

2016 Annual Members' Meeting

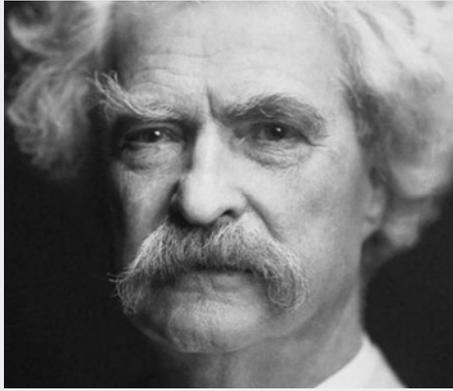
24 February 2016



LAMERG Latin America Employee Relations Group | www.lamerg.com

Practicalities

- Fire exits and instructions
- Los baños/banheiro
- WiFi password - PANAMASEPT
- General support and needs



It ain't what you don't know that gets you into trouble. It's what you know for sure that just ain't so.

– Mark Twain

Our Primary Objective

Support your companies' success in Latin America through our network and programs

April Guidance – LAMERG priorities

- Meetings in the US and in the Region
- Build network to bring transparency about best practices and challenges
- Support developmental programs with a Latin America focus

Agenda for members' meeting

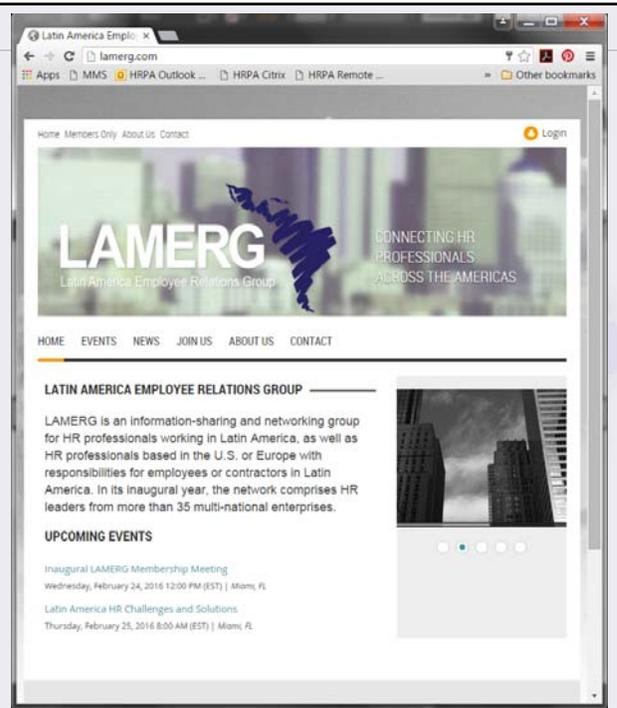
- Meetings and logistics – 2016 (September) and 2017 (Q1 and Q3)
- Website capabilities and how-to
- Training program proposals
- Local network launch
- The name...
- Reception

Proposed schedule and venues

Location	Schedule
Panama City, Panama	27-28 September 2016 <i>Downtown or Costa del Este?</i>
Miami, Florida, USA	January/February/March/April 2017 <i>EPIC Hotel</i>
Mexico/Panama/Argentina/Brazil/other	Q3 2017
Miami, Florida, USA	January/February/March/April 2018

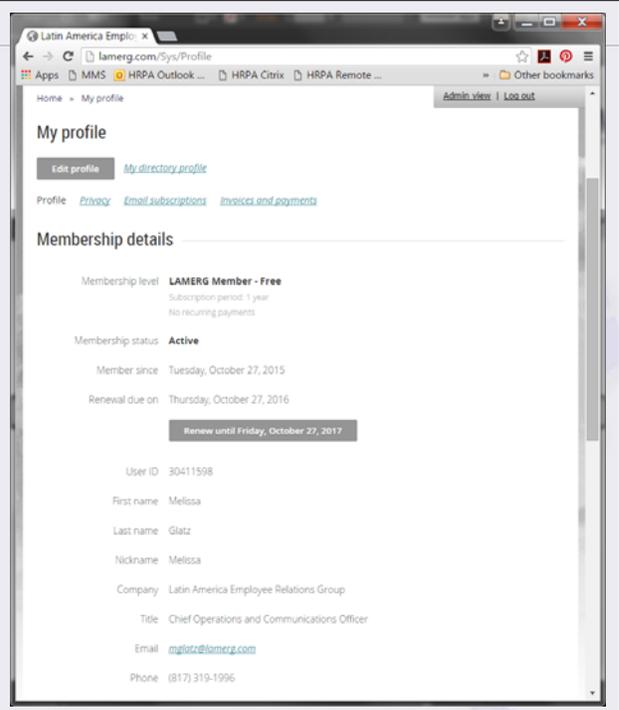
Web site capabilities

- Wild Apricot – membership management system
- Largely self-service, but assistance always available
- Public view vs. Member view
 - Potential tools for member services



