growth and success, we were beginning to take each other for granted. And despite working extensively in healthcare and social marketing, we weren't focused enough on our own resilience.

This is the story of how we actually applied our consulting skills to our own business, in order to make sure we were fit for our own future.

## The challenge

OxfordSM has been operating for 25 years, working virtually (all consultants are home-based) and constantly expanding our team and the type and scale of work we undertake. Facing a competitive situation for the best staff, as well as the challenge of continuously winning great clients, we felt we needed to re-establish what we stood for. And then we faced a very sad situation – a colleague took her own life – which made us think deeply about mental health, resilience, and the need to support each other.

## What we did

- Reviewed and defined our values – what matters to us?
- Learned more about mental health and actively built up a resilience model
- Created a balanced set of measures of success for us and our clients

## The results

- Happy people
- Happy clients
- Happy accountants (the business grew)

## Why we should win

- It's unusual for consultants to use their skills on themselves!
- Co-creation of meaningful values – not just nice words
- Brave embracing of tough subject – a truly transformational experience for us all
- Robust commitment to measurement and response
- Recognition that our business is entirely about our people, and our people are all unique and irreplaceable

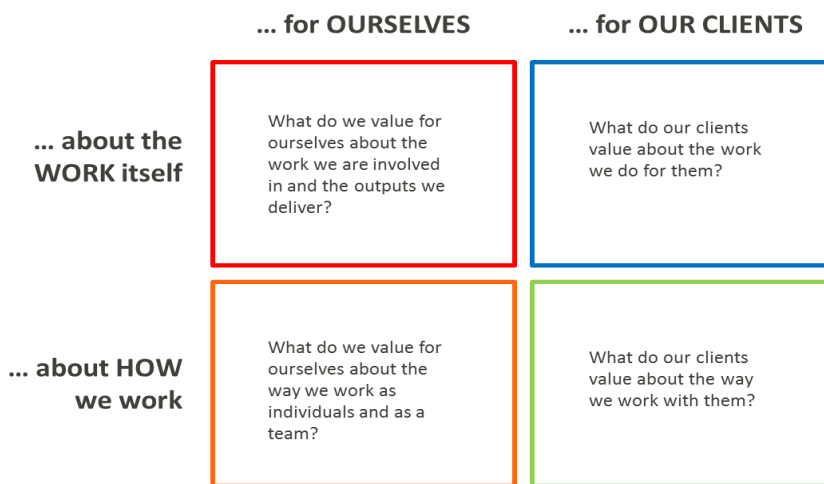
# 1. Where it began - 2013

2013 started at a sprint. It was our 25th year as a consulting business, and a period of rapid growth. Q1 2013 was our busiest ever quarter; we had new clients; new employees, new products. And this was on the back of several busy years – including, in 2010 we'd established our US office.

In consulting, your only true assets are your skilled and motivated people, and the positive and committed relationships you have with your clients. We believed that the engagement of our people would benefit significantly from a new focus on our organisation's values.

So we reviewed and re-developed our Values, from the sort of 'nice words' that everyone tends to have, to a meaningful framework that expressed what we really believed in, for both ourselves and our clients.

Being consultants, we developed a 4 box matrix that made us think hard about what truly mattered to us as an organisation:



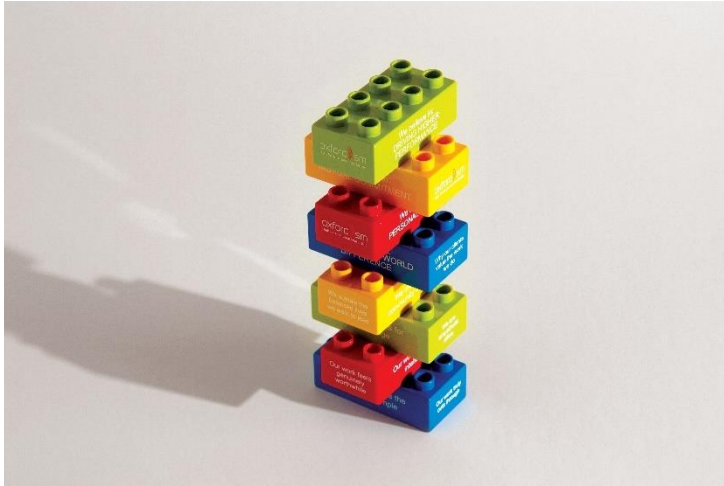
And then we worked as a team to develop the solution:



We knew that we needed to make them real, beyond words on a screen... So we made them into Lego!

