



## INTERNATIONAL SPIRIT AT WORK AWARD APPLICATION

Name of Organization: Conner Partners

### III. The Application

Applications require a written description of the organization and a description of how they meet the criteria (see below). Please type your responses to the items below into this MS Word Document. Applications must contain sufficient background information so Committee members can make informed choices. Please limit the application to a maximum 12 pages in addition to this document (i.e., a total of 20 pages). **All applications must be submitted by email to the Committee Chair, Elisa Mallis, at [elisa@spiritatwork.org](mailto:elisa@spiritatwork.org).**

The contact persons cited on the application must make themselves available for questions should Committee members require more information.

Your application needs to include:

1. Basic Data:

a) Name of Organization (can be a division of a larger organization):

Conner Partners

b) Date of founding:

1974

c) Number of employees

(Note: Small Business—20-99 employees; Medium to Large Business—100 or more employees):

48 full-time and contracted employees (all references to employees includes full-time and contracted personnel)

d) Nature and scope of business:

Business consulting—strategy execution for transformational changes

e) Location(s):

Atlanta, GA

f) Website address (if applicable):

[www.connerpartners.com](http://www.connerpartners.com)

2. Contact Information

a) **Contact Person's Name:**

Daryl Conner

b) **Position:**

Chairman

c) **Phone:**

404-564-4801

d) **Email:**

Daryl.conner@connerpartners.com

e) **Cell phone:**

404-291-0020

f) **Mailing Address:**

1230 Peachtree Street NE, Suite 1000, Atlanta, GA 30309

Please provide full contact information for a back-up contact person in case we cannot make contact with you for any reason.

a) **Backup Contact Person's Name:**

Janice Darling

b) **Position:**

Vice President

c) **Phone:**

404-564-4839

d) **Email:**

janice.darling@connerpartners.com

e) **Cell phone:**

678-488-1925

f) **Mailing Address:**

1230 Peachtree Street NE, Suite 1000, Atlanta, GA 30309

**Note:** It is essential that all this contact information be provided so that we can follow up with you.

### 3. A Brief Description of Your Organization:

#### a) **What are the vision and mission, philosophy, and core values of your organization?**

The goal of our work at Conner Partners (CP) is to serve as coaches and mentors to people who feel inadequately prepared to navigate key organizational transitions. Our purpose is to assist them as they seek to solve their execution-related problems and fully realize their change-related aspirations. We seek to partner with clients who have honorable pursuits, working with them from both the shadows and the spotlight to help them navigate their own professional, and even personal, journeys.

We have a deep trust that our work accurately reflects how humans and organizational systems successfully change. This confidence is due, in large part, to the fact that our craft isn't based on recent discoveries. The techniques, principals, and guidelines we utilize reflect how people have always dealt effectively with transitions. We can't take credit for creating the frameworks we use—all we've done is observe and catalog what consistently works when humans don't hinder their own progress. We didn't invent our craft; we uncovered it. We don't dictate what it will be; it reveals itself to us. In an ultimate sense, we've been entrusted with its care. Our function is to pay attention and listen to what people do and say when they successfully introduce change, search for new insights, document what we learn, and pass these lessons on to our clients. We can only lay claim to our unique way of expressing how the dynamics of change unfold and the tools we've fashioned to facilitate the change process.

The integration of our Strategy Execution capability (our wide array of procedures, processes, skills, databases, concepts, and models) applied through Strength of Character (the individual and collective spiritual-philosophical substance of what we have to offer as human beings) within a well-managed, profitable corporate structure is at the heart of what CP is about. When people think about the strategic assets of a professional service organization, most consider things like acquired knowledge, expertise, tools, and techniques—what we call the functional elements of Strategy Execution. When they think of the factors that contribute to a consulting firm's success, they tend to focus on client procurement and cost/profit margin management. Few think about who they *are* as a core component of business success. At CP, however, we have found it is vital to dedicate some undivided attention to SOC to achieve the balance we seek.

Our Strength of Character (SOC) is at the core of who we are and must, therefore, be reflected in our work with clients and our relationships with each other.

Although we've each come to the firm for individual reasons, in doing so we've entwined our separate paths to form and follow a unified course. We believe there is a collective purpose behind the convergence of our individual journeys, and that this shared mission will have a significant impact on those we influence. In the words of Gandhi, "A small body of determined spirits, fired by an unquenchable faith in their mission, can alter the course of history."

What is this larger emerging future that is dependent on our combined "determined spirit"? We believe there is an answer. We do not suggest this is the only answer, but for now one thing seems clear: **We are here to serve.** There are four main constituents we believe we are here to serve:

- **Ourselves**—nurturing and safeguarding whatever is at the core of our internal employees' and associates' lives so that we can have the energy and capacity to serve others; we always seek the deeper truth in whatever happens and believe that every interaction is important

- **The CP Culture**—maintaining our culture and service to one another, with love, compassion, support, tough feedback and consequences; this is critical to us serving ourselves, our clients, and our community
- **Our Clients**—delivering our execution expertise and playing a part in our clients' lives that goes beyond the formal boundaries of our work
- **Our Communities**—contributing to and strengthening the larger human pursuit, sharing resources, and operationalizing the intangible

**b) How does your organization define “Spirituality.” How do you talk about the “vertical” and “horizontal” dimensions of spirituality? (minimum of 500 words)**

We only invite people to join CP who are on a spiritual journey. It doesn't matter what the nature of the journey is (we have Baptists and Buddhists and every variation you can imagine in between), but it is important that candidates demonstrate a strong commitment to some spiritual pursuit long before coming to CP. Although we express our spirituality in many different ways, everyone operates from a common perspective: There is an all-powerful force—an underlying purpose—that gives our lives meaning and shapes the way they unfold, and there are many ways to interpret the source of this power (God, nature, the ultimate intelligence, universal laws, etc.). Spirituality at CP means there is a higher purpose for what we do, and that direction—that purpose—is woven throughout the fabric of our daily experiences...with ourselves, our clients, our communities, and with each other.

