



Leader Profile

PAULA ROBERTS

CEO, HALO Brand Leadership

with **GLAIN ROBERTS-McCABE**

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THE EXECUTIVE
ROUNDTABLE
Great leaders make the difference

with **GLAIN ROBERTS-McCABE**



*Master communicator **Paula Roberts** is a passionate brand builder and advocate for corporate citizenship. With a notable track record in both the private and not-for-profit sectors, Paula has brought her marketing savvy and strategic insights to a number of high profile initiatives including the “Because I am a Girl” campaign—a game changer for Plan Canada. Paula is now sharing her expertise through her company, HALO Brand Leadership, in an effort to help more not-for-profit clients differentiate themselves in a crowded marketplace. She sat down with Executive Roundtable President **Glain Roberts-McCabe** to share her perspective on making career transitions, building your professional profile and finding meaning through work.*

GRM You’re currently the owner of HALO. Tell us a bit about your firm and the journey that brought you to self-employment.

PR HALO has been some time in the making and has been purpose built both to serve a clear need in the market and my own passion for driving meaningful change. In a nutshell, **HALO Brand Leadership** is for brands at the intersection of “doing good and delivering results.” For not-for-profit organizations, we develop compelling brand strategies, marketing plans and change management initiatives that create unstoppable public engagement and support fundraising campaigns that motivate donors to dig deep. And, for the increasing number of for-profit marketers who

understand that consumers want to see what an organization truly stands for, HALO makes corporate citizenship a strategic marketing asset and a unique point of difference.

My career started in marketing at Xerox Canada and then transitioned to a variety of different marketing communications agencies from owner-operated shops such as Roche Macaulay, to global agencies like TBWA/Chiat Day. After a decade and a half working in client service and agency leadership on brands ranging from Apple to Mercedes-Benz and Federal Express to Absolut Vodka, it was time for a change. I was recruited to SickKids Foundation after having volunteered as an advisor to their corporate fundraising team for a number of years. The role was their first ever Vice President of Marketing and I could not have imagined a more compelling opportunity to be a client and bring this beloved brand to market in a more dynamic way. I thoroughly enjoyed the chance to use my skills to create positive change and from SickKids went to Plan International where my focus evolved from kids here at home to children living in extreme poverty in developing countries around the world.

After ten years serving two of the largest not-for-profit (NFP) organizations in Canada, I noticed that there were lots of NFP organizations with important missions that could be much more effective in their fundraising and engagement efforts if they took the time to ensure that their brand was relevant to the public and differentiated from a huge and growing group of competitors. I was fortunate enough to have an amazing network of gifted professionals who I met over the years and they joined me to form HALO in January 2015. I love being my own boss, working with clients that are doing such important work and on a wide range of topics.

GRM You've transitioned from agency life to not-for-profits and now to entrepreneurship. Which transition was the biggest leap and why? What have you learned about career transitions through this process?

PR My biggest leap might surprise you as it was from SickKids to Plan Canada. I suspect that most people would expect me to say from corporate to NFP or from NFP to self-employment but the reality is that the jump from an organization and an issue that everyone knew (paediatric research) to an organization that champions a cause much less immediate to Canadians (child rights in the developing world) was a huge leap as a marketer. International development is a cause that just 8% of the Canadian population is funding. Relevance was something that, up until I went to Plan, had been relatively easy to establish on the brands I had worked on. The bar was suddenly much higher in terms of what was required to be successful. Not only because so few Canadians considered the work Plan does as a priority but also because the brand name itself was known by so few following the name change from Foster Parents Plan. I had worked on big brands before—everyone knew them and people cared about them for one reason or another. This time I had to find another way to establish relevance and motivate people to personally engage—and of course that is how “Because I am a Girl” came to be. Very different challenges, budgets and priorities made for a very big transition.



In the process, I learned that the most important aspect of any successful career transition is to do your research and actively prepare for the change. Know what you are getting into and what success looks like in advance—this will help you focus on the right things even in unfamiliar territory. Embrace the inevitable uncertainty and look at it as a way to stretch yourself but don't jump in blind. There is a right time for change and transition of any kind takes a certain amount of energy and commitment. You have to understand what is required if you expect to be successful and determine if the time is right for you to make the leap. What other things are going on in your life? Are your partner and family prepared to be supportive? Are you healthy and able to spend the extra energy required to make a transition? How will you need to build out your support network to allow for the time you need to invest? Don't just assume that these things will take care of themselves—consider them in advance.

Leadership Tip

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GRM You've made the decision to focus on social impact and, as part of that, corporate citizenship. How did you come to choose this for your focus? What is it about this cause that resonates with you? What advice can you offer to people who are looking for ways to connect with their own purpose and find more meaning in their careers?