Membership Management

- Wild Apricot integrates database and Web site
- Contact information securely stored
 - Currently basic info
 - Could expand to include role/ areas of expertise, locations, industry, etc.
- E-mail blasts
- Event registration
- Known limitations
 - Individual memberships (rather than company) requires admin approval
 - Assistants not automatically included in emails
 - Others?



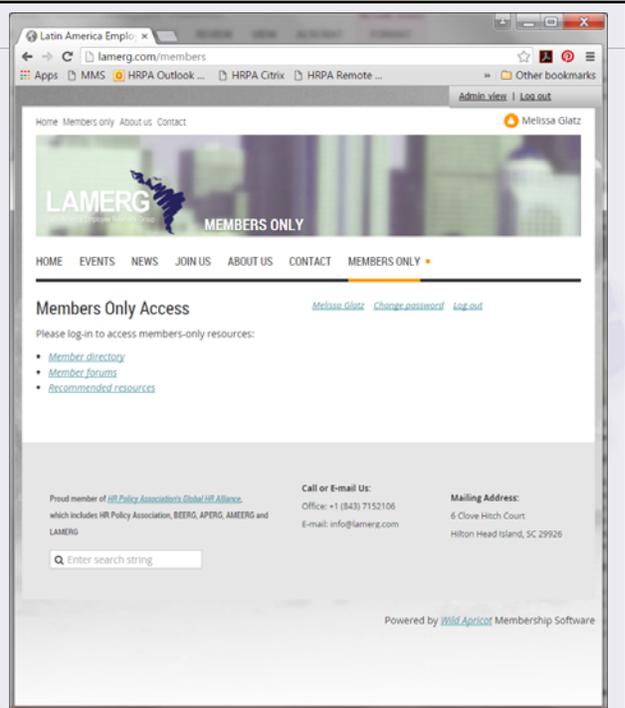
Members Only

Planned capabilities

- Collect/store contact information
- Discounted/free event registration
- Member directory

Potential capabilities

- Member forums
- Recommended resources



Training proposals

1. Recruitment and Talent Attraction in Latin America
2. Latin America Employee and Labor Relations Overview
3. Negotiation Preparation and Negotiations Simulation
4. Leading from the Inside Out – Cross Cultural Leadership

Recruitment and Talent Attraction in Latin America

Target audience and outcomes

- HR professionals and other individuals who are directly involved in identifying, interviewing, and selecting candidates
- Participants will learn and practice skills to source candidates, evaluate resumes/c.v.'s, conduct behavioral based interviews, and better identify truthful answers. They will also learn about techniques to use social media and open recruitment models.

Program outline – 1.5 days

Day 1

- Overview and sharing – current “norms” in Latin America and company environments (especially the power of relationships versus skills and capabilities)
- Direct recruitment, outsourced screening services, external recruiter model (when and how to use them, best practices currently in place)
- Resumes/c.v.'s
 - Screening, bias awareness, and practice using examples to evaluate candidates
- Behavioral-based interviewing
 - Demonstration of behavioral model
 - Panel interview process and preparing interviewers
 - Development of key behaviors and core questions
 - Identifying truthful vs. deceptive answers (new research based on “open questions”)
 - Sharing of “model” process and post-interview scoring matrix and summary
 - Practice interviews and scoring exercise

Program outline – 1.5 days

Day 2

- Social media and market presence
 - View participants' existing profiles and presence
 - Current best practices and examples in the market
 - Company branding and social media expectations
- Recruitment planning and review
 - Develop plan for post-program implementation using actual/expected openings
 - Includes sourcing plan for candidates, draft key behaviors/knowledge, and core standard questions

Program delivery

- Offered either in convenient US locations (Miami, Houston, etc.) or in the Region.
- Content delivered LAMERG and subject matter experts (social media, etc.)
- Audience size – minimum 12 and a maximum of 30.
- Participant cost:
 - LAMERG members - \$1,500 per attendee
 - non-members - \$2,000 per attendee
- Available for delivery “in-house” with a focus on internal company recruitment systems and processes
 - custom pricing TBD

