



# Method 3: Vital Conversations

Method 3 of 5 Essential Building Methods to Grow Your Influence

**WCWI Well Practice**

Members-Only Resource





**WCWI's Membership and Community:**

As a professional development and consultation organization for wellness strategists and people leaders, WCWI will help your organization shift employee wellbeing to a foundational strategy that is valued and understood by all. Over 650 wellness professionals use WCWI's Membership and certified trainings to be empowered and equipped to create strategic change; while organizationally they're experiencing the power of a designed-culture where employees will feel a sense of community, purpose, and impact.

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## WCWI TECH GROUP

*We see this resource being born out of concern and urgency for wellbeing strategists...*

across the state of Wisconsin. What does it mean to practice the role of a wellbeing professional and how has it evolved? Over the course of these last 2 years, the collective brain power of 20 individuals from our TECH training program curated 5 building methods as being an ambitious reframing of the work of an employee wellbeing professional in hopes to enhance the influence and systemic impact of our work to connect people to wellbeing, people to people and people to culture. Throughout 2021, we will launch one building method per quarter as these methods align with our 2021 Learning Circle series training curriculum.

What are these 5 essential building methods that we are setting out to explore?

## 5 ESSENTIAL BUILDING METHODS TO GROW YOUR INFLUENCE

### 1. Contemplative Practice

A contemplative practice provides self-awareness to be objectively and mindfully aware of your thoughts and behaviors. Contemplative practice for a wellbeing leader is the daily thinking and actions that center you in your work – this can also be described as your habits. A dedication to contemplative practice ensures that you remain present, insightful, and concentrated on your purpose and your people.

### 2. Rhythms of Competencies & Skills

There is a unique rhythm of competencies and skills for the role of the wellbeing strategist. Rhythm is defined as an ordered recurrent alternation of strong and weak elements in the flow of sound. We are often asked to promote wellbeing systemically across the organization. In that endeavor, we encounter strengths and also weak elements such as obstacles in expanding the scope of wellbeing. As we counter these elements, we need to equip ourselves with a distinct blend of competencies, the knowledge and behaviors that our organization's culture exhibits in regards to wellbeing, and the correlating skills that will complement the strengths.

### 3. Vital Conversations

There is often significant emphasis placed on defining results and outcomes for your work in wellness. There is a priority placed on wellness to solve, or contribute to solving, complex problems such as reducing healthcare costs, improving employee morale, decreasing the health risks for individuals, improving the overall health of employees, and more. Empowering yourself to have vital conversations is the second method for growing your influence, redefining the impact of wellness, and co-establishing expectations for what wellness is, and is not, in your organization – all with the insight and support of your stakeholders.

### 4. Collaboration

Collaboration is an essential building method that provides the opportunity to organically bring people together under one shared purpose. We have an informal responsibility to remove siloes within our organization and collaborate to support employees in their wellbeing- all while managing the vision of building a high quality and effective team that is grounded in the foundational values of integrity and trust.

### 5. Building Community

Working in community with other wellbeing strategists allows you to gain additional perspective, find collective empowerment, and encourages peer mentorship. This session recognizes that we each have a unique and important perspective from our own work -- you may be solely responsible for the health and wellbeing initiative at your organization, or your job may require that a focus on wellbeing is only one of the many hats that you wear, or you may have a fantastic support network in place, or you may not yet have a network. To keep ourselves accountable to growing personally and professionally, we must work in community with other strategists to learn from others' strengths and expand our scope of thinking.



YOU ARE  
HERE

## BUILDING METHOD #3: VITAL CONVERSATIONS

### The Rationale:

Conversations with your leaders and decision-makers contribute to your work to uphold wellbeing as a foundational strategy at your organization. As you shape strategies to improve the experiences of your people, to establish wellbeing as a supported cultural norm, and to design objectives to reach long-term impact – your ability to have vital conversations will increase your effectiveness. Each of your leaders may hold a different perspective about the value of wellness as a priority. The intention of your vital conversations is not to change minds, per se, but to bring wellness and wellbeing up for a discussion in a new frame. Your preparation process to engage in conversations with your leaders and team will set you up for approaching these interactions with confidence and with an end-goal in mind. Through a 5-step thinking process, you will dig deep to identify the most important questions you want to ask your leaders, stakeholders, or team.

### The Opportunity:

Initiating and leading vital conversations with an intention to garner continued support and efficacy for employee wellbeing will be dependent on factors that are unique to your organization. These factors include: the current commitment from leadership, the current wellbeing strategy, the unique elements of your organization's culture and workforce population, and your vision for wellbeing. To build your skillset and confidence in preparing to have vital conversations at your own organization, work through this 5-step thinking process and use the worksheet below to write your thoughts and prepare for the impact you want to have.

### The Practice:

#### A 5-Step Thinking Process

##### Step 1: Vision & Wonder

Prior to any vital conversation in support of employee wellbeing it's important to identify the vision for success and wonder about the positive possibilities that can happen as a result of this conversation. Reflect on the questions below and write your answers in the Step 1 Column.

1. What is your vision for wellbeing at our organization? (For additional support in visioning, you can use WCWI's Well Practice: [Defining Your Organization's Strategic Wellness Vision](#))
2. What does success look like when talking about the health & wellbeing of your staff?
3. Wouldn't it be cool if... (fill in the blank)... resulted from me uniting leaders and stakeholders in pursuit of building employee wellbeing as a strategic priority?