PR The truth is that I first became engaged in not-for-profit and social impact because the business problems facing the sector and the associated implications were much more complex than selling a traditional product or service. Getting people to engage with an NFP demands that you connect with them at their deepest subconscious level. Maslow calls it self-transcendence—where an individual wants to give back or give to something that is bigger than themselves. Nobody has to give money to charity—there is

always something else to spend it on. So the point of connection with donors, supporters, and consumers must be more elevated than a physical or an emotional need. This kind of marketing needs to resonate with users functionally, emotionally, and even spiritually and I love the challenge that comes with that. That's how I initially was attracted to the social impact realm but shortly thereafter I was "bitten" by a love for the sector. I felt more alive and engaged with the world spending my energy on the issues that so many believe they just can't influence. The truth is that we can all influence the lives of others to the positive and I truly enjoy helping individuals and corporations see how that is possible.

In terms of advice, I would encourage people who are looking for "more meaning" in their careers to do their homework. What does "more meaning" actually mean to them? Many folks come to me thinking that working in NFP or social impact will be a cure-all for everything they don't enjoy about their work but it's not that easy. You need to understand what feeds you and seek out a cause, an organization and a leader who will deliver against what you are looking for. I encourage people to create a list of the 10 characteristics of their dream job. There are no limits on what can be included on this list—it can be anything from the influence you will have on a significant issue, to the number of people that report to you, to the location of your office. From there,

Leadership Tip

The first step to finding a "meaningful" career is to figure out what that means for you and how that fits with your other priorities for a dream job.

rate each characteristic so that together the 10 items you have listed total 100 points. This creates priorities and a "shopping list" of sorts that you can use to find your dream job. This isn't an easy

exercise. It takes time but it will also make clear what you value and where "more meaning" fits in your list of priorities. Will you accept

less money for more meaning? Will you drive farther for more meaning? Will you spend less time with your family? All of these things are worth considering.

GRM I think there are a number of misconceptions about leading in the not-for-profit arena. One is that it's easier than corporate life. What advice would you have for someone who's thinking about making a career move into not-for-profit from corporate?

PR If I had a dollar for everyone I have spoken with who assumes that NFP is easier or a great place to "down shift" I would be a rich woman! In fact, in my experience: It's exactly the opposite. The reality is that NFP organizations are typically under-resourced as a result of having to keep costs very low, which means you have to do more with less.

The other reality I have found is that the impact of the work actually pushes you to go harder and longer. When you know that people are dying or suffering daily, it's hard to turn your email off or put off taking action that can drive change. It literally *is* life or death. That is



what makes it so rewarding but, with that in mind, suffice it to say that NFP isn't for anyone looking to "slow down." The sector has become increasingly competitive as more and more organizations are introducing leaders and standards from the for-profit world—so the same rigour but with the added effort required to deliver and impact that is bigger than quarterly results.

GRM You're a master communicator and have fantastic presence. What techniques have you learned over the years about commanding a room and communicating with impact?

PR Well that's a nice compliment—thank you. The truth is that I love the challenge of engaging people in a public forum. It totally charges me up because it is the precise moment when people become compelled to change their point of view and take action. The most important thing to understand is your audience. Why have they gathered and what do they expect as a result of listening to you? How can you convey your message in a relevant way, keeping in mind that your audience almost certainly doesn't understand your topic as well as you do? Tell stories to convey principles or ideologies. People respond to people so be honest and connect with them empathetically, rather than trying to present yourself as better or smarter than they are. And always end every presentation by reminding people how your message connects with them and how they can take action as a result. People are busy and overwhelmed—if they take the time to listen, you need to be relevant, entertaining and authentic. Convey energy for your point of view.

GRM Have you ever had a communication experience that you wish you could get a "do over" on? What happened? What did you learn?

PR I'm not sure that I can reference a single "do over" experience but I have had challenging business relationships that have resulted

Leadership Tip

Not-For-Profit is *not* the place for a career downshift.

in evolving my communications approach. I am a passionate person and that has typically stood me in good stead—particularly in the world of NFP and corporate citizenship. But there are some people who don't respond well to that passion and, in some cases, these individuals actually become aggressive. I have learned to consider this possibility in advance and in those instances to “dial it down a bit” but that can be hard since this intensity is part of who I am. I suspect this will continue to be something that I will have to work on for a while and may never totally master but here are a few key considerations that have helped to guide me:

Take a deep breath. I think that for people who are authentically passionate, who really believe in what they're speaking about, often what you have to say is right at the tip of your tongue. So step one is just as simple as slowing down and “taking a breath.”

