Strategic Leadership Immersion Program:
Learn to Lead using the Seven Truths
Overview Workshop
The Association for Strategic Planning (ASP) is a non-profit professional society whose mission is to help people and organizations succeed through improved strategic Thinking, Planning and Action.

Founded in 1999, ASP is the leading global not-for-profit professional association dedicated to advancing thought and practice in strategy development and deployment for business, non-profit and government organizations. ASP provides opportunities to explore cutting-edge strategic planning principles and practices that enhance organizational success and advance members' and organizations' knowledge, capability, capacity for innovation, and professionalism.

ASP recently relaunched the Strategic Planning Society’s Strategy Magazine available on ASP’s website.

ASP NorCal Chapter
Provides forums that engage professionals in strategic thinking, planning and action by exploring cutting-edge ideas in dynamic strategic conversations.
Today’s Agenda
(times are approximate)

• 15’ Welcome
  o Why we are here.
  o How new skills roll out into organizations.

• 30’ 7-Truths
  o 15’ Get Clear and WWW exercise
  o 15’ Get Aligned, Plan Change, Do & Review,
    Get Help, Focus, and Grow

• 10’ Strategic Leadership Immersion Program

• 5’ Q&A and Closing Poll

• Optional: IntelliVen Learning Community Session
Peter DiGiammarino (aka PeterD)
Founded and Runs IntelliVen
Practical Applier of Behavioral Theory

1971-77: LEARN (It’s all about people.)
- Sloan MBA: MIS, Strategy, OD; Schein, Beckhardt, Van Maanen.

1977-96: DO (This stuff works.)
- Joined a regional start-up within a startup.
- Helped grow to 10,000 people and $1B+ over 20-years.
- Took my unit from startup to $175M, 2000 people, world-wide.

1996-2010: PROVE/HONE (It really works!)
- Top roles with public, private, VC-backed, and PE-owned ventures.
- 1B+ in realized value/impact.

2010-Present: TEACH/COACH (It works for others)
- Board member, adviser, coach, adjunct.
- Package and distribute practical ways to apply behavioral theory.
- Develop and teach post-graduate/executive curriculum for enlightened leaders.

Joyce Reynolds-Sinclair, Ph.D.
Designs and delivers on-line strategy and OD programs to help leaders perform better and grow faster. Past executive at Genentech, Lucile Packard Children’s Hospital, and Kaiser Permanente. ASP Hall of Fame.
New skills roll out in organizations first from the outside, then as staff, before becoming core and then pervasive.

Examples:
- ‘50s-'00s: Information Technology and Process Rengineering
- Present: Practical application of behavioral theory

Manage to Lead:
- Is for line-executives and their teams (i.e., 3s and 4s).
- Empowers outside and inside agents (i.e., 1s and 2s) to better help line executives.
Truth. An organization exists to solve a problem for people.

Action.

Get Clear

Know whose problem you solve, how, and how well.
The _________________ organization:

<table>
<thead>
<tr>
<th>provides...</th>
<th>WHAT</th>
</tr>
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<tbody>
<tr>
<td>for...</td>
<td>WHO</td>
</tr>
<tr>
<td>WHY</td>
<td>they pay for it.</td>
</tr>
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</table>
What ABC provides, for WHO, and WHY.

WE WILL NOW BREAK OUT INTO RANDOM GROUPS.
GROUP MEMBER WITH LONGEST LAST NAME SERVES AS REPORTER.
EACH GROUP WORKS ON ONE W BASED ON WHERE YOUR REPORTER LIVES*.
1. TAKE ONE-MINUTE TO REVIEW INDIVIDUALLY YOUR “W” AND WHAT YOU NOTICE.
2. TAKE 5-MINUTES AS A GROUP TO AGREE ON 2 OBSERVATIONS TO REPORT OUT.

### ABC provides…

**WHAT**

Residential Remodeling Services to homeowners living in San Francisco. We have revisited the industry standard way of signing up clients with a heavy focus on pre-construction services. We create a team pre-project (homeowners, designers and builders), so we can meet the clients needs while staying within budget and time constraints along with giving insight of potential problems / cost-overruns etc. that we foresee.

