

Mike Paton:

Hello, today it's my great pleasure to be speaking with Kelly Keefe. Kelly is the president of Employer's Resource Center, ERC, an organization that helps businesses with HR consulting, training, coaching, and research services for creating a healthy workplace culture. Kelly started part-time at ERC in 2004 and advanced to become the first female president of this 100 year old organization. Kelly, thanks so much for making time for us.

Kelly Keefe:

Thanks, Paton, I'm delighted to be here.

Mike Paton:

Thank you very much. So Kelly, tell us when and how your entrepreneurial leadership journey began.

Kelly Keefe:

Well, I started as president three years ago, I'm in my third year now and I had a great predecessor who had said to me, "Give yourself some time before you really start implementing a strategic plan." I was real eager to jump in, thinking that I needed to kind of set the organization on a new path being almost a 100 years old. And so I decided to wait, I took that advice and just kind of let things happen for the first year, filled out the organization. And then it was last year that I said, "Okay, it's time for the organization to do something." EOS hadn't been nowhere on my radar screen, whatsoever, completely honest with that. And then I was started all of a sudden about a year ago, starting hearing people talk about EOS and so I did a little searching out of it on my own.

I went to a session here, a public session. I think it was free and I heard some panelists speaking about their experiences with EOS and I left there, Paton, and I was so intrigued because what everyone was saying was, "Oh, it's so hard, but you have to trust the process." And so all of these intangible, almost comments were coming out of these people's mouth then I couldn't quite understand, but me being who I am, I said, "Well, I'm not going to settle for that, so I need to learn what they're talking about. And what do you mean it's so hard? Here's some super intelligent people up on stage saying it's really hard."

And so I debriefed with my now integrator, we were working together and we went for coffee after and I said, "What do you think? Maybe we should at least take the first step and read this book Traction." So I did do that and I actually asked my leadership team to also read the book Traction. It was around the holidays and I said, "This is your homework to do." And so we came back just in January of 2020, and we said together, "Well, we think this will be hard, but we think that this is about the right time for our organization to begin this transformation. And we think that this is a great process and tool for us to use." So [crosstalk 00:02:58] long answer but it was a long journey to get me to where I am.

Mike Paton:

That's great. So go back to you as a child, what are your earliest recognitions of leadership and the people you would look to in your family or school or whatever business enterprise you were signing up for, for sports, any of that, as a leader. Talk to us about your earliest impressions of what leadership means.

Kelly Keefe:

I am very lucky I have an amazing family with two amazing parents and my mom, she actually did not even attend college, but she was super involved in anything that she could get her hands on. She never

worked. She never worked outside of the home. I should be careful what I say there, right? But she was an amazing role model that said, "No matter what you know, you have skills inside of you." So she has these amazing skills. And so she would use them at our school doing different things. And then my dad had... My dad's always been in leadership positions and the way that they volunteered on boards. And so, I think at a young age, I realized that I was given gifts and I'm not allowed to just go to school and that's not allowed to be my only job.

I need to do other things. So I got involved in student council and in sports and in the plays and as many things as I could get involved in, I did. I remember a certain coach coming up to me at one point we were at softball practice. I think I was in fifth grade or so. And he said, "I think you have what we need to be the pitcher on this team." And here I am, nine, 10, 11 years old. And what does that mean? And so I think at a young age, I had an adult that trusted that I was going to be able to pull this team together. And I ended up going on and being a pitcher almost all the way through college or off to college, I should say.

And then student council I always stood out. So as many opportunities as I had as a kid, I would take advantage of those. And that was came from people in my life that kept encouraging me. And so I think at a young age, I realized how important it was to have leaders, when I have to sit on my hands sometimes is when I look at people and I realize they have so much to offer the world, but either they're afraid to, or they just don't take the time to.

Mike Paton:

So stay in that early stage, as you were sort of formulating your first impressions of what leadership looked like, what are some of the words you would assign to describe a good or effective leader?

Kelly Keefe:

Having empathy, listening, understanding, and not understanding almost the words that are coming out of someone's mouth, but understanding what's driving them to say those things. I mean, I do believe that I have a pretty good key understanding of emotions behind people and why people are making those decisions and that, so I think a leader, you can bring people forward or you can bring people along with you along the ride and make sure that they're enjoying it as well. So I think, that whole time as I've evolved as a leader, some of my biggest misses probably was when I wasn't quite understanding where someone was coming from and I assumed that they were on the same page with me and they weren't.

