





CHEAT SHEET

- *Bust those silos.* Reducing compartmentalization is key to integrating far-flung corporate wings, but this must be done with the input of those affected.
- *Balance culture and values.* Recognize the cultural variety that accompanies a global office, and embrace it – without sacrificing overall corporate values.
- *Time zones matter.* Simple steps, like verifying that an overseas call occurs at a reasonable hour, or scheduling emails to arrive in the morning, make a difference.
- *Don't neglect face time.* Bring together global team members for in-person interaction – not the technological kind.

OPTIMIZING YOUR GLOBAL LEGAL TEAM

By Susan R. Packal Are you leading a global team or is your team just global? As leaders make the leap from national or regional status to establishing a global presence, their challenge is to maintain their companies' core identity and culture while supporting the inevitable mix of growth and talent. The evidence for globalization is strong: In April 2015, Ernst and Young's Capital Confidence Barometer reported that in addition to 83 percent of executives viewing the global economy as improving, 84 percent of companies plan to expand outside of their home country in the next 12 months. Ensuring that their leaders demonstrate global perspective and diversity of thought will be key to their success. Cultural awareness and sensitivity are fundamental for leaders in building trust and credibility. Global perspective and some thoughtful approaches to makeup and structure are key.

Keep in mind that remote employees can feel disconnected, even disenfranchised. Although the corporate cultural recipe is often born at headquarters, it's important for dispersed employees to feel they have a role in helping shape the future of the organization. This diversity of talent, perspectives, thought, and ideas is, after all, what helped make the company great in the first place.

The business case for this optimization is clear and compelling, due to the increasing importance of and investment in expansion and globalization. Recognize that integration, diversity, and localization is critical; as leaders shift out to multiple locations they will want to maintain connection and collaboration.

Structure your team in a manner that reflects the global nature of your business.

Establishing senior leaders outside of the home office who are involved in the strategic decision-making for the broader team is a way to capitalize on the global perspective of your team members. Once those team members are in place, empower them to contribute in ways that are both valuable and locally relevant. Further, expose them to opportunities to vary those locales, truly equipping them to work as international business leaders. For example, our regional team leads in the legal department at Hilton are based in Orlando, Florida; Memphis, Tennessee; Watford, England; Singapore; and Dubai. In 2015, our general counsel instituted an international rotation program that allowed the leaders in Watford and Dubai to switch locations, and one of them had the opportunity to work out of the corporate home office this year. We also have office "intersections," a program that allows team members to work from another office for a week.

Laura Ball, Ph.D, director of law department operations at Corning

Incorporated, says that her company features a corporate center plus five business units and a large R&D presence. Legal department personnel, including approximately 60 lawyers worldwide, are integrated into and co-located with the business units, close to the general managers. Centers of excellence in operations and specialties cut across lines of business and regions.

Anne Sonnen, chief compliance officer for wealth management at Toronto-based BMO Financial Group, notes that her team includes country heads in most areas who speak for both the legal and compliance functions; this is the most senior person on the ground in the region, and he/she is accountable to the general counsel's leadership team. Some teams also have a global subject matter lead, for example in asset management. This provides Sonnen with a single point of contact for knowledge and information, and ensures consistency while mitigating risk.

"For a financial institution of our size and complexity, it's important to ensure that we have this second line in the regions — strong, independent functions and leaders who share the risk appetite of the broader organization," she says.

Emphasize localization rather than replication.

Ball emphasizes that law departments exist to help companies achieve their business objectives while minimizing legal risk. By making people part of the changes that affect them, rather

than inflicting it upon them, legal operations initiatives stand a greater chance of success. Rather than importing wholesale new processes and procedures formulated in the United States, allow for remote employee input up front. When implementing a new e-billing/matter management system at Corning, Ball solicited input from team members in Europe and Asia. This step led to a revealing discovery: The company's intellectual property function had a center of excellence that was handling invoices in the United States, but commercial invoices were handled in Europe via a different, very complex process. The exercise revealed areas of difference that could be reconciled from the outset, thus making the implementation of the new system smoother and more efficient.

Sonnen reports that her compliance team at BMO unveiled a silo-busting initiative this year, targeted at eliminating silos across regions and lines of business. "Traditionally, the lines of business have been structured based on their different regulators, but as the compliance framework has changed, we must operate much more collaboratively," she says. Cross-border, cross-discipline projects were solicited and recognized through BMO's Innovative Team Challenge, an initiative that garnered BMO recognition as a 2015 ACC Value Champion. What were the keys to their success? Make silo-busting activities a strategic priority and include them in performance reviews, Sonnen advises.