### for…

**WHO**

- For residential homeowners and light commercial business owners.
- Designers/architects/engineers.
- For current clients.

### WHY they pay for it.

- Our skill set and personalities suit working with end users.
- Because there is a large gap in knowledge and systems for all independent design professionals for outlining a scope of work that fits the end user and desired budget.
- To keep relationship continuity.
What AMC provides, for WHO, and WHY.

AMC provides...

WHAT

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Answers WHAT

Answers WHO

Answers WHY

Are residential and home redundant?

Are some of these not in 1 and 2?

Where: In SF? Bay Area? North Bay?
Profile:
- With certain income/wealth?
- At a certain age, stage or circumstance?

Answers WHY

What are the skill sets and personalities?

Does this apply to home owner or designer/architect or both?

Between what and what?
Case Example

**Pre:** Walked away from $9M purchase offer wanting $12M.

WWW = “WE DO STUFF FOR MONEY”

1. IT billing system for energy business
2. War-room build-outs
3. Packaged collaboration software
4. Visualizing strategy setting facilitation, top team alignment, and initiative implementation support.

**Post:** Sold 4-years later for <$30M.

Chose to focus on one WWW

<table>
<thead>
<tr>
<th>WHAT</th>
<th>Visually stimulating strategy setting facilitation, top team alignment, and initiative implementation support.</th>
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</thead>
<tbody>
<tr>
<td>FOR...</td>
<td>WHO</td>
</tr>
<tr>
<td>US Federal Government leaders</td>
<td>WHY</td>
</tr>
<tr>
<td>Make a difference, accomplish a mission, leave a legacy, get promoted.</td>
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</tbody>
</table>

**10. Strategy facilitation for government leaders**

**11. Strategy facilitation for corporate leaders**
WWW Take-Aways

• PREPARING A WWW IS MORE OF A CHALLENGE THAN IT FIRST SEEMS.

• IT’S STRAIGHTFORWARD FOR A TEAM TO UPGRADE ITS WWW...BUT IT TAKES FOCUSED EFFORT.

• IT IS WORTH THE TROUBLE FOR A TEAM TO WORK ON THEIR WWW.

• ALIGNMENT Follows CLARITY REACHED JOINTLY.
Get Aligned

Decide what kind of leader to be and collect followers.

Truth. It takes a team.

Action.

POLL: HOW MANY ARROWS DO YOU SEE HERE HEADING UP-AND-TO-THE-RIGHT?
There are many ways to lead.

**SERGEANT:** follow me

**HERDER:** get along

**ICON:** team carries leader

**HERO:** leader carries team

**TEACHER:** come along

**LEAGUE:** team of leaders
Plan Change

Decide what must change, why, and how.
What Happens After a Typical Offsite

**Imagined**

Offsite  -->  Thriving  -->  Benefits realized.

**Actual**

Offsite  -->  Flat-lined  -->  Same meeting next year!
Change Framework Example

**Current State**

**How things are now.**

1. 40% of our current sales orders are placed into the "pending" cue.
2. Support staff are not aligned. Quality Control is seen as a negative.
3. Process of managing and implementing new changes in KB is inefficient and costly.

**Target State**

**How things will be.**

1. Increase sale orders by 10-15% annually. (Decrease “pending” to 25%)
2. Analysts are aligned with support staff and working together to improve process and efficiency.
3. Analysts have proper knowledge base and support to improve sales performances.

**Case for Change**

**Good:** Create a more aligned and efficient training system that allows us to retain 10-15% more customer sales annually.

**Bad:** Continued losses in sales and new customers, increasing our competitors market share.

**What must be done to achieve the Target State**

Meet with leadership team; conduct surveys and interviews with employees and learning consultants to create new training program and process.

Have audit team review program for approval. Implement new hire training program and refresher course training for current employees. Evaluate program quarterly.