Why did the people who now make up the CP community choose this setting from all the options available to them to pursue their professional careers? Why did we all show up when we did to play the roles we do in this particular organization? We're convinced there is intentionality at the heart of the emergence of CP and the convergence of the people who are its lifeblood. We are here to accomplish something specific and we wish to realize our own potential.

Our work in the area of Strategy Execution is critically important to us, but without the power and guidance that comes from our Strength of Character, we're convinced that—although we could succeed by external standards—we would actually lose our way from an internal perspective and fall far short of the great company we believe we have within us. SOC incorporates our spiritual, philosophical, and ethical aspirations to live all aspects of our lives consistently.

Underneath what we do is the client's experience of who we are as human beings; it is here that our true strength of persuasion and competitive advantage actually lie. Our ability simply to be with those we serve is our greatest asset. When we intentionally cultivate and stay centered on our true nature and relate to it as a core element of the value we offer, we live up to our own potential and help our clients do the same. We believe that:

- **It comes through us but not from us.** When clients and employees receive their greatest value from us, we are the conduit, not the source, of what happens.
- **Being here is not an accident.** We are in this place at this time for a reason. We don't believe that people join CP or that clients engage us by accident or through coincidence. Our task is to remain as centered as possible on our individual and collective purposes, and to help each other and clients who are attempting to do the same. We are not in control, yet we are accountable for our choices. Because we are subject to forces outside ourselves, it is an illusion to think we can control all aspects of what happens to us, much less to our clients. At the same time, we believe we are accountable for what takes place in our lives and the lives of those we influence. We are part of a universal dance—a grand design—yet we influence our own destinies.

- **We're all connected.** We may be separate waves, but we're all part of a much larger ocean. What we do or fail to do for someone else is in some fundamental way the same as doing it—or failing to do it—for ourselves.
- **We share the same journey.** We're all equals when it comes to finding our way in life. None of us has all the answers, and we all get lost occasionally, so understanding and compassion are essential to helping each other as best we can.

**c) How do you handle concerns about diversity of religions and what boundaries do you set around employees trying to convert each other, or in any way making others uncomfortable? To what degree do employees have a choice about participating in spirituality in the workplace activities? To what degree are employees able to express their own spirituality? Is there any form of spirituality that is excluded from the organization? (minimum of 500 words)**

At CP we share the belief that each of us plays a unique role in a greater picture that we cannot fully comprehend. We respect and honor the various views about the role humans have in a grand design, as expressed by different faiths or philosophies. We encourage each employee and associate to openly explore what it means to integrate this aspect of life into what we're trying to accomplish as a company. In short, we do not prescribe to any one particular "path" toward spirituality and welcome those who subject their own egos to pursuing "divine guidance" or "a higher power." We honor all of them and strive to create a functional link between whatever spiritual belief or philosophy someone has about how life unfolds and the day-to-day activities associated with his or her work at CP. This calls for practical ways in which an individual's connection to a larger purpose can have a constructive, pragmatic, business-related impact on client relationships and working relationships within the company. We value the diversity each employee brings and strive to identify common ground.

What helps CP ensure that our employees are able to express their own spirituality while balancing other's personal beliefs? Two components help guide us: respect and service.

**Respect** is a prerequisite to many of our SOC aspirations. It is not possible to be non-judgmental if we do not treat others with respect, because lack of respect leads inevitably to arrogance, condescension, and/or defensiveness. We believe being respectful involves more than behaving in certain ways; it requires a particular mindset as well. Authentic respect is not about being politically correct or displaying superficial politeness. There is nothing contrived about genuine respect for another. Respect is a natural by-product of gratitude and humility. We all know how it feels when someone does not treat us (or an idea we offer) with respect. We must, therefore, be careful to avoid thoughts or actions that would leave such an impression with others. Should one of us observe or be on the receiving end of such behavior from a colleague, our SOC challenges us to provide feedback to the person and, if necessary, inform others within the firm.

Religious groups differ greatly in their concepts of deity and practices. Non-theistic ethical and philosophic systems also exhibit a wide range of beliefs, but there is near unanimity of opinion among almost all religions, ethical systems, and philosophies that each person should treat others in a decent manner. Almost all these groups have passages in their holy texts, or writings of their leaders, that promote the ethic of reciprocity.

**Service** is a second component that helps ensure that each of us can freely practice our spirituality and realize our own life journeys. Being mindful that we are here to serve helps shape the way that we approach each other, our strengths, our weaknesses, our differences, and our spiritual journeys. We seek to help one another, invest in one another, and care for one another. By building each other up, we help create synergies that will have a greater impact—on ourselves, CP, our clients, and even our communities—than if we

either operate individually or attempt to “turn someone into someone they are not.” Just as our ability to influence our clients without pressure or coercion is essential, it is just as essential to work with each other without pressure or coercion.

### **Conclusion**

Our collective and individual spirituality is expressed in many ways at CP. A few examples are listed below. (A more detailed description is provided in the answer to the next question.)

- A day-long SOC orientation or all new hires
- Monthly SOC discussion groups
- Bi-annual All Hands meeting (which ends with a prayer to a higher power)
- Monthly global calls (which begins with a reflection)
- Formal community investment work (where explicit amounts of consulting time and monies are invested in our communities)
- Ongoing dialogue among all levels of the firm about the challenges and rewards associated with integrating our spiritual and professional lives.
- Spontaneous meetings of consultants to discuss and discover our purposes and journeys

The common thread found in each setting is an openness to explore what God (or whatever reference is used to reflect our higher power) is doing in our lives. We are very inclusive in terms of how we define spirituality—we want each individual to make his or her own spiritual connection and share that with the CP community. This diversity strengthens our firm.

#### 4. Core Application:

*The response to this section should be the heart of the application.* What policies, programs, or practices explicitly promote or enable spirituality at work? “At work” refers to your workforce. For the purpose of this award, the Committee is more interested in how your workforce is treated but we also want to hear about your customers and clients. Your application will not be sufficient if your practices do not include your employees. Explain the nature and scope of the organization’s activities, when these practices were implemented and by whom, relevant background, public visibility, etc. Finally, do you believe these programs will be sustainable over time? If so, why?