(Lego are one of our clients, and it felt appropriate to have something real, tangible and tactile to remind us of how our business is built from our values...)

**A set for every desk in every home office...**



**And big ones in our Resource Centre meeting space!**



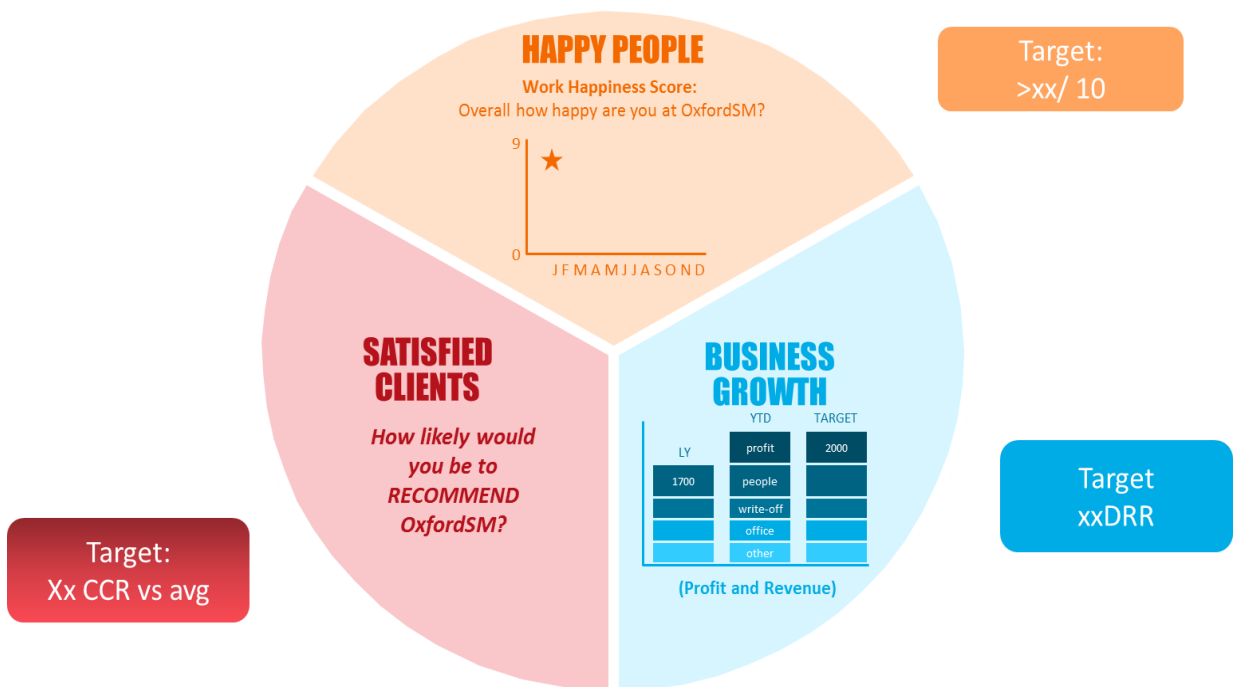
We believed this new expression of our values would give us a strong foundation for continued growth.

## 2. Goals and Measures

We also recognised the need to set clear goals and keep track of success.

So we introduced the 'Y front goals' – a jokey name that stuck!

The goals are simple, memorable and meaningful:



We developed simple methodologies for gathering each of these sets of data.

In May 2013 we did our first Happiness Survey amongst our own people – a single, simple question to the whole community (70+ people), with the opportunity to add comments. It was run independently (by Nisus) and reported anonymously, to encourage honest scores and meaningful feedback – this was a genuine effort at understanding, and we wanted the truth, warts and all! We committed to completing the survey 8-10 times per year, as a snapshot of current feeling, and an early warning of any tension or issues building.

