The Open University

Step-by-step engagement guide: working with SMEs using values

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Introduction

This engagement guide focuses on face-to-face visits with SME owners and managers, which may be taking place for a variety of reasons, such as a site tour, an energy audit or simply an informal meeting. The guide complements the insights presented in the Effective communication guide, and is split into three sections, which cover some of the key values-related issues that you may wish to consider before, during and after your visit. Simply click on the title or image in each box below to examine the relevant stage of the engagement process in more detail.

Before a visit

During your visit

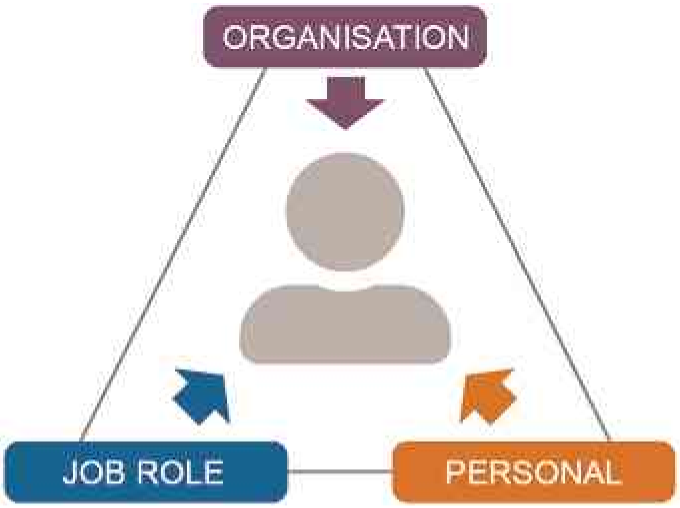
After you've left

Before a visit

All advisors will conduct preparatory research and planning before meeting with an SME. Part of this is regular technical preparation. For example, in the case of low carbon advisors, you would be considering what the major sources of environmental impact, and what the most cost-effective opportunities for savings are likely to be.

In addition, you can use the pre-meeting stage of the engagement to do some initial research on the competing values you are likely to encounter, and start thinking about how you might bring values into play in order to achieve a more successful outcome.

When it comes to engaging with business, we can encounter values from three distinct sources (Figure 1).



Organisation

All organisations have distinctive cultures and values. These may be linked to their sector or geographical location, the socio-demographic makeup of their staff, or even the personality of the owner-manager. Organisational values influence the relationships with staff, suppliers and customers.

Job role

Many job roles reward particular sets of values and attitudes. For example a finance or risk management role may require a steady or cautious approach, or a business development role may be best filled by somebody who is naturally outgoing and thrives when meeting new people.

Personal

Our personal values are deeply held on an emotional and sometimes subconscious level. They might be strongly influenced by our upbringing, and are likely to be reflected in our relationships with others. These values influence how individuals perform in their job roles, and how they engage with broader organisational cultures.

Figure 1 Values in the workplace

These three sources of values are constantly interacting. For some individuals, the three sets of values might be in perfect alignment, while for others there may be conflicts and tensions at play. These can make it difficult for advisors coming from outside. Nonetheless, understanding the values of your audience, and tailoring your message to speak to those values, can help advisors to be more effective in their work.

The table below helps you to think about what competing values might be at play in the impending meeting, by separately considering the organisation, the role and the individual (Figure 1).

