Episode 2 – When Strategy Happens in a Room: Who Was There? (Who Wasn't?)

Regina Lewis Welcome to our current episode of The Inside Straight. We're not here to talk about poker. We're here to talk about communications and brand and what might be missing from your strategy. I am your host, Regina Lewis, and I am a brand transformation and PR reputation management expert. I will now introduce the team, and then we'll tell you about the hand that we're dealing. So on to Carolyn.

Carolyn Davenport-Moncel Hey, I'm Carolyn Davenport-Moncel, and I'm here to talk about strategy and also diagnostics.

Russell Holley Hi, my name is Russell Holley. I'm a strategist and implementation specialist. Hi, I'm Mark Evans and I'm here to talk about brand and digital integration.

Diego De Leon And I'm Diego. I'm a audiovisual, uh, expert. And I'm happy to bring some of the audiovisual insights into this discussion.

Regina Lewis Thank you Diego. So now we're going to turn to Carolyn, who is also our dealer. She's going to introduce the episode and also tell you what cards are being dealt this week.

Carolyn Davenport-Moncel Okay. So I'm dealing out the cards. And so this is episode three and we're talking about strategy happens in a room. Who was in it, right. So there's always an anchoring question that is who decided this strategy and who was not in that room and who should have been in that room. And the car that's missing this time is a diamond. That's what's missing, right? So diamond represents anything that has to do with actually the work. It's about budgets. It's about staffing. It's around um, um, resources, capacity, things of that nature. Earlier in an episode, we talked about who's missing in a room. But we were looking at it more from a leadership perspective. But this time we're going to talk about another aspect of it. And this time it's the capacities and staffing and budget.

Russell Holley So it's a really I want to sort of jump into this is that in my experience, a lot of organizations, you know, we were talking about earlier is that, you know, historically, communications wasn't actually part of their main sort of responsibility, the organization. Uh, and now, you know, it was all results in on or programmatically. Um, and obviously now I see a big change where it is a lot to do with, um, donors, uh, stakeholders want to communicate a message. So therefore there's a need, a growing need for, for, for, for the communications department. And you can see budgets increasing. Um, but then you need a blip as we've got recently with, you know, a reduction across the board in, in, in, in money. So is, is there the right people? Are there enough people within a, a communications team and within the whole scenario?

Carolyn Davenport-Moncel Well, I'll say one thing before I hand it over to say Mark. But there is growing, growing need for communications and that is exploding. But that doesn't necessarily mean the budget is getting any larger. And it doesn't mean that the capacity exactly is broken up even more. And and that team isn't growing any larger either. There's a larger expectation for them to do more with less. Right. And so at least internally from an internal perspective.

Regina Lewis So that's a happy saying. Do let do more with less.

Carolyn Davenport-Moncel Exactly. Yeah.

Russell Holley But does that mean that when decisions are made within a room and a team that the there aren't the right skill sets in that room.

Carolyn Davenport-Moncel Representing representing in that room, or at least in taking into consideration. Personally, I don't think so. I don't know, but I'm gonna hand it over to you, Mark. Any thoughts?

Mark Evans Yeah. I've got a particular case study that demonstrates all of those points. Really. So we were working with a client and they were asked to develop a data driven website or a portal. And this is entirely at the request of, of their stakeholders, the people that are funding the initiative. Uh, the comms team weren't even asked their opinion. They weren't asked, is this a good idea? Wow. What is what does this guy is what is

this going to achieve? So procurement got involved and they gave it to an organization in India. And they built the most complex database driven portal you have ever seen that was completely unnavigable.

Carolyn Davenport-Moncel So no one was asked. No one was consulted internally. And on top of that, they also just sent it away at the same time.

Mark Evans I got it and it didn't deliver what they wanted. And a year and a half later they asked us to. Hey, well, we really need you to sort out the the website because the user journey is not working and no one's being driven to this portal. No one's interested in it. So then we went back to, well, oh, the comms team were involved and we got UX, UI and we couldn't sort the portal out, you know, because that was already built. But we could make the website work harder. We could make the website much more representative of what that organisation was set up to do, instead of it just being an online brochure. And then it's unnavigable.

Russell Holley But they, I think that a lot of organisations, um, are, you know, they're sort of stuck with a rock and a hard place, aren't they? Because, you know, ultimately they, they, they feel the responsibility to the donor, especially if they're a big donor. Sure. Rather than looking at it as a. In a holistic.

Mark Evans I think you could have rolled a bit with that. You could have said, well, actually, the work that these donors are funding is valid and valuable, and it is important to get that out there. But we don't need five hundred data points. We need impact stories, and we need top line figures and things like that. But we don't need an unnavigable morass of of facts and figures.