*How do you feel  
about working at  
OxfordSM,  
currently?*

*1=very unhappy; 10=very happy*

We also ran our Values Survey amongst the same internal group. We had done a version of this since 2002, but it was now updated and became a priority to ensure the words were being translated into deeds.

### Values Questionnaire 2013

#### Key work / life needs

Q4. In your work with OxfordSM, how well are your work life needs being met?

#### Strengths and weaknesses

Q5. What do you like about working for Oxford Strategic Marketing?

Q6. What do you find hard about working for Oxford Strategic Marketing?

#### Living our values

Q7. How well do we meet our values FOR OURSELVES i.e. when working with and for each other?  
Personal growth

Q8. How well do we meet our values in terms of HOW WE WORK TOGETHER?  
Mutual Commitment

Q9. How well do we meet our values in terms of THE WORK WE DO FOR CLIENTS?  
Making a Real-World Difference

Q10. How well do we meet our values in terms of HOW WE WORK WITH OUR CLIENTS?  
Driving Higher Performance

Q11. Overall, how well do we meet our values?

#### KPI Monitor

Q12. How does it feel working for Oxford Strategic Marketing?

Q13. Have we improved over the last year?

#### Improvements in focus areas

Q14. Are there any specific initiatives or actions which have helped us to better live our values over the last year and/or have improved the company as a place to work?

Q15. What are the most important areas for us to focus on for the coming year for living our values and/or making OxfordSM a great place to work?

Q16. Why?

Q17. Any other comments you would like to make about working for Oxford Strategic Marketing?

*(summary of questions here – see attachment for full questionnaire)*



*"On a scale of 1 to 10, how likely is it that you would recommend OxfordSM to a friend or colleague?"*

In June 2013 we ran our first Referral Rating survey, a single, simple question to our clients.

The Referral Rating Survey is run independently (by the Client Relationship Consultancy) which enabled us to benchmark ourselves against a comparable group of consultancies.

<http://www.clientrelationship.com/>

Initial results for these measures showed a good start point, and evidence that our values were already being actively used in our ways of working – both internally within our virtual working teams, and externally with our clients.

**Happiness survey May 2013: 74 team responses, overall average 7.6 (vs target 7.5)**

**Values survey June/July 2013: (vs target of +0.5 on all measures)**

	Mean	No reply	Not at all met (-2)	Not very well met (-1)	Met (0)	Slightly exceeded (+1)	Well exceeded (+2)
Personal Growth	0.53	3	-	3	16	9	6
Mutual Commitment	0.86	1	-	1	13	12	10
Making a Real-World of difference	0.71	2	-	-	16	13	6
Driving Higher Performance	0.81	1	-	-	15	13	8

## Which specific initiatives have helped us to better live our values over the last year?

- "Evolution of planning meeting which has helped all realise our co dependency. Sharepoint finally "taking off" as a key tool to help each other." *BD*
- ████████ helped me to pay more attention to the values. She is constantly reminding us about them and encouraging us to talk and live them. More please! The lego is also a strong reminder on my desk. The happiness survey and y-fronts are also a great way to reinforce our values." *CD*
- "Focus on values at team meetings. Happiness survey, and 'y front' approach. More sharing and constructive support between teams. Pro bono charity work. Rejection of inappropriate client work. Focus on associates." *PD*
- "I like the way we are taking time to recognise 25 years - it is a heck of an achievement for a business this size to have been able to drive growth and maintain the sense of values." *Associate*
- "Continued flexibility in working hours and location (office/home)." *Admin & Production*

**TRR survey June 2013: 108 client responses, overall average 8.0 (vs Consultancy CCR Norm of 7.76)**

### 3. Sadness and Shock

Then our dear colleague, [REDACTED] took her own life in [REDACTED] June 2013. At a meeting only 4 days earlier she'd seemed happy, engaged, chatty, busy.

It would have been easy to leave out this part of the story; but one of our key learnings was the benefit of being truly honest with each other, even (especially) when it's tough. And that means being truthful about what happened, and how it affected us all.