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Last, don't forget it can be helpful to *ask* team members in your regions what could be done better. After you have listened, following through on the appropriate suggested changes will be critical in building trust.

Be both a visionary and an ambassador of culture.

Leaders must find a way to strike the balance between promoting the winning aspects of the company — the core values — and the living, breathing culture that has contributed to its success and enabled the new regions and cultures to help evolve the company to the next level. There is a natural tendency to want to stay true to what has made the company successful in the past, but we must resist the temptation to cling to it. Fearlessness is required to allow organic growth in the context of culture; no cookie cutters allowed! Cultural richness is part of why your company expanded to that new geography; we must embrace it. But it is a matter of nuance.

“In the United States, many of us have lived with the Corning values that are part of our DNA, but in locations where this is all new, it is important to understand the individual's experience and to answer their questions,” says Ball. In a recent value redeployment campaign, each region celebrated the Corning values in a way that was relevant and specific to their location, allowing all employees around the world to have a personal connection to the core of Corning's culture. On Corning's internal social media, different business functions and regions shared how they were renewing their standards and employees from all over the world posted about the values. For example, Mexico had a festival that celebrated the values and included family members, and several regions had contests and awards. Almost every region had a forum that allowed for employees to ask questions and for leaders to communicate

specific examples and personal experience concerning the values.

Sonnen reports on an initiative called “Being BMO,” which focuses on nine specific actions that truly emulate the corporate vision. One manifestation of this was when BMO employees worked over the weekend to deck out the London office of a recently acquired company in BMO swag and decorations, right down to the screensavers on the computer monitors.

At Hilton, our legal department functions as a global team, so we must welcome all contributions regarding strategy and operations on the ground. Members must feel that they have a voice. We have spent a lot of time and effort on building this global wiring into how we conduct ourselves as one global team. It's not an easy task, and requires a lot of listening and follow-through, but it truly increases employee engagement, motivation, and loyalty. For example, we learned that we weren't always taking time zone differences into account when scheduling important conference calls. Remote staff who were unable to attend the calls returned to their offices the next morning to find a deluge of emails and action items as follow-up to a conversation in which they did not participate.

Once we created opportunities to have in-house lawyers and staff work temporarily from international offices, it totally helped change their perspective and made them much more empathetic to the challenge of trying to keep up with business partners and their colleagues in multiple time zones. One of the best practices became scheduling emails in Outlook to send several hours later. That way, recipients weren't feeling compelled to respond in the wee hours. I will admit that this has been a benefit even when messaging colleagues in the same time zone.

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Sonnen's compliance team members around the world take turns taking calls in the evening, and they ask people what time they prefer to talk. At Corning, the corporate flex-time philosophy respects the 24/7 nature of global work, says Ball. If employees take calls late at night, they are encouraged to come in later the next day or next week.

It is helpful to alternate the inconvenience of difficult time zones, and it goes a long way with the team. I often schedule meetings, such as focus group conference calls, at later times when team members in Asia or the Middle East can participate. I want to ensure that our international team members provide input and feel integral to the work. My projects have always been the better for it.

Act with global perspective – all the time.

Departmental actions and requests should be considered for how they will appear to those located outside of the corporate headquarters. For example, some holidays and traditions have no meaning or relevance outside of the United States. Although copying everyone on the email about the baby shower or bagel breakfast may be done with positive intentions, consider how the message may land with members of the team who are not co-located. Similarly, when sending an action item with a turnaround request “within 12 hours” or “by COB Friday,” have you considered the recipient's location and whether this is feasible? Be aware of things like religious holidays and Sabbath observances; for example, in Dubai, the workweek is Sunday through Thursday. This process should become second nature and part of how business is regularly conducted. It also offers your team members the opportunity to learn about the people, geography, and cultures of other countries. At Hilton, we have

had lunch-and-learn training sessions about cultural differences, as well as online learning opportunities to address this concept.

Take the time to educate your leaders and your team on how other cultures often differ in their approach to business. A great resource is *When Cultures Collide: Leading Across Cultures*, by Richard D. Lewis. He shares insights into how different business cultures afford status, structure their organizations, and view the role of the leader.

“People of different cultures share basic concepts but view them from different angles and perspectives, leading them to behave in a manner which we may consider irrational or even in direct contradiction of what we hold sacred. We should nevertheless be optimistic about cultural diversity... A working knowledge of the basic traits of other cultures (as well as our own) will minimize unpleasant surprises (culture shock), give us insights in advance, and enable us to interact successfully with nationalities with whom we previously had difficulty,” Lewis writes.

