

# What is the Mindful Business Charter?

The Mindful Business Charter (MBC) is a set of best practice, behavioural principles to tackle and reduce avoidable stress in the workplace. The principles govern both the way that organisations operate internally, and also the way in which organisations interact bilaterally.

The MBC is the result of a collaborative research exercise between leading law firms and banks and is designed to be both commercial and responsible. Although the origins are in the legal sector, the issues the MBC seeks to address, and the solutions proposed, are relevant across business. We know that when people are stressed they work less effectively and they risk damage to their health.

The MBC is designed to promote more effective, less stressful and healthier work environments, allowing people to perform at their best and deliver optimum client service. At its heart it provides a framework for discussion and action.

The commitments fall under 4 key headings and are positioned at both an organisational and individual level:

**Openness  
and respect**



**Smart meetings  
and emailing**



**Respecting  
rest periods**



**Mindful  
delegation**



It is impossible completely to eliminate pressure from the workplace, but the purpose of the MBC is to encourage more mindful, respectful working practices and to create a platform for people to speak out at times when they are under stress. The MBC should sit alongside and complement an organisation's broader mental health strategy.

The intention of the **Mindful Business Charter** is to remove unnecessary sources of stress and promote better mental health and wellbeing in the workplace. We recognise that there will be times and transactions when long-hours and stress cannot be avoided, but this isn't always the case, and we want it to become the exception rather than the rule. In this way, the Charter is brave and commercial. It recognises that we cannot remove all sources of stress, nor will change happen overnight – but as a business community we have a responsibility to try do things differently.

### MY ORGANISATION'S COMMITMENT

- Drive forward the actions and change necessary to support the Mindful Business Charter.
- Promote a culture where people can speak up early about any concerns that they might have with their wellbeing (or the wellbeing of colleagues).
- Make performance against the Mindful Business Charter / responsible business a priority standing agenda item for all client and supplier relationship review meetings.
- Ensure responsible business is included as an area of assessment during significant procurement processes.
- Once established, introduce the Mindful Business Charter to one new member every 12 months.

### MY COMMITMENT



#### Openness and respect

##### BUILDING TRUST AND EFFECTIVE COMMUNICATION:

- Discussing upfront with my colleagues, clients and contacts their preferred method of communication and clarifying any relevant implications of an individual's working patterns.
- Treating internal colleagues and external contacts with the appropriate level of respect and courtesy.
- Asking for and providing feedback to others on a regular basis.



#### Smart meetings and emails

##### ADHERING TO SMART MEETING AND EMAIL GUIDANCE:

- Allowing people to join meetings by the method they deem suitable, providing dial in details as default on meeting invites unless it is imperative that everyone attends in person.
- Being respectful of others' time by planning meetings properly (considering who needs to attend / giving appropriate notice / setting clear agendas and objectives) and avoiding last minute cancellations.
- Avoiding over-use of email and not copying people into emails that they don't need to receive.
- Making use of subject lines in emails and ensuring these are reflective of the email's content.



#### Respecting rest periods

##### CONSIDERATION GIVEN TO THE NEED TO 'SWITCH OFF':

- Where support is required outside of someone's core working hours, giving them options for when that could be (early morning or evening / weekend).
- When sending emails outside of business hours, being clear in the title whether it needs to be read / actioned promptly or considering sending pre-timed emails (so emails are not received late at night and at weekends).
- Including working hours / availability as part of my email signature, so people are aware of each others' working patterns.
- Respecting people's right to take annual leave without the expectation of them checking emails / being on call, and role modelling the same behaviour myself where possible.



#### Mindful delegation

##### IMPLEMENTING A BEST PRACTICE APPROACH TO COLLABORATION, INSTRUCTION AND DELEGATION:

- Respecting the need to provide sufficient context and information for a piece of work, ideally including the purpose and ultimate recipient.
- When instructing on a task, negotiating rather than imposing a deadline, being transparent where possible on the wider timetable, and promptly communicating timing changes which impact others.
- When being instructed on a task, being confident to flag when a deadline is unrealistic and / or unachievable.

