

WELCOME

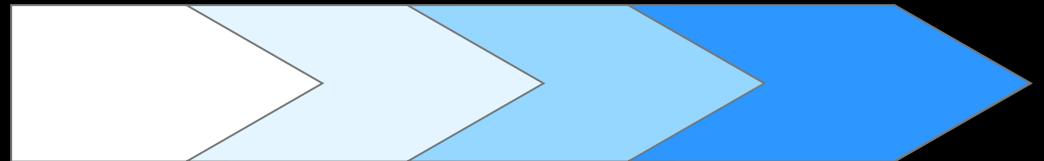
- IntelliVen Learning Community 3 Alliance by Design starts on the hour.
- [Join ILC LinkedIn Group](#)
- [Apply to participate in Cohort 4](#)
Launches October 9
- [Register for next Manage to Lead Immersion Program Online Overview Workshop:](#)
December 5 at 11:00 am eastern
- **Enter in CHAT:**
 - **Past participants:** Share a key lesson from your experience with the program.
 - **Guests:** What attracted you to join us today?

intelliVen

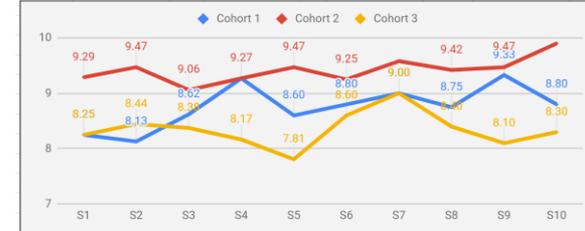
Intelligent Strategies. Successful Ventures.

IntelliVen Learning Community 3 Manage to Lead using the Seven Truths: Alliance by Design

September 25, 2019



Cohort 1 & 2 experiences led directly to Cohort 3 enhancements.