Mike Paton:

Well, that's a nice segue into the follow-up question. Did you learn at a young age or at any time in your career to assign words to not great leadership?

Kelly Keefe:

Oh, for sure.

Mike Paton:

So give me a couple of adjectives describing the kinds of things you've seen, not great leaders do, or maybe mistakes you've made yourself.

Kelly Keefe:

Especially today, but along the way as well, leaders that aren't nimble, leaders that are so set in their ways that they are not open to change. I mean, think about 2020, the leaders that are open to change right now and the leaders that are realizing that maybe they need to take a seat back, but there's other people around them that are smarter than them. When they're able to check their ego out the door, as you say, that those are the leaders that are going to be successful right now. And frankly, I think leaders that aren't willing to do that, you lose respect from a lot of people, people can see right through that, that are you in it for you or are you in it for the good of humanity and the good of the team?

Mike Paton:

Does a specific story or experience in your life stick out as an example of somebody who was set in his or her ways and wasn't a good listener and didn't bring people along with them or is this the amalgam of a bunch of different experiences?

Kelly Keefe:

I would say it's probably the group of different experiences. I will say, as a female president stepping into my role, there are definitely some people that I've kind of struggled with and how to respond to some comments and not looking to make this about that, but as a younger ish female president, I'm not sure if I was always taken seriously by other leaders. And so I had to, and continue to have to prove to others that I have the skills and they have the capabilities to do that. And so in response to your question, I think, leaders that aren't willing to give others a chance, leaders that aren't willing to see potential, or even take the time to help coach along the way. I think those are leaders that probably stand out to me that maybe I don't have as much respect for as other leaders [inaudible 00:07:59].

Mike Paton:

Well, a leader that thinks someone different from them can't possibly be as good at this as they are-

Kelly Keefe:

That's it.

Mike Paton:

Got a lot of blind [crosstalk 00:08:09] spots.

Kelly Keefe:

That's absolutely right.

Mike Paton:

That's very helpful. All right. So I want to come back to the present day a little bit. Tell us a little bit about ERC. What does the company do? Give us a two minute history, that kind of thing.

Kelly Keefe:

Well, it's hard to make a 100 year old company into two minutes, but I'll try, Paton. So we were started in 1920, actually, by business leaders that had gotten together. And there's an old restaurant club down here in Cleveland, Ohio where I am and they got together and they [inaudible 00:08:36] how there's all of these changes happening in our labor laws and unions were forming. And they said, "We want to be great workplaces, but we also need to continue making our widgets or whatever it may be. So we need

some help." So they got together and they formed this association. So that's what we are, we are an association, a 100 years old. So they hired somebody to come in and say, "We want you to be responsible for all of these resources that we need." Things like compensation data and help with compliance and training and all of those things.

And so fast forward, a 100 years later, we are working with organizations to help leaders make better decisions about their people. So we have so much people data, which is pretty remarkable. Every year we do a survey and we ask organizations in our area to fill out about their workplace practices. And then we evaluate them and then we actually take an additional survey and we ask them to send it to their top performers in their organization. So this year we have over 10,000 survey results from March till May of what top performers we're looking for during this COVID time.

So I'm calling that almost like liquid gold. I mean, if at the core of it, you know what top performers you're looking for in the midst of craziness and a pandemic. So we take all of these resources that we have. We have over a 1,000 clients that are working with us. And so we take those resources and we push them back out. So we have certified HR professionals that help on the help desk. So if you had questions, Paton, about your business, you can call into us and we get right back to you. So-

Mike Paton:

Let's dive into that because my clients and the clients of every one of the professional EOS implementers are dying to really understand what attracts and retains great talent. It's a big part of implementing EOS. And it's a great leader, is great at attracting and retaining highly motivated, highly effective people. So what are those kinds of people really looking for based on the data you're collecting?