There was deep shock, and desperate sadness across the whole OxfordSM community; and of course, a level of guilt and self-examination. What happened? What could we have done differently? How can we stop this happening again?

The team pulled together to get each other through the next few weeks, demonstrating what mutual commitment really meant in practice. We continued with our established plans, and the Happiness Survey in July actually showed a slightly increased score (7.8) and the comments showed how important the community was. But we felt we needed to do more than support each other informally.


We made a key decision: we would learn more about mental health – a subject we realised had not been discussed openly amongst our consultants nor understood previously - and we would commit to supporting our community and our colleagues in practical and effective ways.



# 4. Building Resilience

We embarked on a programme to learn more, and to apply learnings to our own organisation. We set no time limit or target, as we knew we needed to move steadily to enable engagement, and we wanted to make it a permanent part of the way we worked, not a one-off reaction. We focused on considering how to make the community stronger, and ourselves more able to support each other at tough times.


We started with an Evidence Base – our standard consulting tool to deliver deep understanding of an issue or challenge. Over 6 months of team study and investigation, many people contributed reports and articles, arranged interviews with experts, and contributed to the write up. We shared the progress and final conclusions with the whole team.



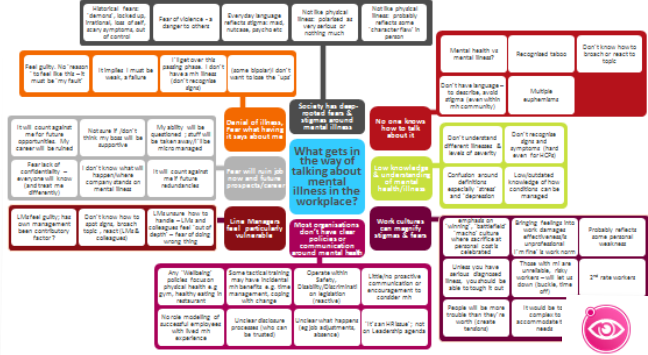
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## Barriers Map

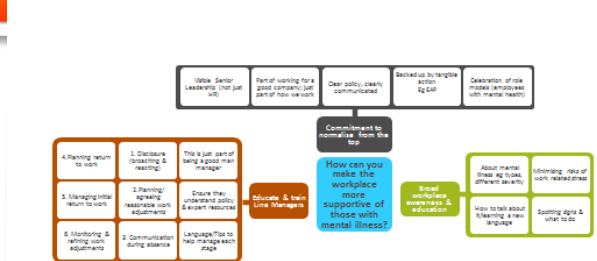


**What gets in the way of talking about mental illness in the workplace?**



## Drivers Map



**How can you make the workplace more supportive of those with mental illness?**

*(Note: the full evidence base is available on request to anyone who is interested – we are passionate about sharing this learning widely).*

Amongst our key learnings was that shame and stigma are a huge part of the problem of mental illness, as they prevent sufferers from getting the help and support they need. We realised that we needed to openly, actively and regularly talk about what happened – not to treat it as something to hide or avoid.

We also realised the importance of understanding and building resilience for individuals, as the key to being able to ride out the ups and downs of mental health in real life. We are uniquely susceptible to pressure – a virtual organisation where everyone works from home and could quickly become isolated; demanding clients under huge pressure themselves (no-one ever calls the consultants in when it's all going well and the projects are easy!), and extremely high self-imposed quality standards. Fortunately, our existing approach and business model was already a close fit to recognised resilience builders (learning, challenge, empathy, change, flexibility, and opportunity to give back) that we could work on.

Our action plan required us to:


- Continue to build **our knowledge, awareness and expertise**
- Create and share **tools and techniques** to help people
- **Maintain and build engagement** with an ongoing dialogue throughout the community, including our clients

## Knowledge, awareness and expertise

A number of colleagues attended Mental Health First Aid courses.

We arranged a Being Brilliant session for the team, which was indeed Brilliant.

### Mental Health First Aid



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What is Mental Health First Aid?

**Mental Health First Aid is the help given to someone experiencing a mental health problem before professional help is obtained.**

First aid for physical injuries teaches people how to give initial care until medical treatment is accessed, and Mental Health First Aid does the same for someone experiencing mental ill health.