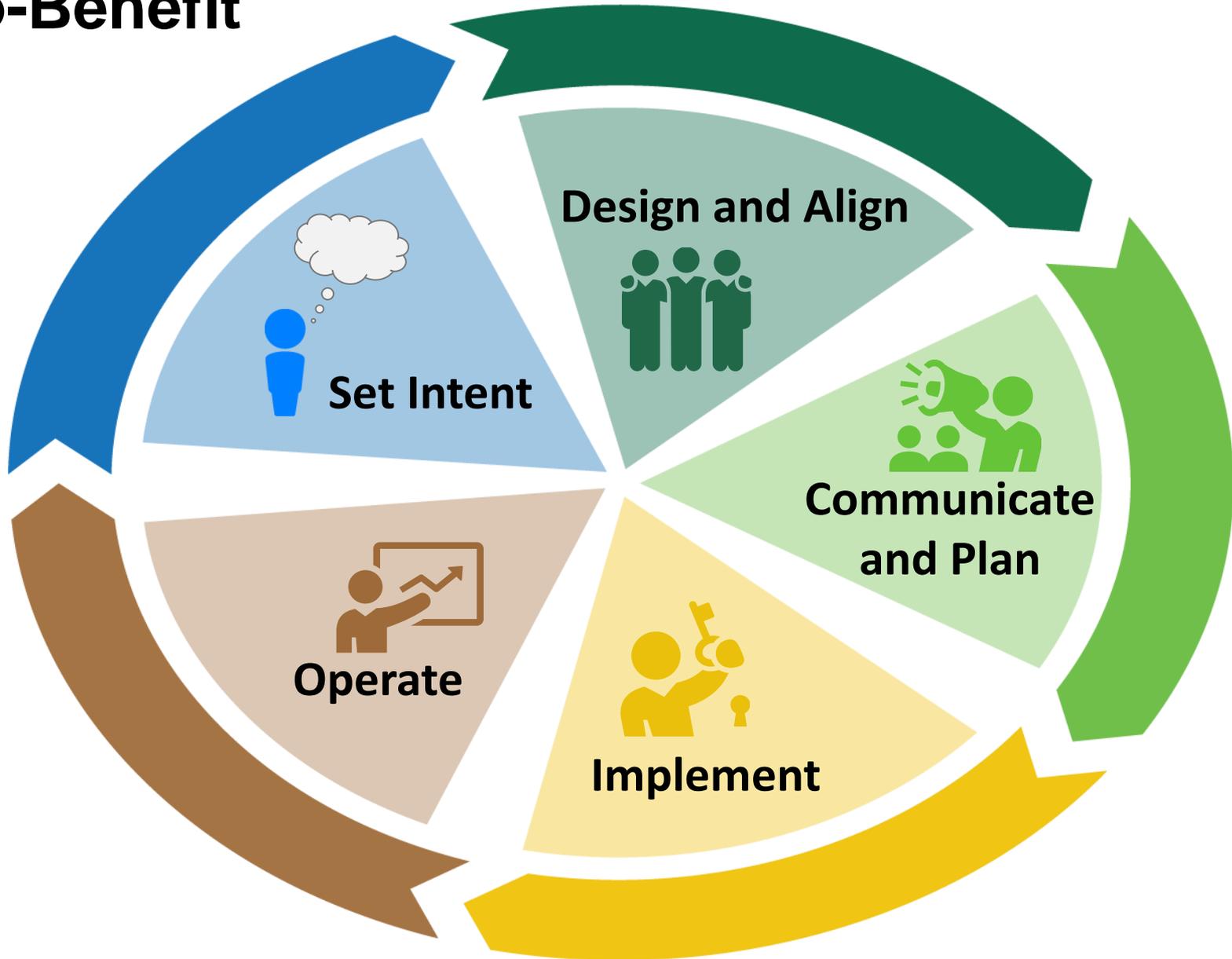


- New learning platform with three sections for each topic:
 - **PREP:** MtL and other readings, video clips, practice cases, work problems
 - **LIVE:** With access to input during prep
 - **POST:** What really happened, additional material, reflections & feedback, links to video & slides
- Participant input accessible during and post session.
- Team preparation input and reflections pushed to team leader and principal consultant weekly.
- Split Teaching and Technical Assistant responsibilities from Co-instructor.
- Moodle is being phased out:
 - Cohort 1 and 2 Moodle content is otherwise available (contact PeterD if you can't find what you seek).
 - IntelliVen now a valid *certificate badge issuer*.
 - Prior badges will be re-issued with instructions to post on your LinkedIn profile.

What's Next

- LinkedIn group for ILC members to interact between sessions.
- Increase number of times teams talk through WWW and Change Frameworks.
- Facilitate sharing content (e.g., WWW, process charts, stick figures) between team members before and after live sessions using **Group** function.
- Positive response to recorded clips with focal questions in Pre-Work. Further tweaks coming:
 - Session 1 WWW:
 - Move WWW introduction to PRE-Session 1.
 - Each team walks through their WWW before and after AMC case.
 - Session 5 GET ALIGNED:
 - Move **Decide How to Lead** back into live session.
 - Move **Disgruntled CTO What Really Happened** to Post Session.
 - Session 9 GROW:
 - Add another/longer cross-team practice session.
 - Move KTA lecture to pre-session video clips.