Here's a story I heard from a friend: A US-based executive of a large multinational corporation was sent to Tokyo to supervise a large Japanese team for an assignment to last several years — very challenging in itself without the wide cultural differences. One day while on assignment, one of the members of her team approached her very directly, and seemingly challenged her by asking her what she was doing in the office that day. She replied, “Well, let's see: I've got a couple of meetings, we're going to meet with one of the project teams, I have a ton of email to get through...” He interrupted, asking again, “No, I meant, why are you here *today*?” The executive did not understand the question and finally managed to work her way back to her office.

Overcome budget constraints for team building activities

Face-to-face team building activities are crucially important for building morale, camaraderie, and cross-cultural sensitivity. However, many law department operations are constrained by shrinking budgets for these activities. You can still be successful in your team building goals by using other creative approaches when having an “all-hands” meeting is just not in the cards.

- Combine on-site meeting opportunities with other departments in the company. For example, combining legal with finance is a good way to promote team building – not just between members of the legal department. It can be a wonderful opportunity to provide cross-functional learning and often results in better business partnership.
- Encourage leaders of the law department areas to invite other legal teams to join them for monthly, weekly, or off-site meeting opportunities. Having members of the teams do short presentations on a legal subject of interest is not only informational and helpful, it is a great opportunity to raise their profile and develop presentation skills.
- One of the most impactful team building events we do at Hilton is to volunteer jointly for pro bono and other activities. We had tremendous feedback for events such as packing and shipping meals to those in need, and clothing and food drives. These types of activities pull us out of our day-to-day work to focus together on a cause for the common good – allowing us to build emotional connections that typically do not occur in the usual team meeting setting.

She learned later in the day from a close friend outside of the company that the day was a significant anniversary: the bombing of Hiroshima. No one from the company — not even from global mobility — made any mention of the observance to US assignees in Japan offices, or anywhere else within the company. The executive was unprepared to demonstrate cultural sensitivity and compassion, thereby seeming insensitive to the perspectives of the team she was charged with leading. While knowledge and forethought would not necessarily have meant changing her plan to come into the office, she would have been at least prepared to operate with a level of sensitivity in a culturally charged work environment. In this case, I know her to be a strong leader who was in a challenging environment

and intent on building trust within her (predominantly male) team. With additional support, she may have been able to avoid such a cultural mishap and maintain credibility.

Opening the cultural dialogue with your team can save time and effort that would otherwise be wasted on cultural missteps common in conducting business. It also demonstrates that leadership is interested in building meaningful, lasting connections within the team. One thing that has been very successful for our team at Hilton is that our leaders have invested their time in visiting every corporate location around the world. Sonnen says they do this in the legal and compliance group at BMO as well, in addition to encouraging regional leaders and subject matter area leaders to visit headquarters in Toronto. They also have an informal secondment program.

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Resist the urge, driven by expense panic, to jam the agenda and eliminate downtime; the opportunity for serendipitous connections rates more highly with our people than any other offering. Unscheduled time also permits leaders to get to know their team members on a more intimate, personal level and learn what makes them tick as contributors.

It's easy to set this aside in the face of escalating travel costs, but we found it worth the investment. The team members in the regional offices appreciate these visits, especially the face time and the direct, unfettered flow of information. Perhaps the best thing your leaders can invest in team members is their own time.

"Leaders visit regional offices on regular as well as on an as-needed basis," says Ball. "Understanding the ways in which locations operate and the challenges they face facilitates the work of our new legal operations department that was launched in 2014."

Where beneficial to the position and appropriate, encourage team members at all levels to spend time

working out of one of the regional offices. This perspective can prove to be eye-opening as the person suddenly understands the challenges with time zones for meetings, the impact from lack of flow in communication, and the perspective of teammates outside of their day-to-day contact. It's fun! And it's guaranteed they will come back with some great anecdotes about their experience to share with the broader team.

Invest in teambuilding.

Don't underestimate the power of having "all hands on deck" meetings as often as you can. It's possible to hold these activities even on a shoestring budget (see sidebar), and it's well worth the investment. At Hilton, we try to hold these meetings every other year, far enough from the headquarters location so that people can truly immerse themselves in the event. Feedback shows that people leave these meetings with much stronger connections to the team: No matter how fabulous the programming we deliver may be, employees value casual networking time the most. Resist the urge, driven by expense panic, to jam the agenda and eliminate downtime; the opportunity for serendipitous connections rates more highly with our people than any other offering. Unscheduled time also permits leaders to get to know their

team members on a more intimate, personal level and learn what makes them tick as contributors.

Delegating portions of the meeting content and execution to cross-regional and cross-functional members of your team encourages cooperation and can produce groundbreaking and long-lasting results. For our event in 2014, we asked team members from different groups in the United Kingdom, the United States, and Dubai to work together to plan the entire attorney content for a two-and-a-half-day meeting. Planning these off site meetings can be a burden on everyone, but this approach divides the work and increases buy-in among attendees and participants. It also lends an authentic global character to your meeting.