Mental Health First Aid covers a range of mental health problems including depression, anxiety, suicide, alcohol and drugs, eating disorders, psychosis, schizophrenia, and bipolar disorder. It teaches practical skills.

**The aims of Mental Health First Aid:**

- to preserve life where a person may be a danger to themselves or others
- to provide help to prevent the mental health problems developing into a more serious state
- to promote the recovery of good mental health
- to provide comfort to a person experiencing a mental health problem

**Mental Health First Aid teaches you to:**

- Spot the early signs of a mental health problem
- Feel confident helping someone with a problem
- Provide help on a first aid basis
- Help prevent someone from hurting themselves
- Help stop a mental illness from getting worse
- Help someone recover faster
- Guide someone towards the right support
- Reduce the stigma of mental health problems

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Why Mental Health First Aid?

Mental health problems can affect people at any time of life in different ways. They affect individuals and their families, and friends, work colleagues and employers too.

Many people suffer a mental illness for a long time before they seek help. There is widespread ignorance of mental ill health in the general population and there is the associated stigma too. For some the stigma can lead to delays in people

seeking help and support. There is also a lack of confidence in what to do if someone is distressed or in a crisis situation.

Mental Health First Aid is a response to this with the aim of improving mental health literacy throughout communities, with the belief that mental health crises can sometimes be avoided with early intervention



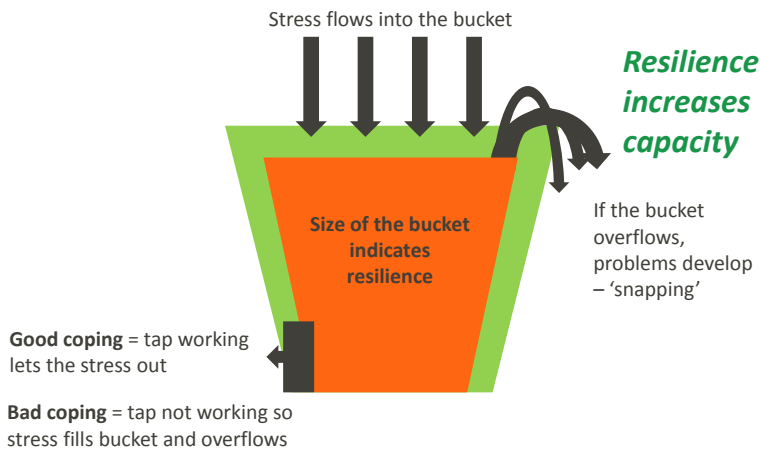
<http://www.artofbrilliance.co.uk/>

<http://mhfaengland.org/>

## Tools and Techniques

The key concepts that really resonated with us from MHFA were the 'stress bucket' and the 'stress curve', so we developed these into tools and a shared language that we all used and understood.

### THE STRESS BUCKET



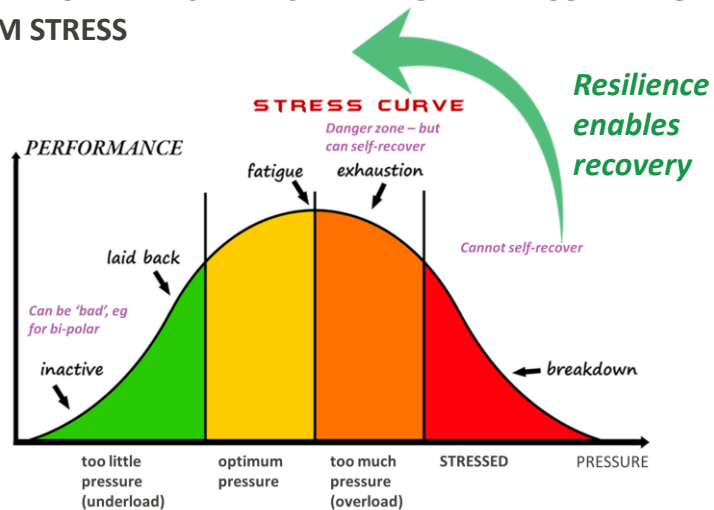
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*Stress Bucket tool from Mental Health First Aid*

### RESILIENCE MEANS WITHSTANDING AND RECOVERING FROM STRESS



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*Stress Curve tool from Mental Health First Aid*

## Maintain and build engagement

Communication within the community was key to engagement. A formal newsletter felt inappropriate for our warm, friendly team of equals; we wanted quick, relevant updates in a relaxed style. Our Managing Consultant began to send out communication emails every Friday to the whole community, sharing the stories and successes of the past few days, including the latest metrics from our key Y front goals.