**be brave.**

# Key Messages

- The intention of the Mindful Business Charter is to remove unnecessary sources of workplace stress and promote better mental health and wellbeing in the workplace.
- Initially a collaboration between leading banks and law firms, the MBC aims to drive behavioural change across all sectors.
- Principles are based on communication, respect and consideration

## Q&A

### Who developed it?

*The MBC was developed in 2018 by Barclays, Pinsent Masons and Addleshaw Goddard. This project was a product of genuine collaboration, and led at GC and senior partner level across the three organisations responsible. Barclays identified the issue and engaged in the challenge, Pinsent Masons devised the framework within which to respond and Addleshaw Goddard played a critical role in bringing the strategy to life.*

*This was the first time banks and their legal service providers had come together to reach a shared agenda for mental health and wellbeing. There are many programmes that raise awareness or provide support but this has a specific focus on the avoidable working methods and interactions that can cause unnecessary stress. It is recognised that this agenda is equally applicable to, and necessary, in other industries.*

### Which organisations are involved?

*There is an ever growing number of organisations from a wide range of business sectors that have made a public commitment to adopt the MBC's principles. The current list is [here](#)*

### How meaningful is this? Often there is a mismatch between what people say and what people do.

*We are not under any illusions that this will be easy – the MBC is about behavioural change and that takes time. The MBC seeks to promote a direction of travel, a movement to challenge the status quo and to move towards more thoughtful and considered ways of working.*

*Responding to client and business needs is important and we recognise that there will be times when life gets interrupted by an urgent matter or request. Much of the work we do is important. The reality, however, is that not everything that is important is urgent. Further, individuals work best when they are afforded some degree of control, predictability and autonomy over how they work and how they deal with their workload.*

*Taking action against avoidable workplace stress will result in people feeling happier, valued and positive about their work. Ultimately, we get the best out of our people when they're at their best.*

### What behaviours would you expect to see change on a day-to-day basis?

*Research into the common behaviours that create problems helped us to identify the key drivers of stress across the business sector and outline solutions to each of them. The emphasis is on respect and open communication and in most cases we are talking about small modifications in behaviour. For example:*

- *employees will always be encouraged to take holidays without an expectation of being available and emails being checked;*
- *where support is required outside of core working hours, where possible give options for when this could happen;*
- *thought should always be given to timings of meetings, to accommodate agile workers. Meetings that can be done on the phone or by video conference should be offered as an option when practical.*

## **What do you say to organisations who feel that realistically this won't be possible for them?**

*Of course there will be some who are unconvinced about adopting these new behaviours, but it is important to remember that this initiative was devised by both leading banks and leading law firms and is supported within and beyond those industries. There's a collective recognition that by taking some simple steps we can make significant strides in driving positive change. By signing up to the MBC you are showing your commitment to change, not necessarily signalling that you are already meeting the standard or are committing to adhering to it in all situations.*

*Even where an organisation is sceptical about whether its clients will be receptive to the MBC, that does not stop it taking internal action, and simply raising the question in the first place with a client can be a significant force for change down the line.*

## **How do you ensure the MBC is adhered to?**

*All of the signatories are focused on promoting a culture of openness and mental wellbeing. A crucial part of the MBC will be ensuring responsible business is assessed during significant procurement processes.*

*Furthermore, performance against these principles will be monitored at client and supplier relationship review meetings where all parties will be encouraged to be open and honest about day-to-day communication, what is working well and areas that could be improved. The review meetings will be crucial to driving genuine change and promoting a culture of ongoing meaningful feedback. In this sense it is self-policing and we are happy to rely on the professional integrity and commitment of the organisations involved to drive change in line with the MBC principles. We recognise that some organisations will find that easier than others. This provides an opportunity to support and help those that face greater challenge and/or resistance.*

*In the first instance we are looking to build momentum by getting organisations on board and helping them to collaborate with, learn from and encourage each other. In due course it is anticipated that we will use survey and other data to assess the impact of the MBC across signatory organisations.*

## **Is this being adopted by the whole organisation?**

*This is something to be determined by each signatory organisation individually. In some there has been a gradual approach, for example the legal team in a bank working with their panel law firms. They have then learned from that experience to introduce the MBC to their internal clients who have then gone on to introduce it to their external clients. Some law firm signatories have sought to introduce the MBC across all of their activity from the outset while others have limited it, initially, to their relationship with one particular signatory client. Whichever the approach, the commitment is to build momentum, effect change, learn from that experience and create further change.*