##### **a) Description of policies, programs, or practices (minimum of 1000 words):**

We use the SOC framework as our vehicle for integrating spirituality into the workplace. While SOC goes beyond spirituality, spirituality is the foundation to support everything included in the document. This is our way of *operationalizing the intangible* through what we do and who we are.

Because of the importance we place on our SOC framework, Daryl Conner, our chairman, is intimately involved in many of our SOC-related activities. This demonstrates to our employees and candidates the high priority we place on our SOC. We also recognize that we cannot become too dependent on Daryl to sustain our SOC and have taken steps to ensure that our culture can be sustainable.

### **Recruiting**

Our hiring process is focused on finding exceptionally bright and talented individuals with deep experience in leading organizations through change. To add to the complexity, these individuals also must have a predisposition for working in an SOC-friendly environment. All who join the CP organization take on a binding responsibility never to retreat from pursuing

the SOC challenge and the unparalleled opportunity for the personal, professional, and spiritual development it offers.

Finding the right candidates is critical to sustaining our culture. The candidate goes through an initial screening during the recruiting process to assess his or her fit within the SOC framework. Once the candidate completes all interviews successfully, he or she meets with Daryl for an in-depth SOC discussion and interview. The intent of this final interview is to ensure that the candidate has full information about the SOC environment and can make a conscious decision.

### ***SOC Performance Goals and Metrics***

Daryl schedules time with all new hires for a 30-, 60-, and 90-day review to help them address any issues encountered in acclimating to the SOC environment. During these review meetings, all new hires define specific SOC performance goals to include in their annual development plans.

The SOC performance goals are prepared annually. These goals are measurable and are tied to each individual's variable compensation. The individual works with his or her manager to ensure he or she is receiving feedback on these goals and has specific plans to address them.

### ***Training***

**Deployment Readiness Training:** All new consultants attend a two-week training program to prepare them for deployment at a client. This training focuses on “what we do”—our methodology and tools—as well as “who we are” and our approach to consulting.

**New Employee SOC Training:** All new employees attend a one-day SOC orientation, which Daryl facilitates. It is a highly interactive day focused on addressing questions, telling stories, and helping new hires understand both the challenges associated with SOC and the seriousness in which we hold it.

**Conner Partners Approach to Consulting (CPAC):** This is a one-week course that new consultants attend sometime during their first year at Conner Partners. Participants role-play different scenarios and in various ways establish a deeper connection to the fundamentals underlying who we are and our unique approach to consulting. The course includes further exploration into the SOC framework and how it applies specifically to client engagements. The SOC document (Appendix A) is considered confidential and is only used within the firm; a separate document, *Conner Partners Consulting Philosophy* (Appendix B), expresses many of the SOC tenets and is shared with clients. This document is a foundational element in the CPAC training.

**Mastering the Craft:** Once a consultant has been with CP for a year, he or she is invited to attend a one-week course focusing on the mastery journey. This includes clarifying and sharing our purpose in life and how this relates to our purpose at CP. The course ends with a commitment to support each other in the Mastery journey and a commitment (if desired) to continue the Mastery path.

### ***Monthly SOC Topics***

We recognize the challenge of staying present to SOC in the midst of client work; therefore, we look for regular opportunities to keep our aspirations top of mind. Each month, we select an SOC topic for discussion and reflection. As the SOC document has 30 segments, it takes more than 2½ years to go through the entire document.

- A quote related to the current month's topic is distributed to all employees each morning as a reminder for reflection.

- SOC facilitators are selected each month to lead a small team discussion. Daryl meets with the facilitators prior to each discussion to provide guidance and ensure leaders are prepared to lead the discussion with their teams.
- Small groups are structured into SOC discussion teams. Each individual re-reads the SOC topic for the month and is required to attend the team meeting. (A backup meeting is always scheduled in advance to address conflicts.) The teams meet at a designated time each month to explore the SOC topic and participate in a deeper dialogue. This is an opportunity for the facilitator to answer questions, clarify misunderstandings, and provide education where needed.
- Each SOC discussion team documents its discussion and distributes the notes to all other team members for review. The notes are also posted to the internal CP portal for reference.

### ***Connections***

Staying connected—to each other, to our commitment to SOC, and to our purpose for being here—is important to keeping SOC relevant within the CP community. We have structured opportunities for this purpose:

- Twice a year, CP has a mandatory All Hands meeting in Atlanta. A third of each meeting is dedicated to SOC. This is a time for open dialogue, questions, and a recommitment to our SOC journey.
- Once a year we spend time at our All Hands meeting to reflect on and share what SOC means to us, what we have learned, and what we are grateful for. While voluntary, most employees are eager to participate and share their stories. In past years, we shared through our “SOC tree.” Individuals first told their story, and then hung an ornament on the tree to represent it.
- Prior to most scheduled CP meetings, we have a moment of reflection to center the group before jumping into the meeting agenda. A volunteer will spend a few moments reflecting on something meaningful (usually a quote or passage from an inspiring source) before beginning the meeting.

### ***SOC Coaching and Development***

Each year we identify SOC mentors who are willing and able to support individuals in their SOC development in specific areas. This list of mentors is distributed to all employees and a mentoring relationship is often included in performance development plans.

Daryl conducts individual one-hour bi-weekly SOC mentoring/coaching sessions with anyone who requests it (currently nine CP employees). These sessions are focused directly on SOC or the application of the CP consulting philosophy.

Each year, a select group of people is invited to attend a weekend retreat at the Center for Inner Knowing. This weekend is focused on learning to live a more conscious life and breaking destructive patterns that hinder us professionally and personally. Following the retreat, a series of coaching sessions, spread over three months, helps individuals continue on their learning path.

### ***Keeping SOC Relevant***

While we are proud of our SOC document and aspire to live in a way that reflects the tenets described in it, we are also aware that we need to continue to review, refine, and update the document to reflect what we are learning. Each year we suspend the monthly discussion topic and ask all employees to re-read the document in its entirety and submit ideas for improvements. In this way, we continue to keep the document relevant and ensure it reflects what is changing within CP.