We committed to actively discussing resilience and stress – even when it felt a bit uncomfortable – by putting it on the agenda of every team meeting.

As a virtual organisation, we lacked easy ‘water cooler’ moments to express our gratitude to each other for the help and support we receive. So we created the Thank You Wall, at our quarterly community meetings, where we actively expressed our thanks (and wrote up the post it notes afterwards to share with the recipients).



The Thank You Wall

The resilience tools were printed up as A6 cards, so that everyone could have them on their desks as a reminder.

Resilience is the ability to

- overcome challenges and withstand stress
- stay in control and adapt when events go off track
- reach out for new opportunities and experiences

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**THE STRESS BUCKET**

Stress flows into the bucket

Resilience increases capacity

Good coping = top working lets the stress out

Bad coping = top not working so stress fills bucket and overflows

Size of the bucket indicates resilience

If the bucket overflows, problems develop – ‘snapping’

**How to recognise resilience**

People with good levels of resilience demonstrate:

1. Realistic optimism
2. Keeping things in perspective
3. Embracing change
4. Calmness and focus under pressure
5. Ability to analyse & problem-solve
6. Self belief and confidence
7. Empathy with others
8. Desire for challenge and personal growth

**RESILIENCE MEANS WITHSTANDING AND RECOVERING FROM STRESS**

**STRESS CURVE**

PERFORMANCE

baseline pressure (underload) optimum pressure too much pressure (overload) STRESSED PRESSURE