Understanding Employee and Labor Relations in Latin America

Offered jointly by Littler Global and LAMERG



LAMERG Latin America Employee Relations Group | www.lamerg.com

Target audience and outcomes

- Intended for business leaders and human resources generalists who require general knowledge of the Latin America employee and labor relations environment, but are typically not directly engaged in face-to-face negotiations or local union relationships
- Provides general knowledge and insight about high level current topics and themes, and a context for asking local leaders and labor practitioners informed questions as part of employee relations or labor planning activities.
- Supports a network of human resources and employee relations professionals with shared interests and approaches



Program outline – 1.5 days

Day 1

- Overview of major country topics
 - Individual focus on major countries' LR/ER themes (Argentina, Brazil (sectoral and private bargaining), Chile, Colombia, Mexico (especially protective contracts, white, and red unions and variations between states), Peru, Venezuela)
 - General structure and process of labor relations, scope of labor contracts, typical hot issues, and dispute resolution during the contract term.
 - Review of political implications of the widely varying government approach (from “Bolivarian” revolutionary models to openly pro-employer/anti-union)
 - Restructuring, outsourcing and legal constraints
 - Termination disputes and labor tribunals
- Discussion of current/pending attendee issues and concerns

Program outline (continued)

Day 2

- Focus on how to build high engagement relationships with employees and proactive approaches to remaining union-free where that is a viable and legal alternative. Engagement includes use of social media, mobile apps and other techniques.
- Global unions and NGO's in Latin America, and their impact on local employee relations and global brand and reputational risk
- Shared action planning and next steps (as appropriate)

Program delivery

- Offered either in convenient US locations (Miami, Houston, etc.) or in the Region.
- Content delivered jointly by Littler Global representatives and LAMERG (possible member role if desired)
- Audience size – minimum 12 and a maximum of 30.
- Participant cost
 - LAMERG members - \$2,500 per attendee
 - non-members - \$3,000 per attendee.
- Available for delivery “in-house” with a focus on internal company priorities and concerns
 - custom pricing TBD

Littler
GLOBAL

Labor/Employee Relations Negotiations Preparation and Simulation Program

Offered jointly by LAMERG/Bavis Consulting Group



Target audience and outcomes

- Intended for business leaders and human resources generalists who require specific skills and the capability to engage in face-to-face negotiations and local union relationships. Completion of the “Understanding LR/ER in Latin America” program and pre-reading of the case is required.
- Provides insight about contract preparation, contract costing, contingency planning, negotiations techniques, identification and preparation of the management negotiating team.
- Negotiations business case developed to reflect actual events and circumstances – Member company sharing will be needed, and the case(s) will be anonymous. Opportunity for experienced LAM LR expert(s) to potentially join in “union” role
- Provides a meaningful negotiations experience with LR experts portraying the union, and real deadlines and stress events
- Coaching and feedback for participants based on their performance and the outcome.
- Labor Relations Certification available upon satisfactory result

Program outline – 2 full days

afternoon, full day bargaining, morning conclusion and feedback

- Program begins the afternoon after the “overview” program wraps
- Discussion of current/pending attendee issues and concerns Developing the negotiations strategy
- Planning and preparing for corporate campaigns, inside games, external/social media attacks
- Strike contingency planning and developing a strike plan
- Negotiations tactics and techniques.
- Discussion of current situations for participants/group problem solving on potential approaches
- Costing the contract
- Explanation of the simulation case and team assignments
- After dinner: Negotiations kick-off and presentation of union demands

Bargaining simulation day

- Face-to-face and subsequent meeting and exchange of bargaining proposals and table work involving “union” committee
- Unexpected events and “stressors” for the participants
- Final contract offer from management, union response
- Midnight expiration and contract deadline
- If no agreement, trigger simulated work stoppage, media events, customer concern, etc.