Regina Lewis We need to ask what are we doing and what does it take? And I don't think that kind of thought goes in at the beginning. It's like, oh, we need a website and we need the kitchen sink. And a lot of times I think those decisions are made by committees. And if you brought comes to the table, they can narrow all of that down and make the work a lot simpler and a lot more efficient. It can.

Regina Lewis Much more cost effective.

Mark Evans Purpose. It could have a, you know, but it just.

Regina Lewis Yeah, from the beginning, because that's how that's how we're oriented. That's how we're trained. That's how we think.

Russell Holley Sorry? So are we then saying that Again, sort of. Communications teams aren't brought into the. In on around the table at the right time.

Regina Lewis I'll tell you a story from my experience. And I started an agency and then moved in-house. You know, like midway through my career, but I always tried to maintain an agency mindset and orientation because for me, in-house moves a little too slowly. So for my own sanity, I try to keep that mentality. And I will tell you in the last four or five positions that I had, I was hired after the role had been empty for a significant period of time, at least a year or and or I was hired following behind somebody who had either no skill sets or a very limited set of skills, like something like just media relations from a public relations standpoint, not the full spectrum. So I think that people really don't know what they need. You know, it's like the old saying, if your hammer, everything is a nail. And a lot of times communications gets looked at that way. It's like, oh, this person will do. They cost X? And Russ, in our earlier discussion, you were talking about how people divide up these budgets. Can you give us some insights from your perspective as an external agent coming into these scenarios?

Russell Holley Well, um, you look at it sometimes with, with amazement, um, thinking to myself, how, how have they divided that up? Is it because of their internal priority? They think that social media is this or they need more on the website has a stakeholder or a donor. Um, put certain criteria on them. So they've, they've put more funding to this and more funding to to that. There doesn't. It's an interesting scenario is that at any. I don't think in my career within the NGO sphere, there's been any sort of clear definition of how that budget is actually divided at all. I've never seen anything. I've never seen anything.

Carolyn Davenport-Moncel I've got.

Regina Lewis It from you.

Carolyn Davenport-Moncel Caroline. I've got a thought. So excited to answer this when I hit the microphone. But the thing is, is that what I've observed over this very long career is there will be budget lines for communications, but it's more like a giant pot. And that work that that money gets divided up along different, um, needs and different departments and things like that. And before you know, it, um, one of the things that I've really noticed is that communications oftentimes is very diligent about their budgets. They know what they have to spend. They protect it fiercely and they try to stay within budget. And I've seen that across many different lenses of this. Oftentimes what happens to communications is because they're so diligent about it and spending judiciously, some of the departments are not as good at that, which means they overspend their stuff.

Russell Holley So does it then get taken out of the yeah. That that that well managed communications.

Carolyn Davenport-Moncel All the time because they think you're not using it anyway. Instead of understanding that they're using it judiciously and being very careful about how they need to spend just.

Russell Holley Because they're being wise. And yeah.

Carolyn Davenport-Moncel And there seems that first of all, they're so tiny on top of that. And then from there, it's like, okay, you don't need all of that money because that could be done. More and more can be done internally. You don't need to use that money. And that money is it's the first place that people will go to take money and to, to actually fund something else, but go into the comms budget to go get it. And I've seen this time and time again over thirty five years. It's crazy how much that happens.

Regina Lewis I would agree with you, Carolyn. And also coming from agency when you have to, you know, like at least in the days that I was an agency, you had to account for your time every six minutes. You're very diligent about the budget. You always have a contingency budget and you manage those line items very, very carefully. And then when you come in house, it's like the robber baron, like you describe. There isn't, um, the thought that maybe your budget is the way that it is because you have things that are timed out. So as you need to ramp your budget goes up like, like a floating budget when things are low, maybe your budget's low and then you ramp up when it's higher and you assign it that way instead of having a flat rate every month, because you may not need to work that way. And I think there's a lack of understanding about how you work, what it takes to do what you do. And a lot of things are extremely expensive and not because you're wasting resources. It's because they are very time intensive. You still have to put your hands in it to make this thing come out. You are like a sculptor. You got to put your hands in that clay and there's no getting around it. It's and we'll talk about AI later, but there is no shortcuts. There's no silver bullet. Nobody's coming to save you. You have to work your way through these processes and procedures. And you need to keep the budget sacred.