The organisation	• Does the client website have a mission statement or refer to any stated values (e.g. Customer service or local sourcing)? Is there a public environmental or corporate social responsibility (CSR) policy? • Does the organisation have any environmental certifications (e.g. ISO14001, or badges from organisations such as the Carbon Trust? • Who are their main customers and suppliers? What kinds of pressures are they likely to be experiencing from their supply chain? • What is the legal status (e.g. Partnership, family-owned private company, public limited company)? • Who has control/what are the main power relationships? (e.g. Is control highly centralised?) Control may be evident from the company website: do they list their directors? Is the company split into distinct management divisions? • Have there been any significant developments in its recent history? Look for signs of change such as transfer of ownership, new products or services developed, or commercial, legal or reputational issues.
The job role	• Does the job title of your contact give any clues to what their professional priorities may be? • Are they a member of a trade or professional body? • Do you have experience of meeting with somebody with a similar job title elsewhere? Remember that all organisations will have different cultures, but there may be some common responsibilities and pressures associated with this role.
The person	• Has your contact person posted any information on a social media site that gives an indication of their personal values? e.g. LinkedIn, Twitter, Facebook. • What is their educational background? (For example, if they went to university, what they chose to study might give a clue as to their interests.) • What path has the individual's career taken to date? (For example, have they taken on different roles in the past that might influence their values? Is their current role related to their educational background?)

Remember: people can be surprising!

You can do all the research possible, and the conversation with an SME can go in any number of ways. It's human nature to make assumptions about people based on things like name, job title and appearance. Challenge the implicit assumptions you've made and keep an open mind going into your engagement.

During your visit

Bearing in mind the three distinct ‘levels’ of values as described earlier, in your engagement with the SME ask questions that relate to each in turn.

Do…

- Ask open questions and listen carefully to gauge the values that are important to the organisation, the role or the person. As well as asking about near term plans and aims, ask where they see the business in 20 years. What impact on the world would they like the business to have had? Prompting reflection on this question can relate to the sense of responsibility and duty to future generations
- Ask obvious questions during any site tours and when shown energy-using equipment.
- Speak about widely held concerns regarding wastefulness when using resources, including energy.
- Be honest and authentic when talking to your clients, and relate to your own values where possible.
- Offer to help support the business in ways besides environmental impact.

Don't…

- Focus exclusively on the financial case for energy efficiency.
- Assume conventional 'environmental' language will work.
- Be afraid to ask direct questions:

  Has the business considered its environmental impact?

  Do you think that climate change will affect your business in the long term (for example through your supply chains, increased prices for materials and energy, changing customer preferences, or new legislation)? This approach relates to concerns about image and social inclusion – no one wants to think of themselves as contributing to the problem rather than to the solution.
- Suppress your own values and priorities as an environmental professional. The client may not share your values, but by demonstrating integrity you can ensure they respect yours.

During your meeting you will hopefully manage to roughly gauge the kinds of values that motivate your client. Once you have done this, you can begin to introduce the ideas and words that will mostly likely resonate.

For instance, if you think that the values of 'stimulation' and 'self-direction' are motivating, then discussing the speed of technological advancement in the energy sector, or other eco-innovations may resonate. Alternatively, if tradition and security appear to be fundamental values for your client, then using language relating to resilience, responsibility and long-term legacy may be more effective.

After you've left

As a matter of course, advisors will follow up their meetings with SMEs by running some calculations, writing up meeting notes or producing a report.

In addition to these, be sure to follow up on some of the values-based insights garnered during the meeting. For instance:

- Is there an environmental business network, either locally or nationally, to which you could refer the SME?
- Have you worked with a business or an individual in the past that is similar to this client? For instance, they may occupy similar buildings, have similar supply chain pressures or they may share certain sets of values. SMEs respond well if they can see examples of similar organisations taking pro-environmental action.
- Share on social media the fact that you have been out to see the SME to discuss ways they can reduce their environmental impact. This should be subject to client permission, but SMEs usually welcome this kind of publicity.

Reflect on your experience of trying to bring values into play. For example:

- Which particular words or approaches seemed to get a good response from the client?
- Did you find it straightforward to steer the conversation towards the 'bigger' questions of the business's values, or its long-term purpose?

- Did you achieve a good level of rapport with the client? If so, what was it that led you to ‘click’?
- Imagine what the ‘perfect’ advisor would have said and done in the situation you found yourself in. Is there anything you can learn for next time?