Kelly Keefe:

So the number one thing that even this year we find is it's not salary, it's not benefits, it's the engagement of that professional. So you think about you as a top performer, you think about your team, what are they looking for? What drives them? It's the engagement, it's challenging and meaningful work, so that's what they are looking for. They might even tolerate a terrible boss for a long time, if they're working on projects that they absolutely love. Flexibility is also very a top of that, top performers. And I believe this, I will get the job done, but I've got three kids of my own. And so if I need to take a break from 11 to 12, if they're being homeschooled or whatever, I will still get the job done. Let me work earlier or later, whatever it may be. So top performers are looking for that meaningful, challenging work, and then also flexibility as well.

Mike Paton:

That's one of the observations I'm making now in the wake of the response to the pandemic is that people who have long resisted a more flexible approach, a more results based approach to evaluating employees have now been forced to accept that. And I'm hearing very consistently from my clients that their people are as productive or more so without the shackles of a 45 minute commute into downtown to come to the office. And you're saying that's been present for a long time. It's just being recognized now with top performers.

Kelly Keefe:

And obviously the top performers are those employees that are driving your business forward. And so for a long time, that's what top performers have been looking for. And I do believe that again, going back to a strong leader, a strong leader knows who your top performers are and gives your top

performers, "Hey, you're producing. So I'm going to give you flexibility if you need that." But at the beginning of this pandemic, Paton, I was interviewing a organization in the customer service team, he was talking about a professional who actually had just come back from maternity leave and who had a baby that they had to take care of. And this leader was saying, "Well, gosh, they're saying that they can't work eight to five." And I said, "Yep. And they're telling you the truth." They have a baby at home who is 12 weeks old and all this and they have basic needs that need to be cared for.

Mike Paton:

Who doesn't care that you have a meeting scheduled every day from 10 to 11, if they want something. That's right.

Kelly Keefe:

Right. So, hey, leader, let's be a little flexible with this employee who just has basic needs that they need to meet for their child. And so that was a challenging conversation for me to say to this leader who I thought, do you not recognize this? And I think the leader was saying, "But I've got the schedule." And yeah.

Mike Paton:

That's right. Thus, your comment about flexibility being important and occasionally common sense as well. Tell us what your, as the leader of ERC, what does a typical week look like for you? I realize there are probably none of those, but if you had a typical week, what would it look like?

Kelly Keefe:

I long for a typical week anymore, right? A lot of Zoom calls. So I meet with my team, we have our L10s on Tuesdays and that's a standing meeting. And then I have my one on ones with my direct reports on Wednesday or Thursday of the week. And the rest of the time I am shifting right now from, we're doing a lot of transformation within our business right now. So I'm spending a lot of time on that. Rolling that out to our organization, obviously going through the EOS process is helping us drive that, but I'm realizing the importance of, and I think most leaders are, the importance of me as the president being out as not only kind of in the marketplace, but also turning into more of a sales professional, trying to help drive our revenues into our organization. So my typical week is all over the board, but it's mostly meeting after meeting, but solid meetings driving the business forward.

Mike Paton:

And for the listener who's not familiar with EOS terminology, I'll say L10 is short for level 10, the kind of meeting we teach leadership teams to run every week. So that the quality is consistently near 10 on a scale of one to 10. In that answer, you shared with us a couple of things you've had to get used to recently that maybe weren't part of your job before. One was connecting with people via Zoom and running meetings and when you're not in person and then the other was selling, being out there, the face of your organization. So tell the listener what your approach to learning new disciplines is. How have you learned to develop yourself?

Kelly Keefe:

Well, I think through this pandemic, you almost have to trial by fire. So the Zooms, that's pretty easy technology, I guess, any type of session, but you need to prepare in advance for all of your meetings

when you're meeting with a client. You need to make sure that you're doing your research and you're understanding perhaps what's driving them. I never want to go into a conversation, just talk all about me or my business. I want to go in there and almost like this and ask questions, what's driving you? Because that's where you get to learn most about your clients is when you're asking them the questions and you're taking the time to listen. And then selling, I'm a people person, I enjoy just talking with people. And so we have done some sales training for our organization, those types of things, frankly, just reading, searching all those types of things, talking about selling in today's market.