field back

Control self-recovery

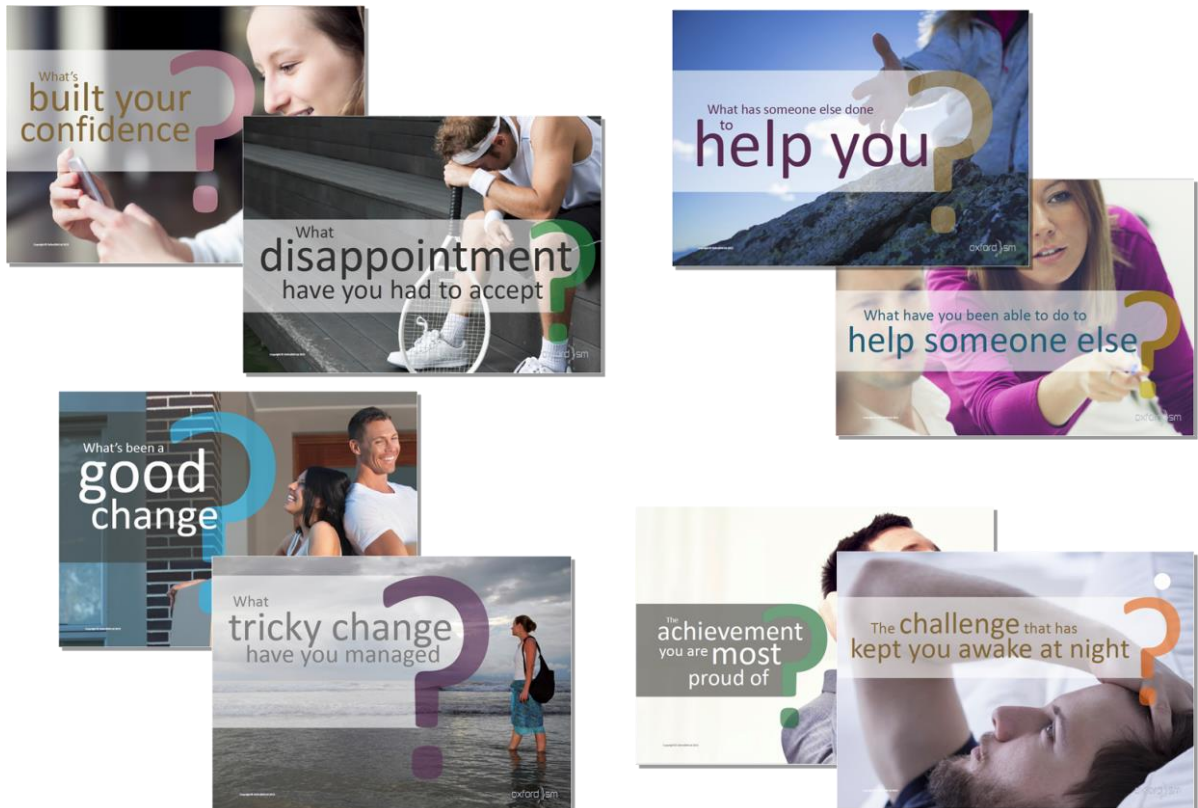
breakdown

**Our ways to build resilience**

1. Connect with each other
2. Keep learning
3. Engage with the world
4. Look after yourself
5. Give back

These are habits and behaviours that everyone can do, all the time, and which help us to build our resilience, to make us more likely to be able to be positive, embrace change, and solve problems

When we had team meetings, we tended to immediately focus on critical work streams and urgent client tasks. So to keep our own resilience top of mind, we created structured conversations at the start of every meeting, using cards that focus on both positive and negative challenges, and that reflect the key drivers of resilience such as coping with change, building confidence, and giving help.



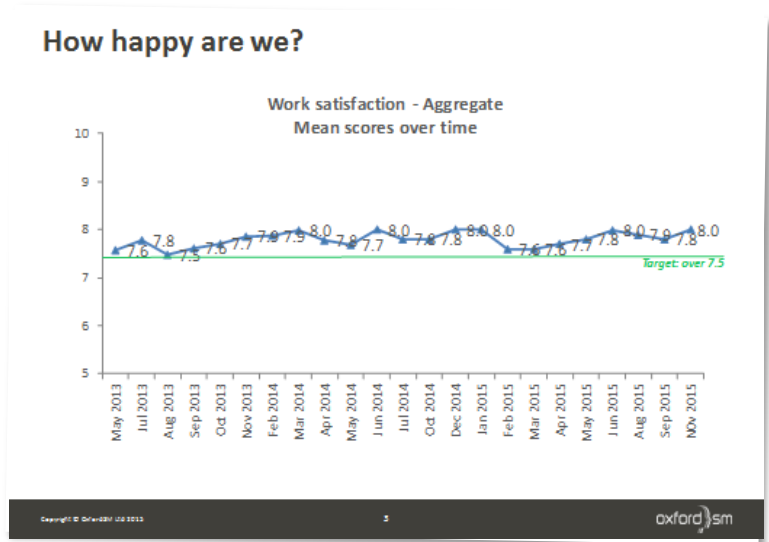
Our Values are included in our proposals to clients – they are as important as our CVs in establishing what it feels like to work with us.

And our recruitment includes ‘is this person on values?’ as a key decision-driver.

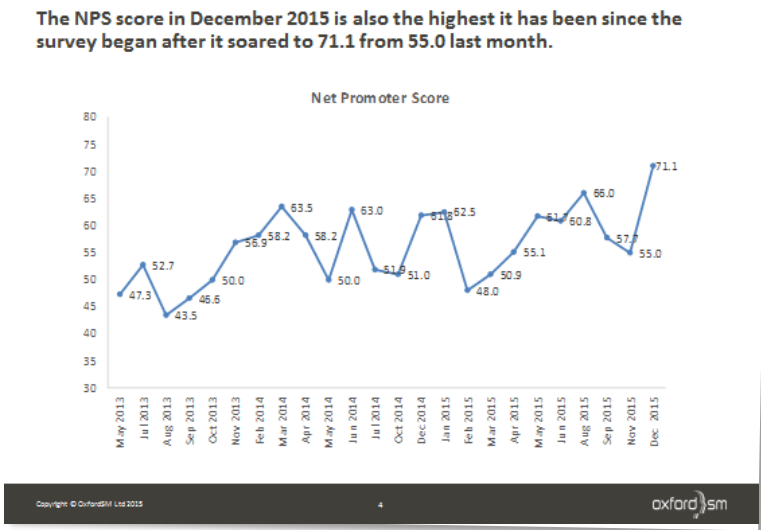
# 5. Measuring Results

## Measuring for ourselves:

With responses from 50+ individuals on every occasion, we have seen a steady score over 7.5, and often up to 8.0