Idea-to-Benefit

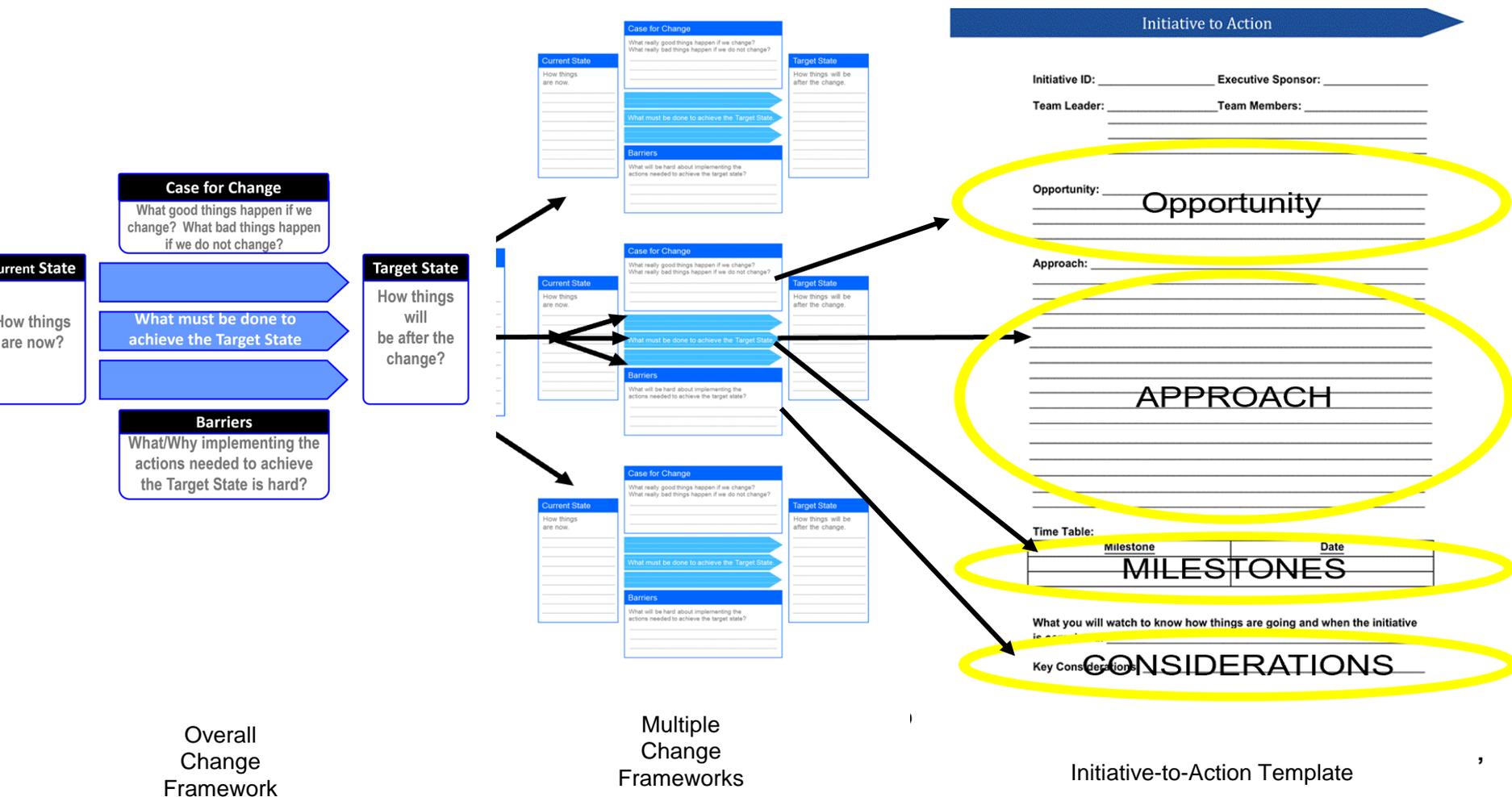


MtL turns *insights* into *action* to *get the change you want!*



Based on:
Kotter, John (1996) *Leading Change*

Turn *Initiatives* into Action



ILC Purpose:

for past, present, and prospective program participants to

- Reinforce and improve the **application of past learning**.
- Network to **learn with and through others** who share a common foundation.
- Practice **briefing/listening** and **getting/giving feedback**.
- **Learn** new content.

ILC 3: Alliance by Design

- 30': Review
 - Welcome, Program Improvements
 - ILC Context, Today's Agenda
 - Featured guest: **Jame Cofran**, President of THRUUE
 - Progress on Your Cases
- 30': Alliance by Design
- 30': Manage to Lead Workshops Summary: David Spungin
- 20': Open Forum
- 10': Reflections, comments, and suggestions for next session

Q&A with Jame Cofran

- President of THRUUE
- Has run three teams through MtL
- How are things going?

Discussion Topics Submitted in Advance

- What are the most effective ways to create stakeholder buy-in for change initiatives?
- What is the most used tool for owners wanting to grow their business?
- Is IntelliVen open to combining and positioning of assets?