**Barriers**

1. Changing old behaviors and adopting new ones takes time to learn and adjust. (Especially top agents familiar with old system)
2. Getting all of the supporting structures/departments in the US to align and communicate in an efficient and productive manner.
Nail the context and launch initiatives at the offsite.

Use the **Change Framework** to tell the whole story for each initiative:

**Case for Change**
What really good things happen if we change?
What really bad things happen if we do not change?

**Target State**
How things will be after the change.

**What must be done to achieve the Target State?**

**Barriers**
What will be hard about implementing the actions needed to achieve the target state?

Use the **Initiative-to-Action** template to launch initiatives, seed expectations, and lay a governance foundation before the offsite ends.
Integrate Launching Implementation with Setting Strategy.

Meeting Flow

Initiatives

Activity

Collect/ Organize/ Assess

Discuss, Dialogue, Create, Debate, Decide

Pre-Offsite (Input)

Traditional Offsite (Process)

Initiative-to-Action (Process)

Initiative-1 Workstream

Initiative-2 Workstream

Initiative-3 Workstream

Initiative-n Workstream

Assign, Drive, Govern, Monitor, and Communicate (Implementation)

Exec Committee Meeting
Truth. It pays to pay attention.

Action.

Do & Review

Take action.
Review what happens.
Do & Review Cycle

Annual Cycle

Goal Achieved?

Are results as expected?

Exception Process

Are observations correct?

No

NO: Fix

Yes

Monthly Cycle

Are results as expected?

Exception Process

Are observations correct?

No

NO: Fix

Yes

Quarterly Cycle

Verify goal is still right

Revise

Set goal for measures

Project

Set what to track

Study like orgs

Define Success

Start

NOW WHAT?

To do differently going forward

SO WHAT?

Determine significance and impact

WHY?

Determine why actual differs from projection

WHAT?

Determine what occurred

What's next?

Perform

Measure

COMPARE
Truth. No leader succeeds alone.

Action.

Get Help

Build a board. Retain experts. Get a coach.
Support Structure for Success

- Accountability Board
- Subject Matter Experts
- Executive Coach
- Leadership Community
- Peer Group
- Core Leadership Group
- Workers

CHAT: IN WHAT LEARNING COMMUNITY DO YOU **REGULARLY** PARTICIPATE?
Truth. It’s OK to do what you like and are good at.

Action.

Focus

Act intentionally, persist variously.
Those who want to do what they are good at and like doing are more engaged and perform better.

ADVICE TO LEADERS:

• Give *yourself* permission to do what you are good at and like doing.

• **Study those you work with.** Learn what each likes and is good at doing.

• Help each *want* to do what s/he is good at and likes doing because it is highly valued.
Truth. Growth is good.

Action.

Grow

Grow to increase value, impact, and opportunity.
Organizations evolve through five more-or-less well-defined stages of operational maturity.

- **Concept**
  - Execution
  - Proof
  - Focus

- **Startup**
  - First clients
  - First employees
  - Revenue/Funding
  - Performance

- **Credible**
  - Plan
  - Leadership
  - Drive

- **Sustainable**
  - Going Concern
  - Sale or Finance
  - IPO

- **Mature**
  - Payoff
  - Managing Growth
  - Routine
  - New Growth
  - Complacency

**DEFINING ELEMENTS**
- Concept
- Money
- Team

**CONCERNS**
- Get Started
- Survival
- Focus
The Seven Truths:
disarmingly simple…and NOT easy!

- Get Clear
- Get Aligned
- Plan Change
- Do & Review
- Get Help
- Grow
- Focus
Ways to put the Seven Truths to work:

<table>
<thead>
<tr>
<th>FREE CONTENT</th>
<th>SELF-GUIDED</th>
<th>LIVE ON-LINE</th>
<th>IN-PERSON WORKSHOPS</th>
<th>INTELLECTUAL PROPERTY LICENSES</th>
<th>PROFESSIONAL SERVICES</th>
<th>RAISE CAPITAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Overview Workshop video recording and transcript</td>
<td>• Manage to Lead: Seven Truths to Help You Change the World textbook</td>
<td>• Strategic Leadership Immersion Program*</td>
<td>• Strategy Offsite</td>
<td>• Train trainers</td>
<td>• Financial model</td>
<td></td>
</tr>
<tr>
<td>• intelliven.com:</td>
<td></td>
<td>• Learning Community</td>
<td>• Senior Executive Team Assessment</td>
<td>• Instance for</td>
<td>• Teaser</td>
<td></td>
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<tr>
<td>o 50+ tools</td>
<td></td>
<td>• Monthly Coaching</td>
<td>• Manage to Lead Self</td>
<td>o Own-use</td>
<td>• Management presentation</td>
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<tr>
<td>o 200+ posts</td>
<td></td>
<td></td>
<td>• Manage to Lead One-on-One</td>
<td>o Re-sale</td>
<td>• Confidential Information Memorandum</td>
<td></td>
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<tr>
<td>o 30+ insights</td>
<td></td>
<td></td>
<td>• Manage to Lead Teams</td>
<td></td>
<td>• Dry-runs, meeting hosting, orchestration</td>
<td></td>
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<tr>
<td>o 25+ videos</td>
<td></td>
<td></td>
<td>• Manage to Lead Organizations</td>
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<tr>
<td>• Subscription to monthly posts.</td>
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<td>• Up-to one hour of phone support</td>
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*Contact SF Chamber of Commerce, Association for Strategic Planning, KBGlobal, Flevy, or intelliven@Intelliven.com for availability and pricing.*
Strategic Leadership Immersion Program
Where leaders learn to be self-aware and foster engaged workplaces.

SUMMARY

- Empowers leaders to:
  - Practically apply behavioral theory.
  - Grow as a team by working ON their business.
  - Align core messages.

- Targets senior and up-and-coming executives.

- Provides reflective and experiential learning: your case IS the course.

- Offers on-going coaching, accountability, and learning community.

- Is optimized for virtual delivery.

WHAT provides…

Twenty virtual, instructor-led, interactive class hours in two-hour, weekly sessions that teach a plan of action and tools to make planned change using Applied Behavioral Theory.

WHO for…

Leadership teams of up to five, who run a significant business they want to change in a specific way to perform better or grow faster.

WHY they pay for it.

- Make the change leaders want.
- Shared team experience working ON the business.
- Develop messages to share with stakeholders (employees, clients, investors, partners, recruits, etc.).

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Program Road Map

**Prep**
- **1s, 2s**

**Core Program**
- **WEEKS 1-5**
  - GET READY
- **WEEKS 6-7**
  - GO
- **WEEKS 8-9**
  - GUIDE
- **WEEK 10**
  - EXECUTIVE SESSION

**Support**
- **3s, 4s**
- **1s, 2s**

**EMAIL AND PHONE SUPPORT**
# Program Road Map

## Prep

<table>
<thead>
<tr>
<th>1-2 MONTHS PRIOR</th>
<th>2-4 WEEKS PRIOR</th>
<th>1 WEEK PRIOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Expectations &amp; Goals</td>
<td>Get Team Buy-in</td>
<td>Complete Pre-Work</td>
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</table>

## Core Program

|----------------|--------------------|-------------------|-------------------|------------------|-------------|-------------|----------------|----------------|------------------|--------------------------|

## Support

- **EVERY 4 MONTHS**
  - Learning Community
  - Share Experiences, Lessons, New Content