## **The initiative launched in October 2018. How has it developed since the launch, and how do you envisage it developing further in the coming years?**

*We deliberately developed the MBC so that it is flexible enough to be deployed across a wide range of professional and financial services, not just commercial banks and legal advisers.*

*Other businesses have now adopted the approach, leading to an altogether healthier approach to working, and the aim is to continue this growth. The more organisations that commit, the greater likelihood of change across all business sectors.*

# How do we implement and embed the MBC?

Interested organisations should first get in touch with byrne-dean and will be asked to participate in a group briefing call in order to better understand the MBC and how to get on board : [MBC@byrnedean.com](mailto:MBC@byrnedean.com) / 0203 695 0474.

The MBC establishes an organisational standard that must be agreed to by a senior representative of the organisation; the Senior Partner/ Managing Partner of law and other professional service firm signatories, and the General Counsel of corporate institutions (endorsed by the board). However, the success of implementation relies on all MBC signatories actively to implement change within their own organisations at a team and individual level.

We know that measuring and monitoring success will be a challenge, but envisage that this will start a collaborative conversation, where firms work together to support progress. There will be no 'one-size fits all', 'quick fix' solution – but a persistent commitment to ongoing change.

Each organisation will be different, but the interactive evolution graphic below identifies some points of reference and suggestions as to steps an organisation might think of taking as it adopts and seeks to embed the MBC. The model tracks progress through stages of interest, adoption, internal/external informing, action, embedding and deepening/refining. There is a cycle in the last four stages where an organisation might go back to the start of informing and revisit where to go next – a sense of continual evolution. The “trough of inactivity” recognises that organisations may feel they have got stuck having signed up before they see real impact/progress. We want to (a) highlight what can be being done there and (b) reassure/emphasise that there is a critical period here where discussion is happening, and planning is taking place – this is not wasted time but valuable and crucial investment of thought and energy.

The following suggested steps are revealed on the graphic by hovering over the relevant stage of evolution:

**Interest** – explore website, speak to existing signatories, attend briefing calls with byrne-dean, discuss internally, speak to clients

**Adoption** – confirm commitment of the organisation to the Charter, make a clear statement of commitment from the top of your organisation, attend signatory calls, speak to other signatories, attend formal signing event, tell clients,