But I will say that, it's a different approach today. You have to realize that organizations financially probably aren't where they want to be. And so I think that's where that whole empathy thing plays into this, having a real conversation. But I believe in what I am selling, I believe in my product, I think any leader is in the wrong position if they don't. And so I'm able to wholeheartedly share with leaders how beneficial it is to work with my organization. Think about of all the EOS clients who are going through this transformation, change management is hard for people. And then now you have a new boss, we've got all the services and tools to help through all of that. So like I said, and in some cases, unfortunately, maybe you let some HR people go or people took on new responsibilities. I mean, there's new legislation happening all the time it seems like. So I believe so much in what my organization is able to provide to organization.

Mike Paton:

What's the toughest thing you've had to do as a leader. What have you struggled with most?

Kelly Keefe:

I love change. If it's not changing, we're not moving forward. That's how I live my life probably. What has been hardest for me is realizing that not everyone agrees with that. And then also understanding why they don't agree with that. And so, the patients and when I look at somebody, especially younger professionals where maybe change is happening to them, or we're creating change for them because we want them to grow into other areas. We want them to know things outside of their own little niche. And when we get resistance to that, I want to just say, "Fast-forward 10 years, you're going to appreciate that you were exposed to these different areas."

I also say one thing that's hard for me is, I don't know if you've ever heard of the J curve, but you implement change and then just like the letter J for all of our listeners, the leadership is implementing the change. And they've been thinking about it, I mean, I've been thinking about EOS for... I've been working on EOS. I haven't even rolled it out to my whole organization yet. And I've been working on it non-stop for nine months now. And so then once it's implemented at the organization, if there's going to be a low period where people are trying to understand it and then I'm taking off and I'm moving on with EOS onto the next thing. So sometimes I say, "Kelly, just sit on your hands and breathe and let the rest of the organization catch up and understand what's happening."

Mike Paton:

One of my clients said to me, "Oh, I get it. You're trying to teach me that I'm no longer an individual competitor, I'm in a sack race. And our team can only go as fast as the slowest person in the sack."

Kelly Keefe:

Wow. Wow.

Mike Paton:

I thought that was pretty good.

Kelly Keefe:

That's true.

Mike Paton:

So you've mentioned a couple of times that EOS implementation journey and where your company is, tell us what things felt like before you started implementing EOS. And then when you're done with that, I'm going to ask you to describe what's different.

Kelly Keefe:

Okay. So before we implemented EOS, I mean, I've got an amazing staff and I've got an amazing team of dedicated, intelligent people. And I just felt every single day that we were going to work and working really, really hard and leaving at the end of the day just kind of exhausted. And wasn't sure, we were having an impact on clients, but not an impact across the organization and not a big enough impact I feel like with our clients and not gaining new customers. Not able to kind of dive into new industries, just kind of, because we are so client-focused, that's been successful for us, but I want us to grow as well. And so, like I said, we were just working really hard and not really moving the needle as much as I know that we could, kind of selling one service at a time to clients as opposed to offering a suite of services, those types of things.

So in some ways I just felt a little unorganized me as a leader because shiny objects, again for your listeners, if you don't know what those are is probably what most leaders have like, "Oh, we should go do this and we should go do that. We should go to this." So I like change and I love shiny objects. So I was doing that. And I realized that I was the one causing my staff to sometimes go crazy and spin their wheels on things. And again with that J curve, I thought it was a great idea. And a week later, my team is in a four-hour meeting trying to figure out how to implement.

And I was like, "Oh, are we still working on that? So maybe we shouldn't anymore." So anyways, I will say that where I am now, it's given me structure. It's given me tools that I know that my leadership team now feels comfortable saying, "Okay, Kelly, maybe this is a great idea, but we're going to go through a process and we're going to all evaluate, and we're going to discover together if this is a good idea. And if it is a good idea, how we're going to implement it and then let's figure out the timeline and all the other kind of stuff."

Mike Paton:

That's cool. What have you found most difficult or painful or stuff that the team struggled with the most?

Kelly Keefe:

Well, so I'll go right to the accountability charts. And we started, the first time we did the accountability chart was in, I think it was in January or February and we had to go around the room and tell everyone if they got it, if they had the capacity and if they wanted it, I had two people on my team that are amazing employees, but I didn't know if they got it. And if they had the capacity or frankly, in what case, if they wanted it.

