Making Bold Decisions

Insights into leading through critical times

By Janelle Brittain, MBA, CSP

What challenge is your organization facing that may require a bold decision ... and that carries new risks? Perhaps totally revamping your governance structure? Considering a merger? Hiring a new type of executive director or CEO? Expanding into a new constituency? Rebranding? New twist on the organization’s mission? Need to move your headquarters? Membership in decline? Whatever the direction may be, staff is key to guiding a successful decision-making process and getting everyone on board. How you guide your organization through these challenges can be the critical factor in survival.

Here is the journey of two organizations that each went through a bold decision-making process.

Set the Stage

The first case was a challenge faced by the Emergency Nurses Association (ENA): Its House of Delegates, called the General Assembly, had grown to an unwieldy size. David Westman, MBA, CPA, CAE, CEO of Westman & Associates Consulting LLC, was ENA’s CEO at the time. The General Assembly needed to be downsized; however, before even mentioning this as a possibility to the board, the staff did extensive pre-work.

Make the Case Believable and Doable

According to Westman, “Our goal was to have answers ready for all of the board’s potential questions and objections and to be able to show how doable our strategy was when we presented it.”

Westman and his team:

• Identified problems and impacts associated with the General Assembly’s current size—including the financial drain and extensive staff support required
• Identified how the proposed change fit with the organization’s goals—in this case, how money, volunteer time and staff time could be redirected toward other key strategic priorities
• Painted the picture of completion, describing what the new General Assembly would look like; identified the pros; and conveyed how the cons could be mitigated
• Benchmarked with other associations that had reduced the size of their house of delegates and collected testimonials of their success

They then compiled all of this information into a solid, documented business case for change.

Address Their Fears

The second case was a challenge faced by the National Speakers Association (NSA), which encountered issues related to the rental of its office space. Marketing Strategist and speaker Thom Winninger, founder of the Winninger Institute for Market Strategy, was president of the board, and he and the staff followed an approach similar to that of ENA, in that they built a thorough case to justify buying a building.

Winninger knew the board’s primary fear was the financial obligation. He designed a plan where he would personally go to some of the leaders in the speaking field and ask them each to contribute their fees from one speech toward the new building. He was able to raise $250,000 for the down payment. He and the staff delineated the cost savings over time and the many other financial benefits. They turned what could have been a scary, risky decision into a “no-brainer.”

Love the Skeptics

Westman’s view is that we should appreciate and respect the devil’s advocates and skeptics. They...

People who don’t take risks generally make about two big mistakes a year. People who do take risks generally make about two big mistakes a year.”
—Peter Drucker
“Change involves bold choices that necessarily create risk. By moving forward boldly, we increase the value and impact of our work and inspire boards to lead their organizations into an environment of strength, resilience and endurance.”

Get Staff, Volunteers and Board on the Same Page

When bold decisions are being considered, it is common for the primary group that is working on them to get far ahead of other constituents. Communications are important. However, when a project or initiative is still in the early stages of development, you will need to make a judgement call for when to share information as it becomes available. For instance, the staff or committee that is doing the initial research may want to keep preliminary information confidential until it has been thought through. But once you are in the later conceptual stages and implementation stage, Westman recommends using every media you have available to share updates and current thinking. For every bold decision, we need the support of the board, membership and staff. If a bold decision is being led by the board, as was the case with NSA, Winninger recommends a focus on how the decision will impact the staff, looking honestly at the benefits and drawbacks. For instance, NSA created a zip code map of where its staff lived and compared it with the different locations NSA was considering for its new headquarters. They discovered that the staff would almost all have shorter commute times if the new office was located in a specific area.

Be Prepared for Emergencies

There will be times when you don’t have time for contemplation and across-the-board communication. Bold decisions may be required when:

- The press appears at your door unannounced
- A political leader negatively tweets about or comments on your industry
- There is the sudden loss of a leader
- An ethical issue surfaces

Making quick decisions about how to respond when something is immediate and has a high emotional reaction is the toughest scenario. Staff will need to keep their cool, as members or the board may be scared, upset or angry. Making decisions in these circumstances can be guided by your mission. In these moments, we must remember why we are here and what our purpose is.

Westman reminds us that it’s especially important in such situations to have an established team of board members and staff who are your most critical thinkers and, ideally, are not afraid to disagree with one another collaboratively. Look for people who remain calm under pressure. Emergencies are not the time to surround yourself with “yes” people.

Be the “Wind Beneath Their Wings”

We need courageous leaders who can lead us forward instead of allowing us to simply tread water, waiting for better times. The staff is the “Wind Beneath Their Wings.” Staff can help establish the balance of prudent risk taking and prevent the paralysis of trying to avoid all or most risks. Staff also can help guide the balance between looking down all the time at data and information and turning to look out the window, dreaming about what could be and inspiring a better future.

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Case in Point

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