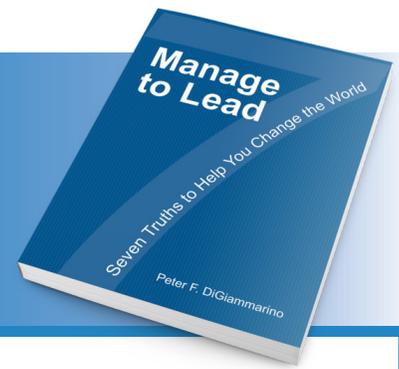


INTELLIVEN-U

STRATEGIC LEADERSHIP OVERVIEW: MANAGE TO LEAD USING THE SEVEN TRUTHS



OVERALL PROGRAM OUTCOMES

Those successfully completing this program will be able to:

- Describe and analyze an organization to determine what is most important to change next by improving its system for doing what it does, creating demand for what it does, and for growing.
- Build a coalition of support, aligned with a leader's intent, and form, launch, drive, communicate, track, and govern initiatives to accomplish targeted results.
- Apply conceptual frameworks and use tools to facilitate strategic planning and to guide organizations to achieve a desired result through a chosen course of action.
- Identify, support, and develop leaders who want to accomplish something specific and to help their organizations think, plan, and act strategically.

SESSION 1: Get Loose

Achieving **maximum productivity and performance improvement takes more than what comes just from initiatives to upgrade systems or processes**. Full value only comes with **the simultaneous evolution in the way people think and behave as individuals and together in teams and as an organization**. To effect an intentional change in organization behavior, leaders themselves must **first get off auto-pilot and adopt new ways of thinking and operating**. Our first session lays out three frameworks that serve as a foundation upon which to introduce new tools, principles, and methods for the next generation of leaders throughout the remainder of the program.

KEY POINTS:

- There are always **three perspectives from which to apply new skills**:
 - A **line-executive**
 - An **outside consultant** to a line executive
 - An **inside consultant** (e.g., support role such as HR, planning, OD)

Note: inside and outside consultants **give advice better to line-executives** (including CEOs) once they have experienced what it's like taking advice as a line-executive.
- Ideas get conceived, designed, implemented, and into operation as they go from Idea-to-Benefit.
- Leaders get help four ways: strategy, implementation, operation, and development.

OBJECTIVES:

- Meet other participants and begin to work together.
- Get off autopilot, be purposeful and open to input.
- Become familiar with models of: Idea-to-Benefit, Ways to Get Help, and Core Skill Adoption.
- Reveal which of three roles you tend to take and commit to try out the CEO role.

SESSION 2: Get Clear

A business exists to solve a problem for a customer...which begs the question: “What problem does your business solve for whom?” In this session we learn how to rigorously answer the question in three parts: **WHAT** does your business provide? For **WHOM** does it provide it? and **WHY** do customers buy it?

KEY POINTS:

- A business exists to solve a problem for a customer.
- It takes time and effort to work out a good, better, or best **WWW**; and it is doable and worth doing.

OBJECTIVES:

- Learn to rigorously describe any organization in terms of whose problem it solves, for whom, using the WWW Template.
- Experience giving and getting feedback.
- Understand that alignment across stakeholders is more important than correctness.

SESSION 3: Get Clear - How

To survive and thrive, every organization: **does what it does (DO)**, **creates demand for what it does (SELL)**, and **grows (GROW)**. The extent to which DO, SELL, and GROW are mature systems largely determines overall organization maturity. An organization does best when the vast majority of management time and attention is spent on its DO, SELL, and GROW systems. Anything else leaders spend time on must be done only to the extent required to support its DO, SELL, and GROW systems execution and development or it may be nothing more than a drag on performance and growth. DO, SELL, and GROW systems mature alternately depending upon which, at any point in time, constrains performance and growth.

KEY POINTS:

- Every business **Does, Sells, and Grows**.
- **One of the three most constrains** performance and growth.
- There are five basic operating models: **Product, Service, Channel, Operation, and Exchange**.

OBJECTIVES:

- Determine which of five basic operating models most closely matches that of your organization.
- Identify and rough out a map of your organization's DO, SELL, and GROW processes.
- Identify which of the three currently constrains your organization most.

SESSION 4: Get Clear - How Well

Before deciding how an organization needs to change, it is essential to **know how well the organization is performing**. A good approach is to select performance measures and **compare actual performance to performance plans**. Set performance goals based on **industry benchmarks for similar organizations at a similar stage of evolution, and that do similar things**. Once goals are set, allow the organization to perform and then **measure results and compare with plans, past performance, and peers**.

KEY POINTS:

- Financials (**Income Statement, Balance Sheet, and Cash Flow**) tell a story.
- The **five basic operating models** have distinct financials, competencies, and metrics.
- Organization performance is assessed relative to its **past, plan, and peers**.

OBJECTIVES:

- Be comfortable reading financial reports.
- Know what financials, competencies and metrics distinguish operating models.
- Determine your organization's financial model.
- Draft an income statement for your business and outline the story it tells.