- **QUARTERLY**
  - 2-3 Hour Executive Sessions

- **ONGOING COACHING**
  - Email and Phone Support
<table>
<thead>
<tr>
<th>PHASE</th>
<th>TIMING</th>
<th>TOPIC</th>
<th>DESCRIPTION</th>
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<tbody>
<tr>
<td>PREP</td>
<td>~2-Months</td>
<td>Set expectations</td>
<td>Instructor meets with leader to get to know each other, the organization, the team, priorities, and planned change.</td>
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<tr>
<td></td>
<td>Ahead</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>~1-Month</td>
<td>Set expectations and get</td>
<td>Instructor meets with leader and team to review objectives, set expectations, get buy-in and commitment.</td>
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<tr>
<td></td>
<td>Ahead</td>
<td>team buy-in</td>
<td></td>
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<tr>
<td></td>
<td>Week Ahead</td>
<td>Pre-Work</td>
<td>Specify: organization, leader, team, change in mind to make</td>
</tr>
<tr>
<td>LAUNCH</td>
<td>Week 1</td>
<td>Get Loose</td>
<td>Nine-dots, Idea-to-Benefit, four kinds of help, how a new skill becomes core</td>
</tr>
<tr>
<td>GET READY</td>
<td>Week 2</td>
<td>Get Clear – WWW</td>
<td>MARKET served, PROBLEM solved, SOLUTION provided</td>
</tr>
<tr>
<td></td>
<td>Week 3</td>
<td>Get Clear – HOW</td>
<td>DO, SELL, and GROW systems; identify which constrains performance</td>
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<td>Week 4</td>
<td>Get Clear – HOW WELL</td>
<td>Compare performance to PAST, PLAN, and PEERS</td>
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<td>Week 5</td>
<td>Get Aligned</td>
<td>Decide what kind of leader to be and collect followers</td>
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<tr>
<td>GO</td>
<td>Week 6</td>
<td>Plan Change</td>
<td>Assign sponsor; launch SYSTEMS, PROCESS, and BEHAVIOR change initiatives</td>
</tr>
<tr>
<td></td>
<td>Week 7</td>
<td>Do &amp; Review</td>
<td>WHAT Happened, WHY, SO WHAT, NOW WHAT</td>
</tr>
<tr>
<td>GUIDE</td>
<td>Week 8</td>
<td>Get Help</td>
<td>Build a board, find experts, get a coach, peer group, learning community</td>
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<tr>
<td></td>
<td>Week 9</td>
<td>Grow</td>
<td>Five stages of organization maturity, characteristics, and concerns.</td>
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<td></td>
<td>Week 10</td>
<td>Executive Session</td>
<td>Present to an outside board to test clarity and get advice</td>
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<tr>
<td></td>
<td>Week After</td>
<td>Submit final project</td>
<td>Incorporate outside input to advance thinking.</td>
</tr>
<tr>
<td>LEARNING COMMUNITY</td>
<td>Every 4 Months</td>
<td>Share experiences, lessons, new content</td>
<td>E.g., Focus: Do what you like and are good at doing; help others do the same.</td>
</tr>
<tr>
<td>GOVERN</td>
<td>Quarterly</td>
<td>2-3 Hour Executive</td>
<td>Ongoing accountability and guidance.</td>
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</table>
What Participants Say

• “The Strategic Leadership Immersion Program is for leaders of a small team all the way up to being CEO of a global enterprise.” Reid, CEO of PE-owned $100M company.

• “I like the processes we are learning here. You try it, see if it works. If it does you go with it. If it doesn't, you tweak it and try again. It works wonderfully.” Bob, Owner/CEO; $1M company.

• “Amazing results! We are soaring.” Rich, CEO, $200M company.

• “I appreciate the simplicity with which concepts are presented - not dumbed-down, just simple and clear. … Prepare to work hard and come to every session…it’s WORTH it!” Gena, $4M Marketing and Communications Executive.

• “This was a good session… we were talking about issues we rarely get to discuss” Scott, Services Director, $15M company.

• “I got a lot more out of the program than I thought I would. It challenged me to step out of the day-to-day to learn new things I was able to immediately apply to my organization and to my own personal growth.” Brian, Director of $20M Division.
Winter 2019

• Wednesdays at 11:00 AM eastern US, February 6th to April 10th.

• Teams of up-to-five are enrolling now; space is limited (next program launches early July):
  • Full Program: $5000/team of up-to five; $3400 for an individual.
  • Core Program: $3000/team of up-to five; $2400 for an individual.

• Contact SF Chamber of Commerce, ASP, Flevy, or KBGlobal for member pricing.
Thank you.

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