Bargaining conclusion (half day)

- If no agreement at midnight, attempt to resolve contract.
- Feedback from “union” representatives on the process, execution of tactics and response to “stressors”
- Costing of final settlement
- Program wrap up and recognition

Program delivery

- Offered either in convenient US locations (Miami, Houston, etc.) or in the Region concurrent with Overview program
- Content delivered jointly by LAMERG/Bavis Consulting Group
- Audience size – minimum 6 and a maximum of 30.
- Participant cost for simulation:
 - LAMERG members - \$3,000 per attendee
 - non-members - \$3,500 per attendee
 - plus incremental travel expense for trainers and “union” reps
- Available for delivery “in-house” with a focus on internal company business case, contingency approach and concerns
 - custom pricing TBD



**LABOR RELATIONS
PROFESSIONAL CERTIFICATION**



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HR Policy Association



LABOR RELATIONS CERTIFICATION COURSES

HR Policy Associations Courses for U.S. labor training, and leading to certification as “Labor Relations Professional”
 Originally by requested by HRP Board in 2000 –”Training by practitioners, for practitioners”

Courses initiated in 2001

Reviewed by 25 company L/R experts before launched, and reconfirmed in 2010

Number of participants to date:

	Courses	Students
Elements of Bargaining	92	1982
Managing a Union Workforce	69	1554
Administering the CBA	54	960
Other, prior courses	20	562
TOTAL TO DATE:	<u>235</u>	<u>5058</u>

Number of participants certified by HR Policy to date: 408

Industries and Sectors Served

- Industrial
- Service
- Defense
- Retail
- Refining
- Oil services
- Pipeline
- Healthcare
- Insurance
- Paper
- Warehousing
- Paint/Coatings
- Automotive
- Grocery
- Soft Drink
- Power Utilities
- Food Service
- Food/Candy Manufacturing
- Consumer Products
- Health and Beauty Products
- Communications
- Motorcycle Manufacturing
- Tires/Rubber Products
- Mining/Mining Equipment
- Glass
- Dairy & Ice Cream
- Heavy Equipment Mfg
- Pharmaceuticals
- Telephone
- Retail Drug
- Grain Processing
- Farm Machinery



LABOR RELATIONS CERTIFICATION COURSES

“ADMINISTERING THE CBA”

One-day course on effectively handling grievances / arbitration process

- Conducting grievance meetings / investigating grievances
- Management’s responsibilities in the process; making it work
- Expanding rights of union if process not managed well
- Disciplinary grievances – most difficult, most likely appealed
- Preserving company’s rights/options at first step of procedure
- Arbitration – Understanding the final step of the process
 - Mechanics and preparation
 - Union duty of “fair representation” -- overstated
- Ending team exercise



LABOR RELATIONS CERTIFICATION COURSES

Case based on mythical company – QComm – in Minneapolis
“How did you know so much about our company?”

Most training done in-house -- inside companies
Combine team building and skill building
Oriented to C/B needs of the company in upcoming negotiations

Three courses to certify as “Labor Relations Professional”

Twice annually, open enrollment sessions for 2016

- | | | |
|----------------------------|------------------------------|------------------|
| April 5 and September 13 | “Managing a Union Workforce” | Washington, D.C. |
| April 6 and September 14 | “Administering the CBA” | Washington, D.C. |
| April 26-29, October 11-14 | “Elements of Bargaining” | Grapevine, TX |



LABOR RELATIONS CERTIFICATION COURSES

“MANAGING A UNION WORKFORCE”

One-day basic labor relations course for HR and Ops management

- Legal foundation for the relationship**
- Structure of represented environment**
- Key players and roles of each**
- Union’s relationship with members**
- Company’s relationship with Union – “Rules of Engagement”**
- Management rights – how to preserve them**
- Sins of supervision**
- Administering employee discipline in union environment**
- Ending team exercise**



LABOR RELATIONS CERTIFICATION COURSES

“ELEMENTS OF BARGAINING”

3 ½-day and night course

In depth review of:

- Legal overview of C/B issues**
- Planning and preparing for negotiations**
- Techniques of bargaining – tools and processes at table**
- Achieving closure**
- Costing considerations / techniques (costing model)**
- Post-negotiations issues / activities**

Intense 30 hour simulated negotiations with QComm union

- All students/participants assigned to 6-person management teams**
- Union “Thug” assigned to each team; “Rover” to assist teams**

Final Review

- Presentation of results to CEO / CFO**
- Final review with “Thugs” – take home lessons**

Leading from the Inside Out Cross Cultural Leadership

Offered jointly by LAMERG and Saltar Consulting



LAMERG Latin America Employee Relations Group | www.lamerg.com

Target audience and outcomes

- Intended for business leaders who are relocating to Latin America from other regions, or within Latin America, to assume new leadership roles
 - Attendees will gain an understanding of different Latin American communication styles and behaviors
 - A personal cultural assessment will be provided via the CultureActive tool and a comparison to the new country (or countries)
 - A Behavior Tracking & Action Plan will be created to support new leader assimilation in the new team and/or country
 - Certificate of Cross-Cultural Leadership which is contingent upon completion of pre-reading assignments, workshop attendance and completion of a follow-up session 3 months post conference



Abstract

The Leading from the Inside Out leadership workshop will improve leaders' cross-cultural skills by demonstrating how culture impacts communication, client and employee relationships, and managerial tactics and strategies.