Know your audience. Good marketing always starts with knowing your audience. You can't sell them something that they aren't interested in buying and that goes for your viewpoint too. So if you suspect that they may not be wholly receptive to your view or your approach, you need to contemplate that and make adjustments. In particular, if the person you are speaking to holds more power than you do, you should anticipate the way they best absorb information and speak to them as works for them versus defaulting to your usual. This may take some effort versus just going on auto-pilot, but you will be more successful in the end.

Start with the facts. Speak very specifically, and give examples. Lead with the facts and then ladder up to more passionate declarations.

As long as you've respected the way your audience processes information and put your fact-based case forward first, you can be passionate in your conclusion and your authentic personality will still be reflected and reach your desired end state.

GRM What's the biggest mistake you see people make when it comes to trying to get their points across?

PR All too often, I see people speak from their own point of view without giving their audience's point of view the respect it's due. Particularly in NFP, people can be so passionate about their cause that they automatically assume others will share that passion—but that's just not the case. You must take the time to build a case for why people should care or act based on their reality, *not* your own. I would say that one of the most important things I can do for my clients is help build their case for relevance through an authentic brand voice. People want to support causes they feel genuinely connected to and proud to call "their own" and I would say that this advice is applicable for those working in corporations and for-profit businesses too.

GRM Now that you're working for yourself, do you miss being part of an organization? What surprised you about self-employment?

Leadership Tip

Knowing your audience and respecting their perspective is the key to effective communication.

PR I guess I have always been a bit of cheerleader and definitely miss shaping and influencing large groups of people in big forums. There is an energy return that comes with that kind of interaction and that was an important part of my organizational life. Of course, the HALO team is growing but it is different—I am building my team one person at a time versus inheriting a large crew. Each person is an extension of my brand and there is a big outlay of energy required to curate that, particularly in the beginning.

I'm not sure that any part of self-employment was a surprise, as I had contemplated it for a long while and I am married to someone who is also self-employed, so my eyes were wide open. That said, the biggest shift from overseeing a team of 50-plus reporting to me is that I have to be prepared to do everything—no job is too big or too small. You have to be able to think and do at the same time and

that can be tiring but it can also be hugely rewarding. It creates a great sense of pride and ownership. The buck stops with me!

GRM I know you're a big fan of personal development. What have been some of the most impactful development activities you've done over your career and how are you keeping your "saw sharp" these days?

PR Perhaps not surprisingly, I think it's key to invest the time and potentially the money in people you can learn from. I have engaged a professional coach in the past and she pushed me in all the right ways, including challenging me to take the recovery time needed to stay sharp versus my natural tendency to keep driving.

One of the things, for me, that can shut down most quickly if I'm running too hard, is the ability to innovate or think outside the box. I've recognized that if I do take that recovery time, the right answer or the more creative answer will come to me more quickly than if I try to force the thought process. I think that it's easier to lose that innovative part of our brain when we're really tired and we also don't necessarily represent our most authentic self.

What I have found helpful is to take advantage of the small opportunities for recovery during busy times. One of the things that came out of my starting my own venture is that, even though I'm still extremely busy, I am able to manage my time in a way that is more flexible. This means I can build in recovery points throughout the day, and not be limited to the time after traditional work hours. I can decide that I'm going to work a morning from home and as part of that, I'll take the dogs for a walk, or I can decide to go to the gym in the afternoon and work client appointments around that. That has been part of what I've enjoyed with this latest chapter in my career but I do think that there are ways for people who are bound to traditional hours to create this space for themselves too. As much as we admire productivity as a culture, we have to be aware that constantly driving towards productivity can come at the cost of creativity and even authenticity.

Leadership Tip

Keep your saw sharp by making the effort to learn from like-minded peers.

I have also kept my development on track through my participation in small professional networking groups of like-minded individuals who coach each other. Listening to yourself talk out loud and taking the time required to prepare for a coach or group of peers, demands that you carve out the time to do the work required to enable your development. Taking this time is essential to forwarding your development because it will not happen by accident. It's like expecting to become physically fit without going to the gym. You can have the very best of intentions but if you don't build in the activities or mechanisms to make it a reality, it just won't happen.

These days my "saw" is kept sharp courtesy of my clients. This is one of the great parts of leading the charge at HALO in that I get to work with a variety of amazing CEOs, CMOs and their Boards every day helping to take their organizations and important causes to the next level. These people are at the very top of their game and have had different experiences and views of how to change the world for the better. That keeps me very sharp! I'm so fortunate that I get to make my living doing this kind of work and grow personally and professionally in the process. **RL**



Glain Roberts-McCabe believes great leaders make the difference and that every leader can be their own kind of great. As Founder and President of **The Executive Roundtable Inc.**, she and

her team inspire great leadership through innovative group, team and individual coaching and mentoring programs.

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