## ***Serving Our Community***

It's easy to lose sight of the fact that we are among the most fortunate people on earth. We are committed to balancing our prosperity through sharing with others.

- **CP Community Investment Program (CIP):** The CIP is designed as a vehicle for the firm to express its own sense of gratitude, compassion, responsibility, and stewardship. CP accomplishes this part of its mission by providing the time and structure for employees to participate in a process of synergistic sharing. At the end of each fiscal year, a percentage of the company's annual profit is placed into an account for distribution to groups or institutions engaged in charitable activities we would like to support. Last year we distributed \$22,000 to various charitable organizations. In addition, a percentage of the aggregate time available for normal work activities (slightly more than two days per year per person) is allocated into two categories:
  - **Vision Partner Projects:** Each year, we select at least one "Vision Partner" in which to invest ourselves. A Vision Partner is an organization (usually nonprofit, such as a church, synagogue, mosque, school, volunteer organization, or civic group) that is pursuing a vision we believe in and that we feel could benefit from our Execution Engineering™ expertise and/or IP, but that lacks the funds to secure our services. After selecting the Vision Partner client for the year, we assign a client development executive and consultant(s), as needed, to address the strategy execution needs of that organization in the same manner and with the same dedication to excellence we would for any of our regular clients.
  - **Community Work Projects:** Each year, we select one or more "Community Work" projects that provide us with an opportunity to come together as a single, firm-wide team or in smaller teams to support causes we believe in and want to invest in with our physical presence. The entire organization (or specific teams) spends the allotted time in service to these projects. Our duties might range from serving food at a soup kitchen to building homes with Habitat for Humanity. Community workdays are scheduled one year in advance to avoid infringing on client activities and to minimize any internal disruption.
  - In addition, **CIP Quick Response (QR)** involves undertakings that, by definition, cannot be predetermined or planned. They are Conner Partners' answer to unanticipated situations we feel compelled as an organization to address—typically related to some type of individual or community trauma in the Atlanta area or in one of the cities where we are conducting substantial engagements, or that has a personal connection to someone in the CP community.

## ***Running Our Business***

- We believe that the SOC framework is fundamental to who we are in a business context, and that it provides the foundation for long-term growth and allows us to be successful in what we do.
- While we have established programs to support and operationalize the SOC framework, the single most important thing we do is use SOC as a tool in running the day-to-day operations of the company—as a filter in making decisions, reviewing actions, and providing feedback to each other.
- In addition, on each of our client engagements we conduct quality reviews and post-implementation reviews. SOC-related questions are woven into these reviews as a way to ask ourselves if we are living up to our SOC standards and looking for opportunities to improve. Also, if we should have a quality breach on a client engagement, we

immediately conduct a Quality Learning Review, where SOC standards play an integral part in reviewing what we learned and determining what we can do differently.

### ***Sustainability***

While the programs we have implemented may change or be replaced, we believe the intent of creating the culture described in our SOC document has long-term sustainability potential. To ensure this, we engage in certain activities:

- As mentioned earlier, we only invite people into the firm who show a predisposition toward operating in an SOC-oriented work environment.
- SOC is not a peripheral endeavor at CP; it is completely embedded into our business model and is an integral part of our cultural DNA. Any attempt to extract this feature from our firm's landscape would result in a collapse of the business. For this reason, sustainability of SOC is synonymous with sustainability of CP.
  - Senior leadership team members at Conner Partners strive, on an ongoing basis, to incorporate SOC into their own day-to-day operations. Individually, they meet with Daryl for active coaching/mentoring and feedback toward this end. We believe that deepening SOC across the leadership team is critical to sustaining the culture we are building and we dedicate the time and energy to ensure that this happens.
  - Daryl and our CEO (Patrick Litré) have a standing three-hour meeting on Saturday mornings for the expressed purpose of exploring how Patrick can carry on the SOC legacy after Daryl retires (expected within the next few years). This is not a time for conducting regular "running the business" conversations. These meetings are exclusively to help Patrick be fully prepared to maintain the integration of SOC and the business operations when Daryl steps down from his duties.

**b) What has been the effect of policies, programs, or practices on stakeholders? Stakeholders include employees, owners, customers or clients, suppliers, communities in which business has a presence, etc. A separate attachment with verbatim testimonials is allowed. Please email this attachment separately and limit to 4 pages (in addition to the maximum of 12 pages on the Application) (minimum of 1000 words):**

We believe there is a market for telling the truth, a market for a spiritually based firm, and a market for **who we are**. Describing the effect of this belief and its supporting programs is a bit like trying to describe what it is like to work in the light after an entire career spent toiling in the dark, or how it feels to come to work with all your limbs free and usable after decades of being forced to work with an essential part of yourself bound. Words are inadequate. What we have at CP is unprecedented, and the impact on our stakeholders is tremendous.

### ***Employees and Associates***

The greatest impact of "who we are" accrues to our employees because it allows them to fully express themselves—their intellectual strengths, professional skills, and spiritual paths—and bring the entirety of themselves to the job. In fact, doing so is a requirement for being here. This imparts a **sense of wholeness** to the individual.

Employees feel that being at CP supports the **achievement of our individual purpose**. We believe each of us is called to a singular and essential life purpose. We further believe that if we are to achieve that calling, our work must be aligned with it. To that end, we encourage our employees to share their calling, and to clearly establish, for themselves and others, the connection between their calling and our work. The act of publicly expressing that calling in itself is liberating and joyful; it has the added benefit of accelerating progress toward the calling. A wise person once said, "Put your dream to the universe and the whole world will

conspire to make it so.” We’ve found this to indeed be true. When we articulate our purpose to others, invariably they want to jump on board and help us succeed. The result is that we enlist the collective in achieving our life purpose.