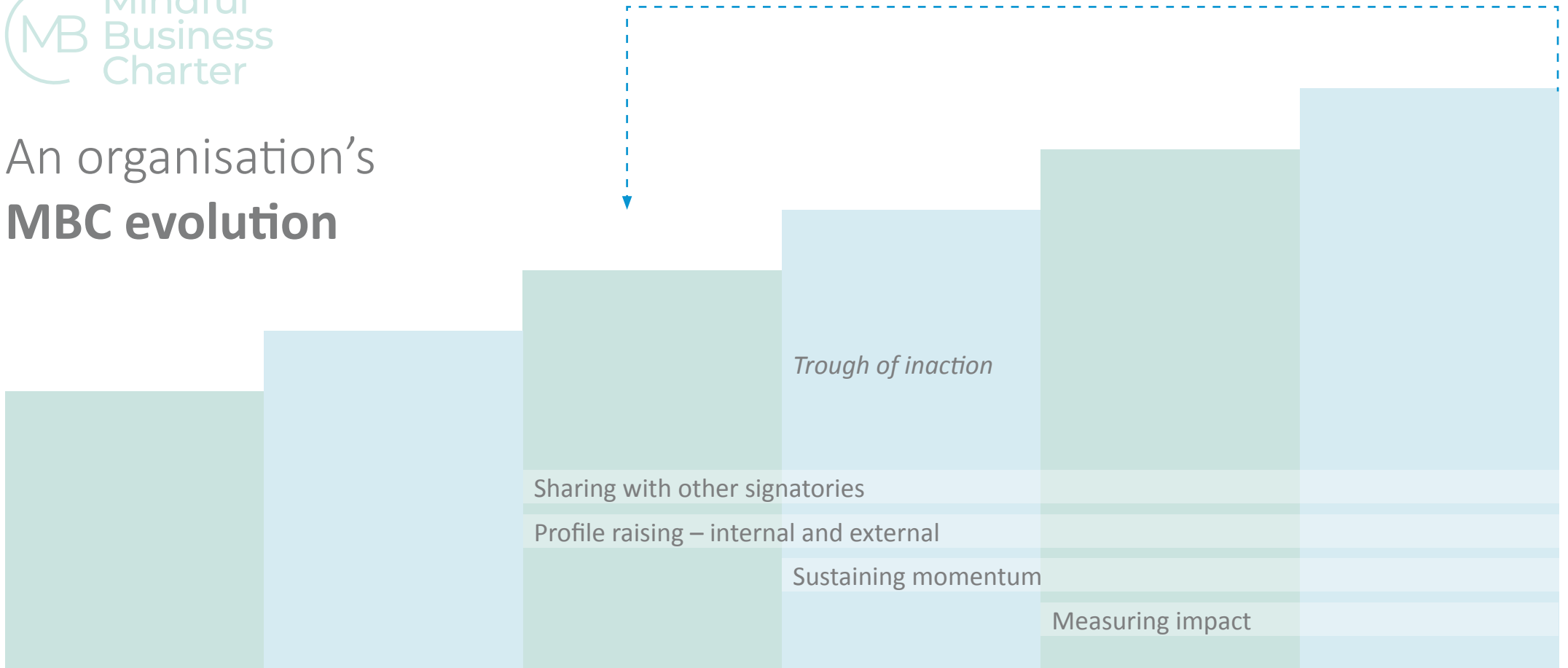
**Internal/External informing** – discuss the Charter in team meetings – ask for feedback on particular areas needing focus, consider appointing MBC champions in teams, brief core relationship teams, identify clients or suppliers that are already signatories and discuss how to implement the Charter in those relationships, identify other key client/supplier relationships which would be good opportunities to explore the Charter, consider internal training, consider staff survey to identify areas on which to focus, consider producing MBC branded stationery and other collateral, appoint a Charter team to be led by your key sponsor to be responsible for driving change, make noise

**Action plan** – develop plan of action, target specific goals with SMART (Specific Measureable Achievable Realistic and Timebound) objectives, challenge the plans, get senior level buy in, communicate plan to all stakeholders and assign responsibility for delivery and measuring progress, ensure there is a time plan

**Embed** – use Charter team to drive and monitor progress, keep informing, and reporting back, assess progress, re-assess objectives as necessary, communicate widely, encourage feedback, actively seek ideas and input, use staff surveys to monitor impact, share successes and challenges, tell stories, consider training needs, particularly around giving feedback, difficult conversations and legal project management skills, use the implementation checklist to monitor progress, share stories externally with other signatories, ensure Charter is on the agenda for relationship review meetings, put it on the agenda for procurement discussions, (as an in house team) require panel firms to become signatories, (as private practice firms) reference the Charter in pitches, encouraging potential clients to get on board

**Deepen/refine** – go back round the cycle from informing, review what has gone well and what have been the challenges, engage internally and with key clients/suppliers, use appropriate means to measure impact, survey staff, identify further areas/relationships for work, if you have begun with a particular team/area as a pilot, roll out to rest of business, share stories.

# An organisation's **MBC evolution**



**bd** *our role in the  
different stages*

CONSULTANCY TO MBC

ONE 2 ONE CONSULTANCY TO SIGNATORIES

# Implementation Checklist

Whilst signing the MBC is the first step in taking action to tackle and reduce avoidable stress in ways of working, ensuring steps are taken internally in each organisation is key to the MBC's success. Set out below are recommendations that each organisation can adopt and adapt to improve the wellbeing of their employees:

| Suggested ways to support implementation  | <input checked="" type="checkbox"/> |
|---|-------------------------------------|
| <b>The organisation</b>   |                                     |
| Organisations should support employees to develop <a href="#">‘Mental Health at Work’</a> plans with their line managers  |                                     |
| Consider how to improve the physical workplace environment to support employee mental health  |                                     |
| Provide guidance on how the Mindful Business Charter links to other organisational plans and policies   |                                     |
| Organisations should participate in Mind’s Workplace Wellbeing Index which helps organisations to monitor staff wellbeing   |                                     |
| Law firm signatories may wish to introduce the Law Society’s Supporting Wellbeing in the Workplace – Guidance for best practice   |                                     |
| Produce an annual report on employee mental health and publish this externally  |                                     |
| Appoint a health and wellbeing lead at Board and Senior Leadership level, with clear reporting duties and responsibilities  |                                     |
| Provide in-house support to employees and signpost to clinical help, including digital support, employer-purchased Occupational Health or Employee Assistance Programmes, or NHS services, amongst other sources of support   |                                     |
| As part of your organisation’s commitment in promoting openness around mental health, explain why employees are asked to share information about mental health problems and explain what will happen if they disclose   |                                     |
| <p>Organisations should engage with the <a href="#">Thriving at Work</a> Standards</p> <ol style="list-style-type: none"> <li>1. Produce, implement and communicate a mental health at work plan.</li> <li>2. Develop mental health awareness among employees.</li> <li>3. Encourage open conversations about mental health and the support available when employees are struggling.</li> <li>4. Provide employees with good working conditions and ensure they have a healthy work life balance and opportunities for development.</li> <li>5. Promote effective people management through line managers and supervisors.</li> <li>6. Routinely monitor employee mental health and wellbeing.</li> </ol> <p>There are also enhanced standards for employers who can and should do more to lead the way. These include increasing transparency through better reporting, improving disclosure processes and providing in-house mental health support and signposting.</p> |                                     |
| <b>Career, personal development and external engagement</b>   |                                     |
| <p>Signpost where information is available to encourage line managers and individuals to look after themselves and support their members of staff, including information from</p> <ul style="list-style-type: none"> <li>• <a href="#">SRA</a>,</li> <li>• <a href="#">LawCare</a></li> <li>• <a href="#">Mind</a></li> <li>• <a href="#">Mental Health at Work</a></li> <li>• Government – e.g. <a href="#">Lord Mayor’s This is Me campaign</a></li> <li>• Professional Bodies – e.g. The Law Society</li> </ul>  |                                     |

| <b>Personal issues affecting staff</b>   |  |
|--|--|
| Use data such as sickness absence to spot problems and focus support   |  |
| Provide training for managers in 'managing mental health' e.g. <a href="#">Byrne Dean</a> , <a href="#">Mind</a>                               |  |
| Encourage employers to appoint employee champions who can share their experience of mental health or other forms of peer support and mentoring |  |
| Encourage employers to provide training for employees to help further their knowledge  |  |
| Engage with external campaigns e.g. <a href="#">Housing and Mental Health</a> , <a href="#">Crisis Care</a>                                    |  |
| <b>Relationships in the workplace</b>  |  |
| Encourage staff networks – e.g. <a href="#">LGBT mental health</a>   |  |
| Encourage line managers to have regular 1-2-1's with direct reports  |  |
| <b>The Job</b>   |  |
| Implement <a href="#">Wellness Action Plans</a>  |  |
| Run staff surveys and mood trackers to improve communication and understand risks to employee mental health                                    |  |



# MBC Check-In Tool

In preparation for quarterly review meetings, organisations should look to do an internal **MBC check-in** across a number of key transaction teams, interviewing both junior and senior stakeholders. This data should then be consolidated into the MBC Scorecard each quarter.