Progress on Your Cases

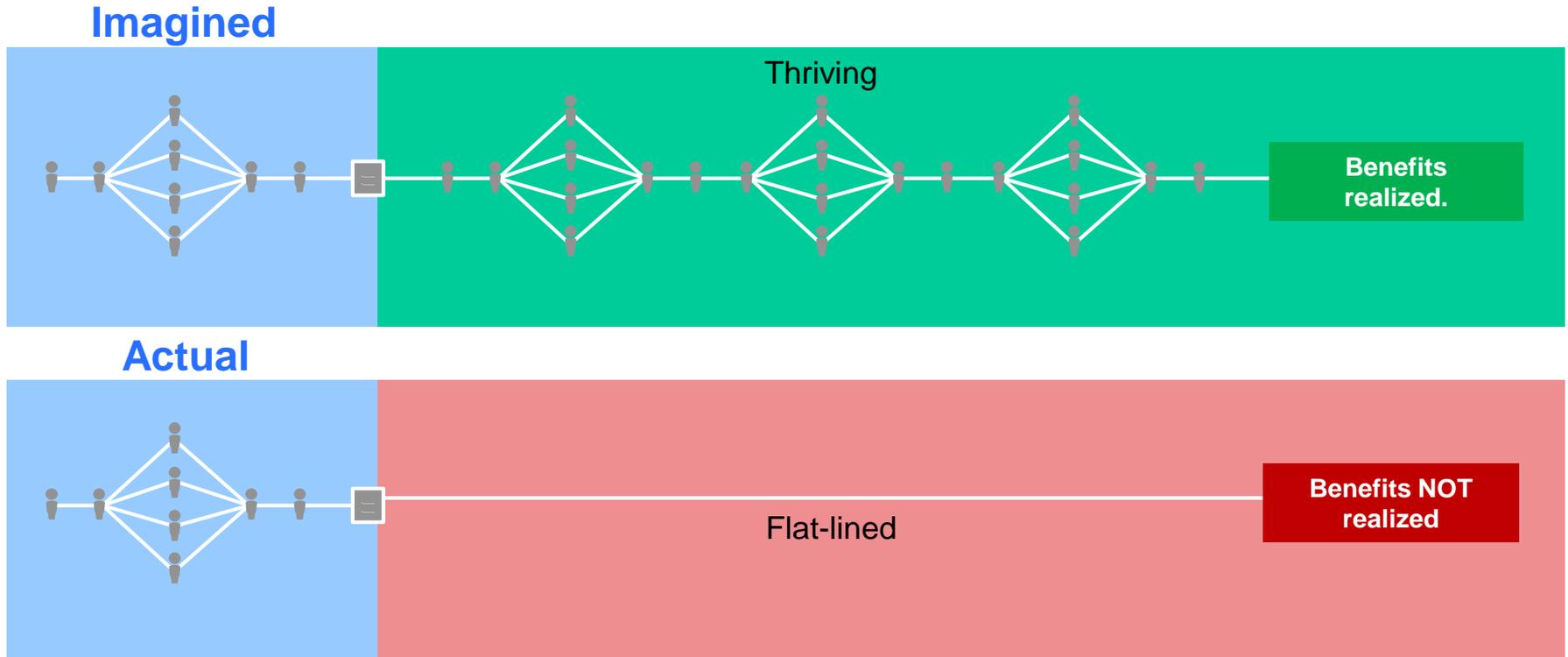
- Raise hand in Zoom tools (and keep it raised) to signal you have something to share with the group.
- When called on, share (2'):
 - Intent
 - Action
 - Result
 - Lesson
 - Plan
 - Wants

The Definition of an Alliance

Based on notes from working with Dr. Peter Keen, author of Decision Support Systems:

- Firm-to-firm agreement to operate...
- in a way that works and that keeps working as the business environment and the parties' organizations evolve...
- by meeting their mutual interests...
- until there is a mutual agreement to disconnect.