Russell Holley But all all going back to that question about how how are budgets allocated? Um, you know, we're a, it's a, it's a, it's a global market. Um, and what, what does experience count for? I know that almost is a, is a separate sort of discussion. But yeah, it's, it's, we're talking about how, how does that room, uh, allocate budget for, um, a variety of, of communications tools, uh, for me. Sometimes I know we're talking about poker, but it's like Russian roulette. Yeah. I don't quite understand how it gets divided up. And, um, I, I, I would, I would want to think that the experience and the consultative level of a good agency is worth its weight in gold rather than, uh, communications almost being, uh, sort of just a production tool.

Carolyn Davenport-Moncel There's always a under underestimation of how much money is needed. It's back to what Regina was saying, you know, and a lot of times where that comes from is and where this gets better in terms of speculating about how much money is needed in the budget and what to ask for and, you know, to, to accomplish what deeds. It usually helps when that comes person that's on the lead on the has spent outside time. Time outside of the. Of nonprofit that they spent time in the real world because then they really understand how much that actually costs and what to allocate. And if I'm going to bring this agency in, it's going to cost me X and Y, and, you know, and again, back to what Regina said about the other time aspects of it, but if they don't know that, they really underestimate how much money they actually need.

Russell Holley Ask you a question actually from, from the sort of the, uh, the client side is, are you when you've been in that scenario and you've sat in meeting after meeting to develop, I would hope you've sat in the meetings is part of the conversations we've been having. Mhm. Um, do you suddenly, when you've been allocated the budget, do you actually sort of look at that and think sometimes.

Carolyn Davenport-Moncel Do I laugh? Yes.

Russell Holley You just.Think. After all those discussions, after all that do.

Carolyn Davenport-Moncel Not hear me.

Russell Holley And I've been given a third, a tenth of actually what we put in.

Carolyn Davenport-Moncel Yeah.

Russell Holley But the the the, the, the requirements haven't diminished. No, they've.

Carolyn Davenport-Moncel They've increased significantly.

Regina Lewis Yeah. They do. And one of the things that I know that people do, and I probably shouldn't tell this inside secret, but they tend to pad other areas that they know that management cares about. Even if it's like, say that management cares about events and maybe you think you only need five K, so you put in fifteen K so that that ten k is can fund some other things that you know, you need in addition to whatever you're going to do around that event. And I think that's because I think there's a gross underestimation of what it takes. Like Carolyn, Carolyn was saying, what do things really cost? How much time do they take? And what is the value of these things? Because I've also seen a lot of frivolity. I've seen people hire groups of people because maybe they have celebrity clients, but we're not in a celebrity driven sector, you know? Or they have this bright and shiny thing that maybe somebody in leadership either knows the person or thinks that would be cool. Instead of saying what's really needed, this is a good place to shift over and start talking about what are the assumptions that are being made when you get an inadequate budget or your budget's robbed along the way?

Carolyn Davenport-Moncel The first assumption is that you don't need all of that money. You don't need all of that money. You know, they're looking. And from day one, you know, they're thinking about, okay, there are other things. Or, you know, to be fair, from a leadership perspective, probably some new things have come aboard that may be they may be exciting opportunities. They may be a once in a lifetime opportunity. If only they had enough money to pull from in order to make that happen. The problem with that is, is that.

Russell Holley Take it from somewhere else. Yeah. Not the the.

Carolyn Davenport-Moncel Problem is in the.

Russell Holley Budget.

Carolyn Davenport-Moncel Exactly. The first place they just tend to look is coms first before they look.

Russell Holley Because she keeps leaving the pot full.

Carolyn Davenport-Moncel Yeah, well, the part of it is really like you've gotta already committed before anybody has a chance to put their hands on it, say sorry, that has commitment. Sorry, that has commitment. Oh, and that has commitment too. That's the only way you can really protect that, right? So I would say that that's the first assumption. You don't need all of that money. The second assumption is you have all the capabilities and that you and skill set that you need on your team, you guys can double up, triple up on the work that you do and that may. But meanwhile, you, you, you don't want to necessarily have people who are senior and can probably do two or three of those things. You don't want to pay them. You want to bring in juniors who only can do like a couple of things, but don't have the mastery to do the other things. And so then that's a big issue. And so you're dealing with that. And now the new our new friend on the board, whom I don't hate, but you know, AI can do the rest.

Russell Holley Oh yeah. That's that's a whole other.

Regina Lewis Or yeah, yeah, we and we need to hold that conversation.

Carolyn Davenport-Moncel For real. That's another conversation on AI.

Regina Lewis But you bring up a good point though around, um, believing that these junior people can do these jobs. And what that ends up the hidden cost is that the senior person now has to use strategic time to then correct that person's work, resource it to somebody else. And it's a lot easier to write something than to

correct somebody else's writing. And also then that person loses out on the on the learning. But a lot of times these people that got brought in, they don't have the proper skill sets. It's like, but they can write, but their background and training is nonspecific. It's not to the level that it needs to be, and it's not specifically oriented towards comms. And I think that's a real problem. Go ahead Kevin.