And it was hard, that was really hard. That was one of those moments as a leader where you thought, what am I doing? Is this worth it? I have to tell you that both of those people are, one is no longer at the organization, but they chose a different path in life, which was perfect. And we still have a wonderful relationship. And the other one has had an amazing coach over the past nine months and is in places that I don't think that they ever thought that they could get to, but it was almost like we had that raw moment in front of the others that said you want it, but do you get it? And so if you don't, let's get you to where you need to be.

Mike Paton:

So just a brief note to bring the listeners up to speed. I've facilitated that experience for 130 clients at least once. And basically it's an experience where you create clarity of the role the company needs a person to be great at every day. And when that's clear, which it often isn't in a fast moving entrepreneurial company, then you look at the person who thinks they belong in that seat and tell them whether or not you think they get it, meaning they're genetically encoded to do it well, want it, meaning they genuinely spring out of bed wanting to be great in the role and have the capacity, meaning they've acquired the ability with education, training and development to do it well.

And it is hard, I've never seen a client be enthused about that process, but it is so relieving for the person who's been trying to fake it till they make it for six months. So I'm so glad you shared that with our listeners. It's just a really good story about the importance of clarity and the likelihood that it'll not only help your organization, but each of those leaders become their true selves in some role, that's a great fit for them.

Kelly Keefe:

That's absolutely right. It was really hard that day and the next, but we made it through.

Mike Paton:

Have you been surprised by anything you learned about yourself as a leader or a team member in this journey?

Kelly Keefe:

I knew the details are hard for me. I know that process is hard for me, but I didn't give enough credit to how hard it is. I have to give so much credit to my integrator because she is amazing and she's perfect as an integrator. And she is the one that really is driving a lot of the EOS process. And so I give a lot of credit, a lot of credit. And so what I have learned is I know what I'm good at, and I know what I'm not good at and I need to surround myself with people that are good at what I'm not good at

Mike Paton:

And again for the listeners, just a little bit of teaching. Kelly is a visionary in EOS terminology, meaning she's a big picture thinkers. She loves to operate at 30,000 feet. Nothing's ever impossible. We like the shiny things.

Kelly Keefe:

That's right.

Mike Paton:

And her integrator is the person who keeps the trains running on time, manages the day-to-day drives accountability. And sounds like you two have a great partnership.

Kelly Keefe:

We do, we really-

Mike Paton:

So tell us about how that works. How does a visionary integrator partnership work?

Kelly Keefe:

So, like I said, I've got ideas about things. I'm big picture, I'm a 30,000 foot, where are we going to be in three years? Where are we going to be in five years? Where are we going to be in six months? And then the integrator makes it all happen. Kind of puts all the pieces together, make sure people are in the right places to make it happen. Make sure that we have the right systems, make sure that we're meeting on a regular basis and communication is happening. Making sure that when I have my shiny object, that we're rolling into the organization, that it actually makes sense and we have the financial capability to do it. And that we have the systems in place to do with, those types of things. So, we meet regularly, obviously.

Mike Paton:

How does she convince you that an idea you think needs to be implemented right away might be a shiny object and we maybe need to take a little more time to think through this without coming off as a wet blanket?

Kelly Keefe:

Right. So I think that's tough, but my team does a really good job at it. So they'll say, "Well, why don't we make that an issue?" And so, I'm sorry if I keep using all this terminology, but I've sold my team, I said, "When I throw out shiny objects, say let's make it an issue." So we have a deal that that's what's going to happen. And so what that means then is I put it into our, we use my Ninety, it's a service software with it has for EOS.

And so I put it in there as an issue. So everyone on the team can see that it's in there. And so then we'll go around the room and they ask clarifying questions. They want to understand it. They're allowed to share their experiences in it. Well, Kelly, this sounds kind of like the shiny object you threw out two weeks ago that we decided wasn't a good idea. So, and again, when I go back to why I think I'm a good leader is because I'm able to listen to that. And I actually understand, and I appreciate what they're bringing to the table.

Mike Paton:

Right. Well, and as a visionary myself, sometimes you have to think through and figure out how to overcome those initial challenges because the fact that something feels like a shiny object today doesn't mean it isn't a good idea to implement it tomorrow. You just have to really understand where everybody's coming from so you can cloak it in the right language. And I'll be honest, of the 20 great ideas I have every week, 19 of them probably should never see the light of day.