What Happens After a Typical Alliance Set-up



What goes awry:

- Alliances are handled as a “deal” with most attention going into the purpose of the partnership and the deal terms with sincere talk about collaboration and trust.
- After agreement, representatives of each party independently set out to get things done in their respective organizations.
- High cost of top people to negotiate the arrangement, and frontline energy to make it work, wasted.

Reasons to partner, ally, merge, or acquire ... or not!

Pros

- New offerings to sell existing customers.
- New customers for existing offerings.
- New resources.

Cons

- Requires a premium terms or it's a dog.
- Time consuming and difficult.
- Scarcity of required management attention.

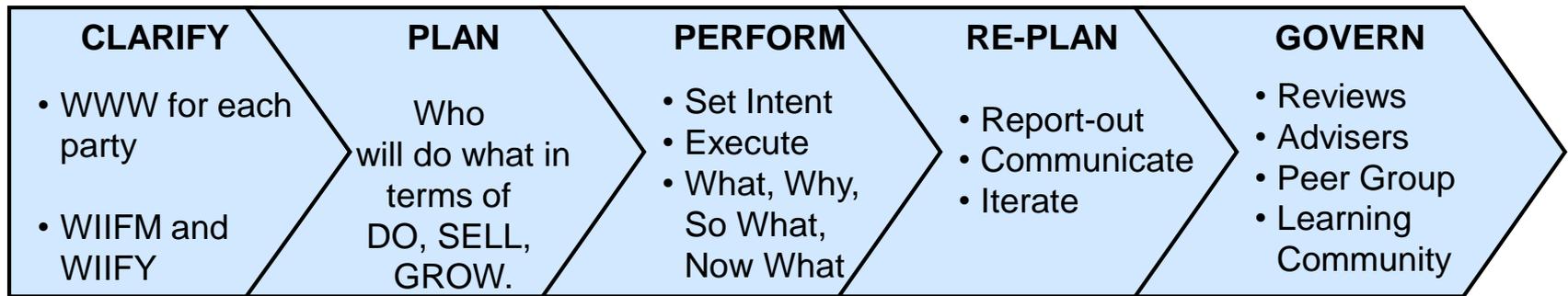
Agree on the intended position along the Alliance Continuum

Based on notes from working with Dr. Peter Keen, author of Decision Support Systems



Each has a different risk/return and trust/contracting trade-off calculus.

Architect and Progress Through Stages of Alliance Development, Operations, and Governance



Practice Case Instructions

- 2': Think of a time when you were disappointed with how a partnership, alliance, merger, or acquisition worked out compared to expectations.
- Click link in Chat to open these instructions.
- Accept break out request:
 - 3': Introduce yourself, organization, role, and share your example case with the group.
 - 5': Select a reporter and work as a group to come up with what you could have done to improve the odds of a better result.
- 10': Return to the Main Room
 - Reporters put Hand-Up to share your group's ideas when asked.

Tips

- Deal terms hold things together, but they do not make things work.
- Operations makes or breaks the alliance.
- Governance makes sure operations works as intended.
- Have a realistic set of exit conditions.
- Go for Peer-to-Peer Symmetry (i.e., *balanced*; not necessarily *equal*) in terms of:
 - Risk
 - Benefit
 - Inputs
 - Knowledge sharing
 - Ownership
 - Commitment.

Conclusions

- Decide where to position the partnership the alliance continuum.
- Clarify to each party both party's strategic intent for the alliance.
- Know and communicate how DO-SELL-GROW will work.
- Assign leaders with high stakes from both organizations to make sure things go well.
- Keep visible to most senior leaders to govern and guide via executive reviews.

Manage to Lead Immersion Program

provides...
WHAT

10 weekly, two-hour instructor-led interactive online, or in-classroom sessions that teach a **plan of action** and **tools** to make **planned change**, using **Applied Behavioral Theory**, on the **UMass Amherst UWW** learning platform.

for...
WHO

Leaders and their teams of 3 to 7, who run an organization:

- **PE/VC-backed**
- **Baby-boomer founder/owner/operator preparing for transition**
- **Start-up entrepreneur**
- **Leader of a significant internal organization unit or function**

WHY
pay for it.