This training provides participants with insights into their own cultural DNA and that of their new "host" country, and build capabilities to accelerate relationships with employees, clients and customers.

Participants will create a Behavior Tracking & Action Plan to support their cross-cultural work and actions in their new locale.



Program outline – 2 days

Day 1

- Leadership Styles Inventory
 - Discussion of various styles, and examples to visually demonstrate (via video) the associated behaviors and language.
- Learn Your "Why?"
 - Simon Sinek Ted Talk on "How Leaders Inspire Action", breakout on "What/Why/How"
- Culture Context Assessment
 - Using Iceberg Model, critically assess personal and often invisible cultural beliefs, assumptions, identities and privileges in home and host cultures
- Review of results of individual "Culture Active" Survey and Culture Map
- Behavioral Plan – Introduction and examples
- Dinner – Intercultural Team Building Dinner



Program outline – 2 days

Day 2

- Cross-Cultural Challenges Brainstorm – breakout on current/expected events
- New Leader Assimilation Discussion – on boarding, transition planning with incumbent, team and peer relationship planning and actions, communications and performance plans, key client profile and relationships
- New Job, New Country, New World – focus on relocation and stresses for partners and/or family. Identification of potential resources and support mechanisms and other logistics
- Behavior Plan Completion & Debrief

Program delivery

- Offered either in convenient US locations (Miami, Houston, etc.) or in the Region.
- Content delivered jointly by Saltar Consulting and LAMERG
- Audience size – minimum 10 and a maximum of 40.
- Participant cost:
 - LAMERG members - \$2,500 per attendee
 - \$3,000 for non-members
 - includes meals, conference activities/assessments
- Available for delivery “in-house” with a focus on internal company policies and programs
 - custom pricing TBD

Missing program - Latin American Talent and Leadership Development

- Conversations with several member companies and potential delivery partners (all have conducted internal programs in Latin America)
- Takeaways – two basic responses from companies:
 - These topics touch on our core values and processes, and we prefer not to participate in an externally offered program (most typical answer)
 - We have real concerns about leaders in emerging markets, and are looking for ways to help them elevate and build skills to present their ideas and people in ways which our corporate culture will better accept (minority view)
- Question for members - Should we develop and deliver a program to address this potential need? If yes, is the target audience current leaders or emerging talents?

For each proposed training program...

- Do the contents address a real need in your organization?
- Do the intended outcomes give you confidence in supporting this within your company?
- If so, how many people do you expect to be participants?
- Is content delivery in local language important?
- Where should the program be offered to get the best participation?
- Any specific suggestions, observations, or concerns about the program design or approach?

2016 Annual Members' Meeting

24 February 2016



Local Networks

Concept

- Support small informal, local gatherings/dinners for HR leaders (and professionals?) of member and “like-minded” companies on a regular basis.
- Inspired by the HR Policy Association local dinners for CHROs.
- We are not trying to compete with or replace existing local associations if they are already in place and meeting your needs.

Potential Locations

In region:

- Mexico City, Monterey, Panama City, Bogota, Santiago, Buenos Aires, Sao Paulo

In USA:

- Miami, Charlotte, Chicago, Denver, New York/New Jersey, Minneapolis/St. Paul

Local networks – table discussion – 5 minutes

Should we proceed?

If yes, where should we start to confirm the concept – Suggestions for top 5 cities either US or in Latin America (show of hands in open session)

Are you willing to host?

New initiatives?

- Benefits community
- Compensation community
- Talent and training community
- Social responsibility
- Others?

Our name...

LAMERG (Latin America Employee Relations Group)

- “Could you find a worse name? LAMERG is just UGLY”
– VP, Global Labor Relations (Major industrial company and member)
- Family member – “I get it... Lame RG!!”
- Does it matter to you?
- Does it send the right message to prospective members since we do more than labor and employee relations?

Thank you!

- Reception – 17:00-18:30 - Baxter
 - Hotel Concierge available for dinner booking and reservations
- Tomorrow morning
 - Breakfast – 07:30 to 08:30 (Sanctum Foyer)
 - Meeting begins - 08:30