We believe that when we’re at our best, what happens comes not from us but through us. Our potential unfolds when we tap into a much deeper reservoir than we, individually and collectively, can take credit for. We access this reservoir in a variety of ways. Sometimes, before important meetings, we pray together to whatever each individual considers his or her divine source for the ability to meet the client’s needs during the session. Other times, we apply the Holy Hat for decision making. This involves dropping a symbol for each option into a hat, invoking divine guidance, and withdrawing a symbol representing the decision to which we believe the divine has guided us. In all cases, the effect is that **we are strong because of the strength that flows through us** from a higher power.

At CP, **our spiritual needs are supported and nurtured**. We believe each of us is in this place at this time for a reason. We don’t believe people join CP or that clients engage us by accident or through coincidence. Rather, people come to resolve things in their lives and/or to develop themselves in certain ways. The firm offers myriad approaches, internal and external, to help individuals recognize and remedy their spiritual needs. In addition, employees support each other. As a result, wounds are healed, barriers are removed, and the way is opened for higher spiritual evolution. Our employees feel supported on their spiritual path; we know we do not walk alone.

Recognizing that what we have achieved here is precious and fragile, we protect the environment within which it can flourish. We teach and encourage our employees to establish boundaries surrounding a space for personal balance and renewal, and to enforce those boundaries vigorously. We support the quest for understanding how balance and renewal translate differently for each individual, and we respect the unique answers. The effort required to define our own boundaries, as well as to accommodate the boundaries of those around us, is significant; so are the rewards, as **each of us is able to stay present, keep connected, and each day bring our very best to each other, to our clients, and to our spiritual journey**.

### ***Clients***

The effect of CP’s Strategy Execution expertise on our clients is clear. We help clients succeed where others would fail. The results, as evidenced by change success rates and by the feedback our clients offer, are compelling. We believe the effect on our clients of our spiritual orientation is equally compelling, though the client may not always recognize the impact or its source.

Consider George, the client delivery manager for a project we supported. George had been with the client for more than 20 years, and had been successful. Because of that success, he was chosen for a key role on a business-critical change initiative. George was partnered with a CP consultant to learn to apply a completely new approach, our Change Execution Methodology, to the initiative. George struggled to replace skills and habits reinforced through years of doing things the “old way,” and failed to produce results for the new initiative. His prickly and obstreperous manner didn’t help matters. His supervisor finally summoned the CP consultant to say, “I think I’m going to have to replace George. He may or may not be able to find another job inside the company, but we’re going to fail if he keeps this up.” The consultant’s reply was, “Let’s give him a little more time.” What the supervisor didn’t know was that, for some time, a stealth campaign had been underway within the CP team. In this campaign, team members had prayed for George’s success. They had partnered with each other to role play interactions with George, and practice approaching him with acceptance and support. Now, the consultant began encouraging George’s

supervisor also to approach him with acceptance and support. Over the next few weeks, a new George emerged, less prickly, more open to new approaches and coaching, and within two months George staged a hugely successful event. It was something never before tried in this company, and it was greeted initially with skepticism from the participants, but George persevered in the face of that resistance and pulled off something remarkable. Although he doesn't know it, there is no question George's transformation and resulting success were the result of the prayer, acceptance, and loving support brought to him by the CP team. What George knows is that he learned some new techniques and became successful, and that is enough.

In other cases, the client is acutely aware of the effect of CP's unique nature. One of our practices is to establish quarterly Promise Partnerships with clients. Within the partnership framework, we set mutual goals with the client, and we put 20% of our fees on the line as a penalty for failing to meet the goals. Many clients, accustomed to dealing with consultants who are not transparent and who don't put the client's interests first, are distrustful. They tend to build enormous detail and self-protection into the Promise Partnership. Of course, there is a price for all that complexity, in that managing it consumes a great deal of overhead, and can, in some cases, even create division rather than synergy within the team. After a couple of quarters of working with Conner Partners, one client leader said to us, "I know I can trust you guys. You've shown me you're here to work with me, not against me. We don't need all this contractual stuff to legislate our relationship. We don't need to put 20% of your fees at risk. Let's just agree that going forward, you'll continue to support me as you always have, and I'll continue to pay your fees." This client realized we would tell him the truth, that we would devote ourselves to his success, and that he could trust us. He has deepened his partnership with CP over time, to the point that he has a personal mentoring and coaching relationship with Daryl; and his success within his own firm continues to rise.

### **Communities**

CP is committed to making a positive contribution in the communities we serve. We give to others through a comprehensive offering of our money, our time, and our professional expertise. Compared with our peer companies, our CIP is not all that unique; nevertheless, we hear feedback from recipients that, "There's something different about you."

The local coordinator for the Salvation Army Angel Tree Program, where our entire firm has volunteered for the past two years, said, "We've never had corporate volunteers bring as much energy and commitment to quality to this work, or derive as much joy from it as you do."

The families of our consultants are another of our communities, and we are committed to honoring them for the support they offer that enables us to pursue our professional and spiritual paths. One of our consultants was deployed in Iraq for the past year. During that time, the firm rallied around his family by providing frequent flyer miles and hotel points so the family could visit during his pre-deployment training in another state; going *en masse* to the airport with water and handshakes to see his unit off; planning birthday outings for the children during his absence; volunteering to help with repairs and chores around the house; sending monthly care packages to Iraq; and including him in the daily email SOC reminders, monthly SOC calls, and other virtual events. Recently, his wife wrote to him saying, "I am humbled and amazed by the support we've received from Conner Partners in your absence. I didn't realize I had any learning to do, yet this experience has taught me how to really be part of a community and accept help from others."