Corning holds an annual law department conference near its headquarters in upstate New York. A global planning committee creates a two-day program for the approximately 140 participants. Attendees value networking overall, as well as teambuilding activities, Ball says.

This approach can also be applied to regular work. Encourage cross-regional and cross-functional teams to work together on projects. Bringing together people of diverse backgrounds, interests, and expertise has proven to be a remarkably rewarding experience for all involved. When we did this to create a legal professional

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Practice Resource

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development program at Hilton, team members from legal operations, brands, and compliance came together in a collaboration opportunity that typically does not occur.

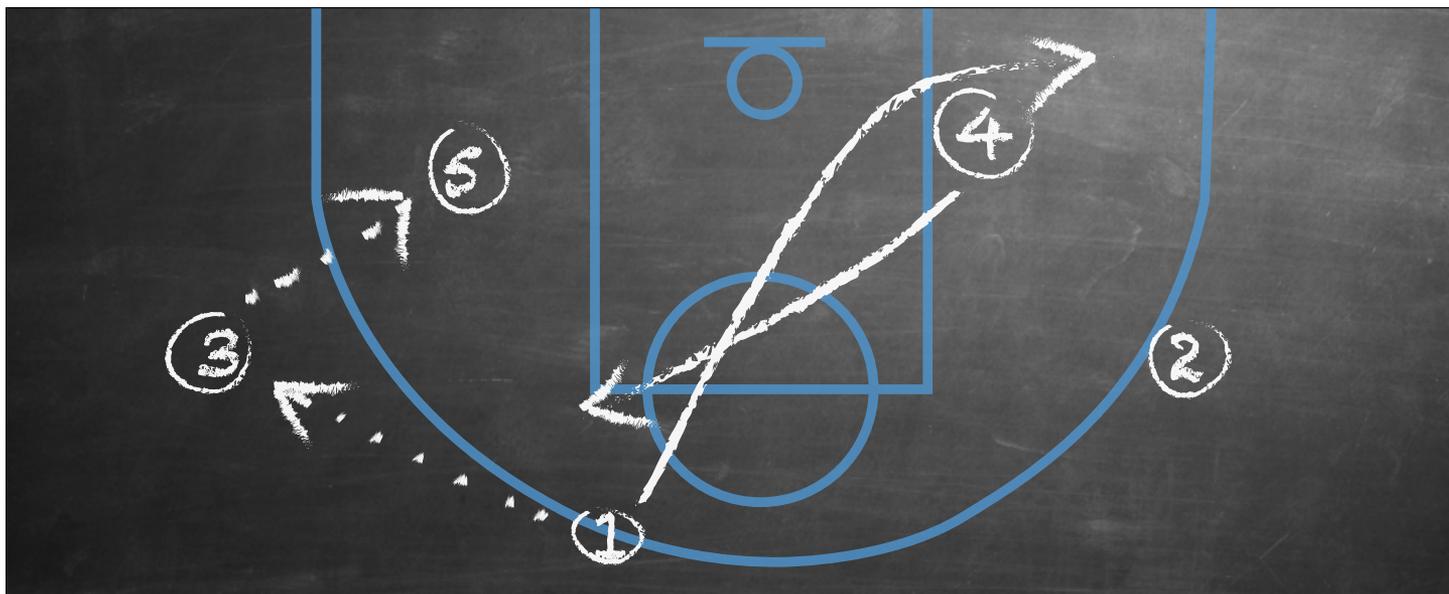
At BMO, work is organized according to strategic priorities that everyone can see himself or herself in and align to, and then collaborate with one another on projects across regions. Further, Sonnen says she has an expectation that my direct reports with a counterpart in another region will be in direct and regular communication with one another, sharing best practices as well as a forward-looking perspective.

The rise of global teams has been well documented, and we seem to be doing it better. While a 2001 study of 70 virtual teams found that 82 percent did not meet their goals, there was good news by 2009, when Aon Consulting reported that the

productivity of employees on such teams increased by as much as 43 percent (*anonconsulting.com*).

In the October 2015 issue of *Harvard Business Review*, Tsedal Neeley observes, “One basic difference between global teams that work and those that don’t lies in the level of social distance — the degree of emotional connection among team members.” The techniques outlined above — cultural awareness, promotion of diversity in thought, time zone etiquette, secondment programs and face time, and investment in team building — can have an enormous impact on reducing the social distance between your team members and equipping them for high performance in an optimized global legal team. **ACC**

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