Carolyn Davenport-Moncel And then one other thing I want to say, and I want to pull that back a little bit when I'm talking about juniors, right. I think right.

Russell Holley Now, the two that you put your neck on the line.

Carolyn Davenport-Moncel Well, I'm going to slide it back off for a minute just to simply say, please don't judge me.

Russell Holley Just this once.

Carolyn Davenport-Moncel Please don't hate me, guys. But the real answer is I think that there is a real disservice that's being done to them, you know, because it's landing in their lap and they're saying, make it happen. And a lot of these, a lot of these, yeah, they're doing the best they can. A lot.

Russell Holley Of pressure. I've seen the pressure.

Carolyn Davenport-Moncel The pressure, the pressure on the liver is unbelievable. They're coming out of college. They're brand new spanking brand new degrees. And they're coming into these roles happy to get a role because there just aren't that many around right now. And then they're expected to know as somebody as old as us, and you're expecting them to know that, you know, but but who trains them? You know, someone's gotta train them. So it goes.

Regina Lewis Back to the expectation and not the training. And I've seen that with people who have on paper ten years of experience, but I surmise they've had five years of the same experience that they had at year five. They're not growing and evolving.

Russell Holley Yeah, yeah yeah yeah. But my, my sort of assumption to, to this topic is I think it goes into the same one. I think communications is especially for the organization is undervalued. Yeah. Um, it's understood. It's undervalued. It's misunderstood. Um, it's undervalued from a professional perspective and a financial perspective. So especially at the moment, less is expected to achieve more. Uh, and therefore it's almost a complete cycle. Therefore the organization does more in, in itself by itself and creates the strategies creates because it's worried about budget and then pushes it out to an agency that doesn't get the full picture, can't produce as good as it could have done if it had been more inclusive. So it becomes a cycle of sort of. An ever decreasing, uh, circle of productivity and creativity. Um, and that's,

Mark Evans I think they've got, they've got two aspects here and we've talked about it a little bit before in that you've got people that don't have the right skill set. Mhm. Yeah. And there's also a problem of progression within a role as well. Right. They've sort of been trapped in this. This is you do this one job and you continue doing that until the day you die.

Carolyn Davenport-Moncel Absolutely.

Mark Evans Um, yeah. And then there's the other side of the coin, which is we're going to employ three people. And when we talked about this a little bit before as well, employ three people at an enormous amount of cost where you could have employed a full service agency or you could have supplemented their skills. That's right. People that you've already got there in the team, or you could ask for help or training, or you could ask for them to implement implement tools. We've implemented various SEO tools for clients and train them how to use them so that they can then maximize content. And well, it's.

Russell Holley About empowering them.

Mark Evans Yeah, that's what I'm saying. Yeah, exactly.

Carolyn Davenport-Moncel That's exactly what he's saying.

Mark Evans Yeah.

Regina Lewis Yeah. Because the other part about that is, is undoubtedly at some moment that organization is going to say, right, we've worked with, you know, this external agency. They've done wonderful work. Now when can we bring it in-house?

Mark Evans Yeah.

Carolyn Davenport-Moncel And then when they do that, there is no one there that can actually continue that work.

Russell Holley But actually with this work and it's very quick within Regina and, and, and, and, and Carolyn's experience on being both sides of the fence does that sort of termination from an agency and well, we'll bring it all in house. Does it work.

Carolyn Davenport-Moncel Sometimes.

Russell Holley When does it work best and when does it work best?

Carolyn Davenport-Moncel Yeah, I have, I have sometimes.

Mark Evans We used to work in um beauty. Mhm. Um big beauty, you know, and their business model was give a company so much money they can't do without us and then say, we'll bring you in-house and we're only going to pay you half as much or we'll just cut you off completely.

Carolyn Davenport-Moncel Yeah, that really sucks. But but again, I'll just really quickly say it is about the skill set because one of the ways I've seen it work in those moments, A, they don't cut off the agency completely. Number one, as, as Mark is saying, they may reduce that and leave the, the, the agency doing the far more complex work to do. But then while they're doing that, they are literally leveling up and training up their people that's internally. And they have to do that in order to work. And oftentimes they pay the agency to train up those people and make sure that it works. And I have seen that work.

Russell Holley Is that financially work in the short term.