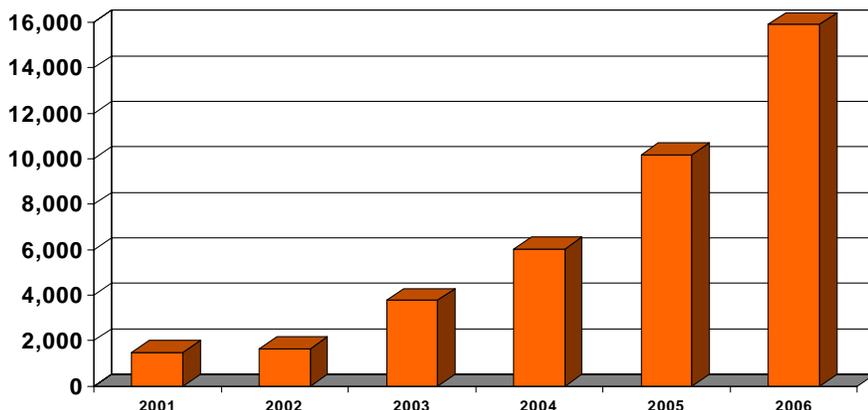
For us, these community activities are not an obligation, but rather an opportunity to fulfill our essential purpose, which is to serve.

**a) What has been the effect of policies, programs, or practices on nominee’s business success? Please say how you feel these programs have helped you. For example: Has it contributed to growth? Has it improved employee retention? Please provide statistics whenever possible. (minimum of 1000 words)**

While we do not go to market with SOC as an explicit part of our customer value proposition, we believe that living SOC contributes to the experience of working with us.

This manifests itself in multiple dimensions:

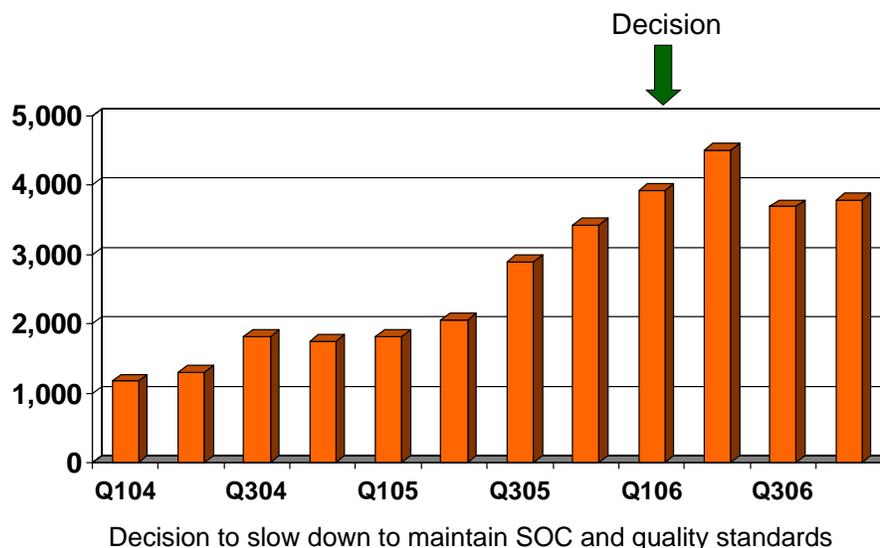
- During the sales process, the application of SOC results in a level of directness and explicitness in the exchanges with our clients that contributes to building trust and puts us on the path to becoming trusted advisors to our clients senior executives.
- In particular, we apply a “Promise Partnership filter,” which helps us determine which clients are likely to benefit from our services, and which would be “bad business.” This is particularly powerful when we candidly share the results of this assessment with our clients, and further contributes to establishing trust.
- Our work involves advising senior leaders on disruptive transformational change and, as such, always requires us to share bad news at some point in the process. The application of SOC results in the sort of presence that allows us to effectively play this alert role and truly reframe our clients to believe that, in status reporting, “red is good.” Our consulting style, based upon “passionate neutrality” consists in always telling the truth while keeping our clients in control of their decisions and ultimately of their success.
- This trusted advisor relationship with the senior sponsor of a major change is critical to the success (realization) of their initiatives. Given that we have a significant percentage of our revenue at risk (20%), achieving full realization is critical to our financial success. For the past four years, our realization performance has averaged 98%.
- The strength of our relationships with sponsors also creates a level of reciprocal commitment that results in multi-phase projects: When we start in the first phase of our methodology, we are engaged in most cases for the entire life cycle of the initiative, resulting in multi-year, multi-million-dollar engagements.
- This sustained commitment by sponsors has been the primary reason behind our revenue growth and our financial success.



Revenue Growth 2001-2006

We have made a commitment as a firm to grow quickly, while respecting our commitment to live SOC and meet our quality standards. Living up to this commitment required us to slow down our growth early last year to avoid compromising our culture and quality, as our growth to exceed our ability to maintain our standards.

Our commitment to SOC gave us the courage and the discipline to make the tough call to slow down and build more infrastructure, and invest more in our Intellectual Property and our people. Because of this SOC-driven decision, we put a ban on new sales in March 2006, and only resumed selling at the end of 2006. As a result, our revenue slowed down, but we were able to avoid serious business pitfalls. We are now much stronger and better prepared to engage in a new growth phase. Therefore, SOC is both a contributor to business growth and profitability (revenue, realization) and a protection mechanism against excessive focus on growth alone, thus allowing us to build sustainable success.



While SOC has a visible impact on our client success, it is just as important for the management of our people. The overall voluntary attrition at CP is very low. Our annualized voluntary attrition last year was 5%, well below the industry standard. This unusually high level of retention has obvious benefits, including return on training investment, continuity of client services, and increasing average depth of expertise with tenure.

A critical motivator to stay with the firm, based on employee survey results, is its unique culture. Our people believe we are serious about applying and living SOC and know that this unique environment is difficult to find in other firms. While it is not easy to live by the standard of SOC, those who join the firm overwhelmingly do so because of this very challenge and the growth opportunity that it represents.

In addition, even if and when people realize that this may not be a fit for them, some elements of SOC (telling the truth, feedback, alignment with purpose) allow us to have a mature and positive dialogue about leaving the firm for a better fit elsewhere. Most people want to stay at CP, but those who leave or are coached out retain strong close and positive relationships with the firm. In fact, many of them have requested to remain connected through our daily SOC reminder emails and/or periodic calls with members of the Executive Leadership Team.