SESSION 5: Get Aligned

Every organization has, or needs, a leader. And it is true that the power of one committed, clear person can make all the difference in the world. But **no one individual, even the greatest leader, does anything of much significance alone**. There are just too many things for one, or even two, people to be good at to do anything significant. The simple truth is that **it takes a highly co-operative, strong and diverse team** to lead an organization. The action motivated by this truth is for the leader to **decide what kind of leader to be and then to attract, collect, and align his/her top team, and collect followers**.

KEY POINTS:

- A leader sets direction, aligns resources, and motivates action.
- To assert a vision is to lead.
- Choose how to lead based on mission, resources, and preferences.

OBJECTIVES:

- Decide what kind of leader to be and collect followers.
- Form a core leadership group.
- Decide who to count on for what.
- Assert a vision.

SESSION 6: Plan Change

Over time, **organizations perform at some level**. After start-up, things fall into place leading to a **period of rapid growth**. **The rate of growth eventually slows and then plateaus** perhaps due to new technology that spawns competition or maybe due to the organization slowing down in the face of its increased scope, scale, and complexity of operations. **It falls on the leader to decide what is most important to change next** to maintain the target growth trajectory. **Change will happen** no matter what. The leader's job is to **plan the change** so that it is intentional and in the organization's best interest.

KEY POINTS:

- Leaders decide what **is most important to change** next.
- A leader always either *knows what to do* or is *deciding what to do*.
- Change initiatives without context (**current/target state, case for change, barriers**) stagnate.

OBJECTIVES:

- Prepare and deliver a sales pitch to help a CEO decide what to do next.
- Prepare a Change Framework for the change you have in mind for your organization.

SESSION 7: Do & Review

When top leaders are informed, thinking critically, and engaged enough to provide guidance and direction, things tend to go well. That is, **things get done better, sooner, and more smoothly** when leaders pay close attention. In this session, we cover an efficient way for top leaders to **get and stay up-to-speed**, see and **understand what is going on**, **ask questions and think critically**, develop a **point-of-view**, and to **provide advice, guidance, and direction** on the organization's most important functions, projects, and initiatives.

KEY POINTS:

- What gets reviewed goes well; always ask for: **Plan, Actions, Results, Lessons, What's Next**.
- To change, one needs to know **what** the leader seeks, **why**, and why s/he should **want** to **act** on it.
- Leaders **turn initiatives into action**.
- One-on-One and Initiative Reviews are key to success.

OBJECTIVES:

- Learn to: Plan, Do, Review.
- Learn why meetings fail and how to make them a key part of operations and governance.

SESSION 8: Get Help

Many, if not most or nearly all, CEOs and their leadership teams orchestrate meetings with their boards to show **how great they are and how well things are going**, and to **avoid leaving the meeting with more to do** than when it started. **A lot more value can be derived** from working with the board, and **it takes conscious effort to build, cultivate, prepare for, and work with** a high-performing board.

KEY POINTS:

- The right answer is the one everyone wants to make work.
- It's only as lonely at the top as you let it be.
- The odds of success go up when a leader:
 - Is accountable to a board.
 - Retains outside experts.
 - Works with a coach.
 - Joins a peer group.

OBJECTIVES:

- Lay out your leadership support structure.
- Know the difference between a board of advisors and a board of directors.
- Compare what we have learned to do with what others have done.
- Prepare to brief your board.

SESSION 9: Grow

One could argue, as some have, that **everything covered to this point in *Manage to Lead* prepares the organization to grow.** With a solid foundation laid, now it is indeed **time to grow.**

KEY POINTS:

- Growth is good for value, impact, and opportunity.
- Organizations go through five maturity stages: Concept, Startup, Credible, Sustainable, Mature.
- There is no ideal mix of leadership skills for *all* stages.
- An ideal skill mix, based on success norms, exists for each stage.

OBJECTIVES:

- Commit to drive orderly, good growth in your organization.
- Know that team skills can be described, measured, planned and managed.
- Draft a plan to develop skill mix through leadership hiring, culling, and development.
- Assess your organization's leadership team's skill mix and compare it with successful organizations at the same stage of maturity.

SESSION 10: Executive Session

For their final project, participants prepare and then deliver a board brief to demonstrate they understand: an organization and its current circumstances from the perspective its leader, how the organization works, why the organization must change, how the organization will be once the intended change has occurred, and what strategic initiatives must be accomplished to go from the present to the target state. In this culminating session, participants experience what it is like to **be a CEO** presenting to outside executive reviewers such as board directors, investors, and advisers.

KEY POINTS:

- **Nothing goes as planned but things go better for having planned.**
- It is important to **separate preparation from the session.**
- **Manage the meeting process;** not just the content.
- Lean-in to **participate as a full equal** when in the role of reviewer and as the leader.

OBJECTIVES:

- Experience *giving* feedback better after *getting* good feedback.
- Experience in the role of CEO in a high stakes situation:
 - The pressure of having to brief your board.
 - Fielding questions and drawing out insights.
 - Being aggressively open to input.
 - Facilitating when senior players go off script.
 - What it is like to follow through on advice.