Carolyn Davenport-Moncel It probably it does in a long term, financially, it's going to hurt in the beginning to do that because you got to pay both. You know, you got to pay the agency to help you to do that. But in the long term, and if you're interested in investing in the the people that are on your team, and as Mark rightfully said, you're allowing them a space to actually move up as if that's part of it, then it can work. You know, the problem is they fail on one of these, you know?

Regina Lewis Yeah. The experience that I did have that is analogous to that is when I was at a very large agency and we had a large internal I mean, a large client who didn't have the internal capacity. And they wanted me to relocate from my city to their headquarters city to be a part of their internal team. And then it came down to negotiating the fees and the accommodations. And in the long run, they didn't end up doing it because the agency made it so cost inefficient that, um, it really didn't work. And part of the inefficiency is you're talking about somebody's life. If you move them from one city to another, do you move them full time? Are they going back and forth? What about the wear and tear? You know, the weekends and all of these other considerations. But one thing I do want to say is if you if you take these scenarios that we're talking about and you put them into any other context, you'd almost call it abusive because you have unrealistic unmet expectations weighing on people and they cannot possibly win. Yeah. And the thing is that comes people are like salespeople. They have to have a win. You need to be able to execute, see it come out the other side and not constantly have them against us kind of scenario when we can partner together and harmonize. Um, another example that did come to mind is I have had the company that I had the six agencies at one time, the CEO and the CEO were sitting around doing the budget and they go, oh, you know, I remember, you know, ten, fifteen years ago when we hired that agency and, you know, like we took them into these places and yeah, we don't really want to do that again. Like, and I were talking about all these desk side press tours and things they were doing and they just cut the budget. And I said to the CEO and I said, well, allegedly, I'm the chief communications officer. And nobody thought to ask me how I'm actually using this agency. And they just looked at me like I had four heads. Like it never dawned on them because the CEO is thinking back ten years ago when they hired the agency and they and at this point under my leadership, we made them an integral part of the team. We even went and did those, you know, forecasting meetings at their headquarters. We stayed there for a few days and did that with them. We invited them into our space and, you know, integrated

them and introduced them and made them part of our organization. But that was not consciously visible to the organization. So I think there's a lot of assumptions made about what money you need, how you use it, how it's allocated. And again, that goes back to trusting the people that you have at hand. And if you don't have the right people on hand to be able to do that and make those decisions, that's a you problem. You got to go back and say, why don't I have this? Or why don't I want this? Well, I think we have to come back and say, what are some of the recommendations that we would we would we would bring to the table. Because all of us have either been on the receiving side of that, you know, situation or we've heard about it or we had something very similar happen. So let's go around the room. Let's start with you, Mark, and then we'll go.

Carolyn Davenport-Moncel Uh.

Regina Lewis I guess that's clockwise. Mhm. Yeah.

Mark Evans Nice. Yeah.

Regina Lewis For the listeners.

Mark Evans At the core is about strategy, but it is understanding that strategy and having a real world perspective of it, and obviously integrating the comms team so that you can understand what internal capacities there are, understand whether you need to train people, whether you need to employ other people, and when you need to look outside for those external gaps that need filling.

Russell Holley Yeah, I think it's, it's, uh, in, in one respect, the, the, uh, senior management is trust, trust your team, trust that team to, to deliver on what they think that they need. Um, bringing the teams that you need to bolster, um, any of those gaps. Uh, as Mark was saying, I think that's, that's, that's a critical aspect, um, and respect communications, uh, and give it the budget that it needs to be able to deliver what it needs. Um, rather than, as Caroline keeps saying, it's like, leave my pot alone. Um, you know.

Regina Lewis Get out of my pockets.

Russell Holley Get out of my pockets. Uh, go, go and look for it somewhere else. I'm as important as everybody else. I think that's, that's sort of my takeaway from that.

Carolyn Davenport-Moncel My, my takeaway is, um, get very realistic about those things. I think a lot of times, um, you need to be real about the team. You got the budget, you got, uh, the capacity and skill sets that are available. You almost have to think about that when you're even writing a strategy. Yes. You have to, you know, involve the communications team, but they can tell you about that better than anyone. What they're working with, with the realities of what they're working with. And that's why it's so important that they take part in creating that strategy.

Regina Lewis Great. And to close out, I'm going to say something radical, which is to connect your budget to your business objectives and then give your team what they need to accomplish that goal that benefits the entire organization.

Russell Holley Right. Well, it comes to the end of this one is that thank you, everybody out there for being part of the inside, straight up. It does not promise perfect outcomes, but it can promise better ones. Subscribe to the Inside Straight. Send us your stories for analysis. Follow us on screen, our social channels for clips, reflections, and conversations beyond the episode.