Perhaps the most satisfying effect of the combination of SE and SOC on our business success is best described in the story of a recent training session Daryl conducted with the

senior level sponsors of a major pharmaceutical company. Just six months earlier, we had received scathing feedback from this team about the value of the training and our work in general. After months of active resistance and dysfunctional behavior from most of the leadership team, a mindset shift finally occurred. Tremendous positive energy was released as team members began to share the impact the training is having on their professional effectiveness as sponsors, and for some, their personal lives. The turnaround was so extraordinary that the initiating sponsor has agreed to partner with Daryl to chronicle the story. The level of trust the client now has in our methodology and our SOC has ensured that CP will be working with this company far into the future.

**a) How has the organization been a model or inspiration for other companies in your industry or outside of it? For example, is your CEO often asked to speak at industry conferences and does he or she speak explicitly about spirituality? (minimum of 500 words)**

The CP leadership team made a conscious decision early to keep the open expression of the spiritual component of our SOC philosophy internal. While our clients and community often see a difference in “who we are,” we were not explicit in promoting our intentions to people outside the firm. As mentioned earlier, a secular version of our SOC document (the *Conner Partners Consulting Philosophy*) is what we share with our clients. However, as we have continued to grow and establish longer-term relationships with our clients, we have found an increasing interest in the kind of culture we have established at CP.

Because of this interest, we have begun to explore appropriate ways to speak to Conner Partners’ spirituality. There are now four points of reference related to how we have been informative (if not inspirational) for other organizations in this regard:

- Daryl was asked to deliver a presentation to the Instructional Systems Association last year describing our SOC work and the impact it has had on our business (ISA is comprised of owners and senior officers of consulting and training companies). This was in conjunction with Conner Partners receiving ISA’s Business of the Year award (the award selection committee said that a major factor in awarding us this designation was the distinctive nature of our SOC endeavor). Many of the members who were at that presentation have subsequently contacted Daryl to talk further about what CP is doing and to seek his guidance about how they might pursue similar efforts within their own organizations.
- Earlier this year, an article was published in MOTTO magazine (Appendix C) that featured the “boundary protection” element of our SOC aspiration. Since its publication, several people have contacted Daryl to ask for more information. (Some have engaged in lengthy dialogue about the boundary protection challenges they face in their own organizations.)
- Two years ago, Daryl and Jatin DeSai co-hosted a gathering at the CP office for leaders actively engaged in integrating spirituality into their business operations. It was a very successful event in that it provided a forum for exchanging information and perspectives related to both the progress and challenges these leaders were facing. In the dialogue that occurred, Daryl was able to help others better understand the rewards and struggles associated with this kind of endeavor.
- Because of the three items above, Daryl is now frequently asked by other executives (peers in other consulting firms and clients alike) to share “lessons learned” from his experience.

5. Stakeholder References

**A minimum of two references are recommended. Stakeholders may be owners, employees, suppliers, customers, strategic partners, community representatives, or environmental representatives, who are not leading your Spirit at Work initiative but can attest independently and genuinely to at least one of these:**

- **Vertical and horizontal dimensions of Spirituality demonstrated by the organization**
- **The explicitly spiritual project, policy or practice being acknowledged**
- **Any impact this person/group has observed resulting from the organization's Spirit at Work program, policies, practices, etc.**

**Please include name, contact information and the relationship to the applicant.**

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Conner Partners  
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Mobile: 917.445.0127

Jana Miles  
Director  
Conner Partners  
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Janice Ryer  
Editor  
Conner Partners  
Mobile: 404.663.4390

Mark Hefner  
Senior VP of Consulting Services  
Conner Partners  
Mobile: 678-525-6445

6. *Sources of additional information on the applicant:*

**Here you may mention documents which you attached to the email containing this application but which are not part of this 12-page application. You may also list websites that can be accessed by the committee if needed.**

- Strength of Character document
- Conner Partners Consulting Philosophy
- MOTTO article
- <http://connerpartners.com>

#### **IV. Submitting an Application**

**Applications shall include the information requested above (see Items #1- 6) and can be submitted via email to: [elisa@spiritatwork.org](mailto:elisa@spiritatwork.org)**

**The Committee members reside on multiple continents and cannot share paper documents. For this reason, only electronic submissions will be accepted. Additional support material, such as copies of the Mission Statement, descriptions of specific programs, or articles about the spiritual practices of the organization must also be submitted electronically.**

#### **V. Receiving the Award**

Organizations receiving the Award must be willing to contribute to some of the activities that promote and raise awareness off the award, such as:

- Agreeing to attend the 2007 International Spirit at Work Awards conference to receive the award and to offer a workshop presentation on their programs and/or practices. The 2007 Conference will be held at Simpsonwood Conference Center, Atlanta, Georgia, USA on October 19-21<sup>st</sup>, 2007. You must attend the conference and offer a workshop in order to receive the Award and to be considered an ISAW Honoree.
- Providing a 1 page overview of your best practices for our Program Book and a 10 page overview of best practices for the attendees of the award ceremony and for the websites of the sponsoring organizations
- Signing a release form that grants permission for your case study to be included in ISAW publications
- Signing a release form that allows us to videotape and audiotape your presentations.
- Willingness to be contacted by researchers, journalists, and like-minded organizations to share what you are doing
- Agreeing that your application can be made available to future applicants and to journalists and researchers who are writing positive stories or work about spirituality in the workplace.