But, recognising the tendency for this data to ‘average out’ with a lot of 6s and 7s, we wanted to see the highs and lows and to spot outliers. So we also analyse the data as a ‘Net Promoter Score’, which takes the net result of % of ‘Promoters’ (scoring 8+) minus % of ‘Detractors’ (scoring 5 or less).



It is constantly emphasised that we want to hear the truth – it’s not an exercise in whitewashing – and every month there are some negative scores and comments that prompt us to reassess our ways of working and improve things like our internal communications and project planning, in a constant effort to eradicate negative aspects of our colleagues’ experience.

## Measuring for people:

The Values survey at the end of 2015 demonstrated solid progress in most areas:

	2013 Mean	2014 Mean	2015 Mean
Overall – how do we meet our value of Personal Growth?	0.53	0.52	0.83
Overall – how do we meet our value of Mutual Commitment?	0.86	0.87	0.7
Overall – how do we meet our value of Making a Real-World difference?	0.71	0.81	0.97
Overall – how do we meet our value of Driving Higher Performance?	0.81	0.85	1.1

Of course not everything is perfect – we're growing fast, and our commitment to our clients can at times overwhelm our commitment to each other. But the action plan has clearly been impactful for people.

### Q 10. Are there any specific initiatives or actions which have helped us to better live our values over the last year and/or have improved the company as a place to work?

Better cycle 3 meetings - more purposeful and engaging. Stable and committed team. USA business fully integrated and staffed by people who share our foundation values.

More opportunities for associates to meet other team members face to face. Continued reinforcement of the company values, particularly the investment in developing associate skills - it's why we want to work for OxfordSM!

The Friday night emails from Jonathan are interesting in knowing what is happening elsewhere. The planning emails from Sam on time allocated against me is useful.

The conversations around mental health at work and particular the 'stress curve' I think have given us a great framework for talking about how we are feeling and how 'stressed' we are and hence what level of support we might want/need.

The conversations around mental health at work and particular the 'stress curve' I think have given us a great framework for talking about how we are feeling and how 'stressed' we are and hence what level of support we might want/need.

Resilience initiative has been valuable reminder to nurture ourselves and others. I can see that the more structured business planning approach has given folks a lot more visible confidence and optimism over future business. Resilience initiative has been valuable reminder to nurture ourselves and others. I can see that the more structured business planning approach has given folks a lot more visible confidence and optimism over future business.

Most importantly, over the last 3 years we've been able to attract and retain fantastic people to our organisation, and impressive partners to work alongside us on client challenges.





## Measuring for our business:

What we've realised over the last 3 years is that our team happiness, the satisfaction of our clients, and our business success are inextricably linked.

### OXFORDSM SUCCESS MODEL



#### DRIVERS

- Control
- Work quality
- Tools for the job
- Development opportunity
- Balance
- Social interaction

#### OUTCOMES

- 'Quality of work'
- 'Professionalism'
- 'Consistency'
- 'Partnering well'
- Responsible

2015 was our biggest year ever for both revenue and profitability, growth since 2012 .

## 6. What Next?

We believe in continuous improvement. Our values are being updated to reflect what we've learned about ourselves, and what our clients value – especially to capture that sense of partnership, and the value of the people who work on their accounts.

We continue to emphasise the importance of supporting each other through good times, and less good. Other challenges have come our way, as individuals and as teams, and our commitment to values has helped us through them.

There is a photo of our colleague on the office wall; as a reminder not just of how brilliant she was at her job and what she meant to us as a friend, but also of her legacy in helping us to look after ourselves and each other every day.

(1988 words)