| Interview re XX transaction with XX   | Always                       | Often | Sometimes | Rarely | Never |
|---|------------------------------|-------|-----------|--------|-------|
|   | 5                            | 4     | 3         | 2      | 1     |
| <b>Openness and respect – building trust and effective communication</b>  |                              |       |           |        |       |
| How often do you <b>discuss upfront</b> with colleagues/ clients their preferred method of communication and relevant individuals working patterns?                               |                              |       |           |        |       |
| Do you consistently treat internal colleagues and external contacts with the appropriate level of <b>respect and courtesy</b> ?   |                              |       |           |        |       |
| How often do you ask for / provide <b>feedback</b> ?  |                              |       |           |        |       |
| <b>Smart meetings and emails</b>  |                              |       |           |        |       |
| How often do you ensure that people can join meetings by the method they deem suitable (providing <b>dial in details</b> as default on meeting invites)?                          |                              |       |           |        |       |
| Do you always <b>plan meetings properly</b> ? (considering who needs to attend / giving appropriate notice / setting clear agendas and objectives)                                |                              |       |           |        |       |
| Do you try to <b>limit email use</b> where possible?  |                              |       |           |        |       |
| How often do you make use of the <b>email subject line</b> to ensure it is reflective of the email content?   |                              |       |           |        |       |
| <b>Respecting rest periods – consideration given to the need to ‘switch off’</b>  |                              |       |           |        |       |
| Where support is required outside of someone’s core working hours, how often do you <b>provide options</b> for when that could be (early morning or evening / weekend)?           |                              |       |           |        |       |
| When <b>sending emails outside of usual business hours</b> , how often do you ensure the title is clear as to whether it is time sensitive, or do you send pre-timed emails?      |                              |       |           |        |       |
| Do you include <b>working hours/ availability</b> as part of your email signature?  |                              |       |           |        |       |
| How often do you ensure that you respect people’s right to take <b>annual leave</b> without the expectation of checking emails/ being on call, and role model the same behaviour? |                              |       |           |        |       |
| <b>Mindful delegation – Implementing a best practice approach to collaboration, instruction and delegation</b>  |                              |       |           |        |       |
| How often do you provide <b>sufficient context</b> and information for a piece of work, including where possible the purpose and ultimate recipient?                              |                              |       |           |        |       |
| How often are you transparent where possible on the wider timetable, and <b>communicating timing changes</b> which impact others?   |                              |       |           |        |       |
| How often do you flag when a <b>deadline is unrealistic</b> and/ or unachievable?   |                              |       |           |        |       |
| <b>OVERALL SCORE</b>  | XX/ 70 = XX%                 |       |           |        |       |
| <b>Success story – Examples</b>   | <b>Challenges – Examples</b> |       |           |        |       |
|   |                              |       |           |        |       |

# Review meetings

We suggest the following approach, but different organisations may wish to adapt accordingly.

1. Both organisations will need to have prior **conversations** with key team members to audit performance against the MBC principles. (**MBC Check-In tool** should be used)
2. Both organisations should track progress against the **MBC Scorecard** and share their scorecard at the review meeting. This should then provoke a conversation around gaps in perception or under-performing areas. Each organisation should rank how they believe their own team performed has performed as a whole.
3. Both organisations should share anecdotal **feedback** on successes and challenges – again, this should then provoke a discussion about how we replicate success stories or improve the areas where we are not performing as well. These should be collaborative conversations – aimed at improving the way we work together to achieve the best outcomes.

★ Client

◆ Supplier

| MBC Scorecard   | Strongly Agree | Agree | Mixed responses | Disagree | Strongly Disagree |
|---|----------------|-------|-----------------|----------|-------------------|
|   | 5              | 4     | 3               | 2        | 1                 |
| We have made progress in driving forward the necessary change to support the MBC                          |                |       |                 |          |                   |
| The principles of openness and respect are being adhered to (pre-planning meetings/ respect and feedback) |                |       |                 |          |                   |
| Teams are adhering to smart meeting and email guidance  |                |       |                 |          |                   |
| Teams are giving consideration to the need to 'switch off'  |                |       |                 |          |                   |
| We have consistently implemented a best practice approach to collaboration, instruction and delegation    |                |       |                 |          |                   |
| Client score ★  | 17/25 = 68%    |       |                 |          |                   |
| Supplier score ◆  | 14/25 = 56%    |       |                 |          |                   |

|   | Success Story<br>How do we replicate?   | Challenge<br>How do we mitigate/ improve?   |
|---|---|---|
| ★ | <i>On a particular transaction all meetings started and ended on time, with no last minute cancellations. This was achieved through careful pre-planning.</i> | During a significant matter, our business teams were not in a position to adhere to the MBC and one of our partners was unable to take leave.                                 |
| ◆ | <i>On a particular transaction the MBC was used at the kick-off meeting to set expectations. This proved very valuable to those working flexibly.</i>         | There were some challenges around last minute meeting cancellations, which resulted in wasted travel time and the right people being unavailable for the rescheduled meeting. |