## VI. Application and Award Schedule

Due Date for nominations is May 1, 2007 for the 2007 awards. **The application form needs to be submitted in English. Decisions will be communicated to all applicants by the end of July. At the present time, we do not have enough funding to allow us to pay travel for honorees. However, we will waive the conference fee and pay the retreat expenses for one representative from each of the organizations honored. Award recipients will be profiled in co-organizers publications and on their websites and at their conferences. In addition to a few former award recipients, the Selection Committee of the ISAW Awards is currently composed of members from following non-profit organizations:**

- The Association for Spirit at Work: **“The professional association for people involved with spirituality in the workplace”** [www.spiritatwork.org](http://www.spiritatwork.org).
- The World Business Academy: **“Rekindling the human spirit in business.”** [www.worldbusiness.org](http://www.worldbusiness.org)
- The European Baha’i Business Forum: **“Enhancing the well-being and prosperity of humankind.”** [www.ebbf.org](http://www.ebbf.org)

## VII. Who was Willis Harman?

This award was inspired by the work of Willis Harman, PhD (1919-1997) who was a visionary thinker, futurist, and social scientist who continuously articulated the possibility for humankind to transcend the limits of out-moded thinking. He was the author of several books including *Creative Work: The Constructive Role of Business in a Transforming Society* (with John Hormann), *An Incomplete Guide to the Future*, and *Global Mind Change*. He was co-editor of *The New Business of Business: Sharing Responsibility for a Positive Global Future* (with Maya Porter). He was also co-founder of the World Business Academy (1988), president of Institute of Noetic Sciences from 1973 until late 1996, a social scientist and futurist with SRI International in the late

**1960s and early 1970s, and a professor at Stanford University prior to these other affiliations. This award honors organizations who are living examples of Willis Harman's vision that business will play a major role in transforming social consciousness.**

For further information contact:

**Elisa Mallis**

**Chair, Selection Committee, 2007 International Spirit at Work Award**

[elisa@spiritatwork.org](mailto:elisa@spiritatwork.org).

## **VIII. ISAW Application - Frequently asked questions**

**Q: Can my organization apply if it is faith-based?**

**A: You may apply as long as you are not promoting any one faith tradition. Honorees must respect all faith traditions and not use any Spirit At Work initiatives as a way to convert others to their preferred faith.**

**Q: Can my organization apply if it is based on the spiritual teaching of one person or is a religious organization such as a church?**

**A. No, we're sorry. We are looking for organizations that will serve as acceptable models to the broadest type of business organizations, and we believe that an organization that focuses on the teachings of one spiritual leader or is promoting one particular religion may not be easily accepted by mainstream organizations as a model. At the same time, we recognize that these kinds of organizations are often on the leading edge of spiritual practices in the workplace.**

**Q: What kinds of organizations can apply?**

**A: For-profit, not-for-profit, educational, or governmental organizations may apply. Privately held companies may apply. Publicly held companies may apply. Universities may apply. Basically, any group of 20 or more full-time, paid employees (or full-time equivalent) who meet the criteria listed in the application form can apply.**

**Q: Can I count volunteers as part of my employee count?**

**A: Generally not, and here is why: Work is generally to make a living and pay the bills. Therefore, this kind of work is done in return for pay. Work-for-pay creates the potential for inconsiderate treatment of workers who may feel trapped. We are trying to promote change in the workplace so that our time at work is nourishing to our Spirit. Volunteers who are mistreated can easily leave. Thus, our focus is on paid employees. However, if you have a special circumstance, contact us so we can consider your eligibility.**

**Q: My entire organization at large is not yet involved with Spirit at Work initiatives, but my Division has a great program. Can we apply?**

**A: Yes, as long as your Division has at least 20 full-time employees, has been in existence for 5 years or more (3 for small organizations), and has a reasonable degree of autonomy (decision-making authority) in regard to this project.**

**Q: Our project has been a pilot project within our larger organization. Can a pilot project apply?**

**A: Yes as long as your organization meets the other criteria and the leadership of your organization has approved this pilot.**

**Q: Do some types of organizations or organizations in particular countries/regions have an advantage?**

**A: Some types of organizations or organizations in particular countries/regions may be thought to have an advantage, both through having more experience of practicing spirituality in the workplace and where English is their first language. However, we have developed an approach that allows for all applications to be fairly considered in both the business and cultural context from which they are presented.**

**Q: Are there any restrictions on the types of organizations that can apply?**

**A: No—any organization can apply, with the exception listed above, and they have more than 20 employees. We do not exclude from consideration any organization based on their product or**

service. If an organization's product or service could be considered harmful to society as decided by the Selection Committee, then there will be an obligation for the organization to demonstrate that their overall vision/mission/values are aligned with compassion for the concerns and needs of every stakeholder—including but not limited to employees, the environment and the community.

**Q: What could cause my organization to not be selected for an award?**

**A: If you do not meet the criteria specified in this application OR If the Committee feels there is any inappropriate behavior in the organization, such as attempts to convert employees or unethical behavior OR If the Committee feels that the greater purpose of the International Spirit at Work Award is not served by naming your organization as an honoree**

**Q: Can my organization be a sponsor (donate money or services) to the award in the same year as we apply for an award?**

**A: We would welcome your support but we're afraid we cannot accept donations in the same year as an application. If you have already donated in the same year, your contribution will be refunded. We want to avoid any conflict of interest—or even an appearance of a conflict of interest. Most of our donations for the awards and for the conference come from ISAW Alumni, so if you have received the award in the past, we welcome your support through donations or services.**

**Q: Does my organization have to be present at the conference to receive the award?**

**A: Yes—since it represents a visible commitment of senior management to the Spirit at Work initiative. A photographer will be present, and possibly representatives of the press, so the Award Ceremony is a good opportunity for the organization to gain favorable recognition.**

**Q: Can I see some applications from prior honorees to get an idea of what other organizations have done?**

**A: Yes, several previous award recipients have made their applications available. Check the website [www.spiritatwork.org](http://www.spiritatwork.org) to see if they are posted. If they are not yet there, contact Elisa Mallis at [elisa@spiritatwork.org](mailto:elisa@spiritatwork.org) to request some sample applications.**

**Q: Do I have to model my application after previous year's applications?**

**A: No. We want to encourage a creative and authentic description of the uniqueness of your organization's policies, procedures, or practices that nurture the human spirit. We want you to tell your own story in your own words. However, you may consult previous applications to be inspired by the way Award honorees have filled out the application**

**Q: Can I get some help as I am working on my application? I have some questions and I want to be sure I present the information you need.**

**A: We are happy to help you complete the application process. However, this is not necessary to be successful as an applicant. We will contact all applicants to clarify items in the application—so getting help in advance is available but optional. Contact the Chairperson and a Committee member will be assigned to help you through the application process. If you have a noteworthy program or practice, we WANT you to apply! Let us help!**

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