Kelly Keefe:

That's right.

Mike Paton:

So just bringing us to a close, your leadership experience in the organization, I'm guessing has influenced or affected you outside your organization too. How has becoming a great leader of an organization changed your life at home or in your other passions?

Kelly Keefe:

I was lucky enough to be a part of a program, because I am president I was allowed to apply for a program that we have here in Cleveland, it's called Leadership Cleveland. I know that they've got these around the country and it was an experience I had with 60 other presidents, CEOs, leaders of organizations. And their goal is to have leaders of organizations work together to make your community better and to raise issues that are happening around systemic racism, poverty, infant mortality, all things in our community that are rampant and that putting a group of leaders together. So, I'll say one door open another door, which has led to me having amazing relationships with other leaders, with me having opportunities to help implement change and be a change agent myself. But I will say, the door was opened, but I had to walk through it.

And I had to embrace that. I had to think differently. I had to work with people that are outside of my comfort zone, outside of my past, outside of all of that. But wow, then it's just a full circle, it's 360. It's like what I learn outside of the organization, I bring back to the organization and I would share a lot with my employees. And then, so what does that mean? What are they doing for their community? So the circle doesn't end, as long as you as a leader are willing to, again, as we talked about earlier, listen to different perspectives, you don't always have to agree with it, but at least you're listening and you're understanding different backgrounds. And I think at the end of the day, people are good people. And you'd want to make things better for people in your life and outside of your life. So I'm so appreciative of the opportunities that have been given to me. And I just hope as I continue to grow, they just keep doing more, joining more boards, nonprofits, et cetera.

Mike Paton:

So that's a beautiful segue into my closing question. And I'm going to set it up with an observation and that is this, I'm a consistently optimistic person. I have a very positive view of the future. And it's because I'm surrounded by entrepreneurial leaders every day. And I truly believe our world is going to be positively transformed by entrepreneurial leaders. Not by governments, not by big corporations, but by people like you and me who are just plugging away every day, trying to make the world around us a better place.

Kelly Keefe:

That's right.

Mike Paton:

And so what I'd love you to do for the other entrepreneurial leaders who want to make a positive difference, is there one piece of advice you could give them that will have a positive influence on their lives and the lives of people around them?

Kelly Keefe:

Especially in 2020 and going into 2021, I would say, keep going and dig deep because there's so many days where you're exhausted by 8:30 in the morning, right? You didn't even sleep the night before because you've got employees that maybe they're on reduced hours, or maybe a spouse is just lost their job or friend lost her job, or they're fighting whatever it is, we are in a pandemic. This is not something that we've ever said before. And there's so much turmoil in the world right now.

And so as a leader of an entrepreneurial organization, you have the opportunity to create a safe environment for your employees, even if they're remote or if you're working in the office, no matter what the outside world is, their family, their friends, whatever it is, you have that opportunity within your workplace to make these people, whatever it is, four people, 10 people, a 100 people, et cetera, to make their lives better when they're working with you through meaningful and engaging work, whatever. And even if you're the widget maker, don't worry, what are you doing for the community? What are you doing? You can continue to expand the roles of every employee at your organization. And as leaders of entrepreneurs, you have the opportunity to do that.

Mike Paton:

So as Dory says, just keep swimming.

Kelly Keefe:

Just keep swimming. Just keep swimming.

Mike Paton:

Kelly, thank you. It's been a great pleasure hosting you today. I know our listeners are thrilled about what they've already learned and if they want to learn more about you or ERC, where should we direct them?

Kelly Keefe:

Well, thanks for that opportunity. Sure, yourerc.com. That is our website, www. Y-O-U-R-E-R-C dot com. And I would love to talk to anyone that wants to talk.

Mike Paton:

Great. Thank you very much. This has been Mike Paton with Kelly Keefe on the Lead Now Podcast. Thank you so much for joining us. And please remember to subscribe on your podcast application or to subscribe a friend so they can get value from the work we're doing together. Kelly, thanks again, really appreciate your time today.

Kelly Keefe:

Thank you.

Mike Paton:

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