##### Step 2: List the Facts

Now bring yourself to your current reality. What do you know to be true of your current wellbeing initiative and your access to leaders? List any outstanding and obvious facts that appear to you as contributing positively or negatively towards your conversation in the Step 2 Column.

1. On a scale of 0-10, how would you rate the strategic nature of your employee wellbeing approach? (0=your wellbeing approach is seen as a nice-to-have program, but it is not seen as essential and 10=your wellbeing initiative is fully integrated into your strategic business priorities and connected to your organization's vision)
2. What is your access to the leaders & decision-makers at your organization to have a conversation? Do you have direct access, indirect access through stakeholders or no access?
3. What are your organization's values? What are the connections you see between what your leaders already value and how wellbeing aligns?
4. How do your leaders prefer to communicate?
5. What type/s of employees do you serve? What are the needs you observe across your workforce?
6. What are organizational challenges you face?
7. What information do you need?

### Step 3: Learn the Lessons

After spending time visioning (Step 1) and listing the facts of your current reality (Step 2), look for a lesson to learn from each fact. Reflect on the questions below and write your thoughts in the Step 3 Column.

1. Who are the leaders and decision-makers that you need to speak with? Consider your entire leadership team and mid-level leaders – who stands out to you as most important to connect with?
2. What conversation/s do you need to have?
3. What questions do you need to ask your leaders?
4. As you think about your vision in comparison to the current facts and reality – is there a story you need to tell to describe where you are and where you see the future?
5. What would be the most meaningful way to move from your current reality to your vision?
6. What can you learn from what is taking place or what is being said?
7. Is there a gap that needs to be filled?

### Step 4: Personalize the Lessons to Your Strengths

After exploring the lessons learned from Step 3, now identify how you can be a key leader and influencer in applying the lessons learned to your vital conversations. Write your thoughts in the Step 4 Column.

1. What do you need to do better, or differently, in order to support ideas outlined in Step 3?
2. How can you influence and bridge the gap for your leaders to support moving toward the vision?
3. What are your personal strengths that you can use to help you in conversation? (For additional support in leaning into your strengths, you can use WCWI's Well Practice: [Take Inventory of Your Growth](#))
4. How can you bring others at your organization into these vital conversations?

### Step 5: Prepare Your Mindset & Take Action

After completing Steps 1-4, thoughtfully use this section to make a plan toward the vital conversation you need to have, who do you need to have it with, and what that conversation will require of you and/or your team.

It starts with you. As you prepare to have your vital conversation in support of employee wellbeing, ask yourself these questions to prepare your mindset. Write your thoughts in Step 5 of the worksheet.

- I am at my best when:
- The worst that can happen is:
- The best that can happen is:

Make your plan to have vital conversations:

1. Go back to the Step 3 Column and highlight what is most actionable.
2. Formulate the next action you can take to initiate a vital conversation.

**5 Steps to Vital Conversations in Support of Employee Wellbeing**

*Use this worksheet as a place to hold your notes & reflections across the 5-Step Thinking Process*

<b>Step 1</b> <i>Vision &amp; Wonder</i>	<b>Step 2</b> <i>List the Facts</i>	<b>Step 3</b> <i>Learn the Lessons</i>	<b>Step 4</b> <i>Personalize to the Lessons</i>
Use this Column to Vision & Wonder	Use this Column to List the Facts	Use this Column to identify lessons from each fact	Use this column to identify what these lessons mean for you.

**Step 5:**

*Prepare Your Mindset & Take Action*

*It's starts with you. How can you shape your mindset and what's your next action?*

**(!)** These four skills for wellbeing strategists are particularly impactful to call upon during vital conversations. Think about how you can use these specific skills from WCWI's Inventory for Growth as you prepare to have vital conversations.

**Skill - Seeking Impact:** You collect data and information relevant to business goals and strategies that have inherent connection to wellbeing. You utilize data collection and evaluation methods that measure wider scales of impact to the people and the organization.

**Skill - Storyteller:** You use data, representative perspectives, employee experiences, and industry insight to shape and shift the narrative of wellbeing at your organization. You understand that sharing these data stories and real experiential stories will contribute to a culture in which wellbeing is accepted and prioritized

**Skill - Coach Communicator:** You understand the value of engaging your team and leadership in discussions and strategic planning to develop toward a preferred future state, produce results, set goals, take action, make better decisions, and capitalize on the natural strengths of the organization. You communicate as a coach by listening, asking powerful questions, and strengthening conversations that you're a part of.

**Skill - Facilitator of Discourse:** As a thought leader, you believe in the power of conversation and the opportunity that arises from every new conversation. Your leadership of this verbal interchange of ideas is a simple cooperative practice that helps determine and define common goals, values, and meaning behind collaborative strategies.

## The Outcome:

Ultimately, you can continually use this thinking process to reflect on the value and impact of wellbeing at your organization and how you can be a key player in bridging the gap between your current reality and your vision for employee wellbeing. When you are confident, prepared in your mindset, and centered on your vision – vital conversations will become a core component of your collaboration and consensus-building to frame wellbeing as a foundational strategy and business priority at your organization.