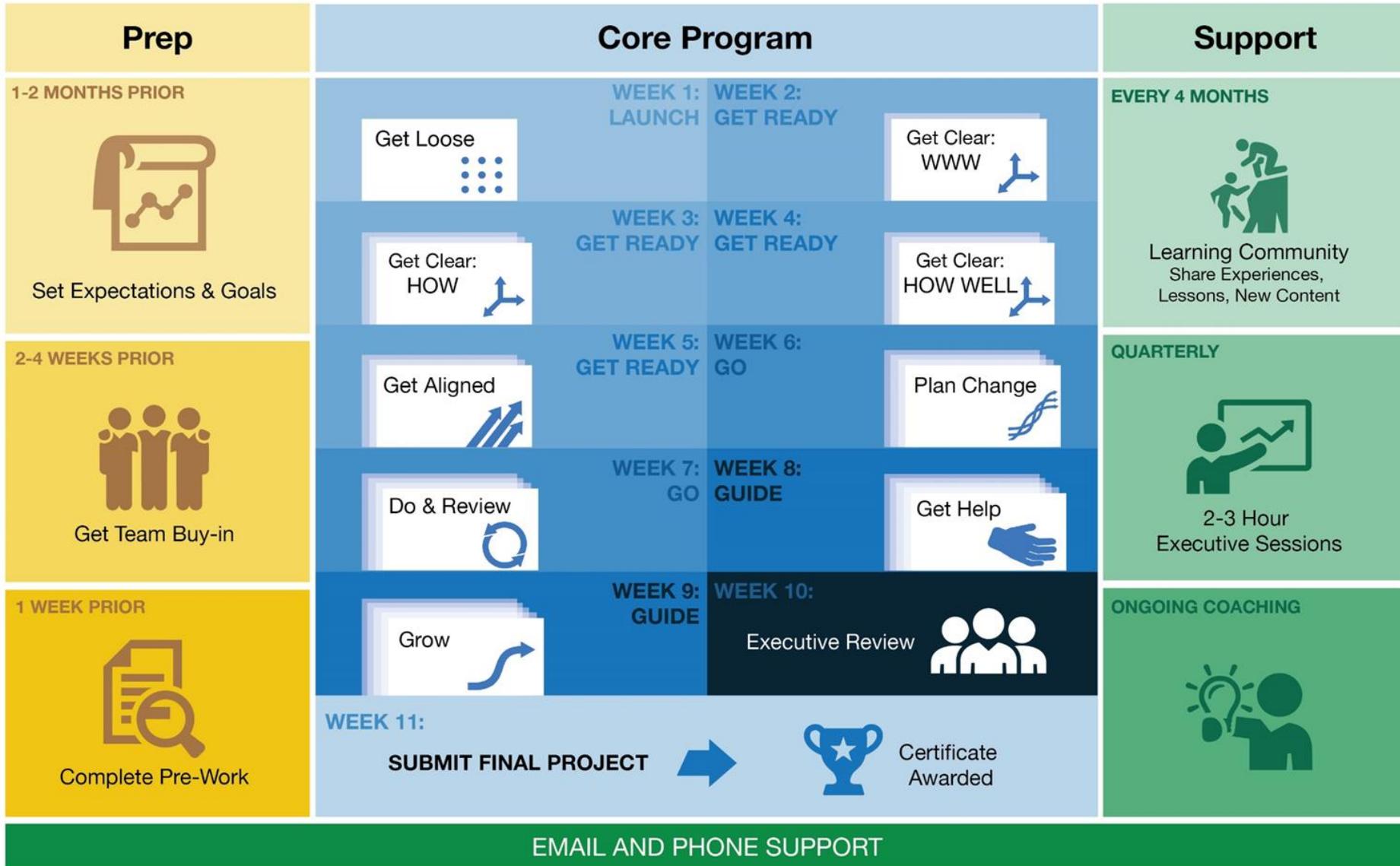
In order to:

- **Make a specific change to perform better and/or grow faster.**
- **Develop core messages** to stakeholders (employees, clients, investors, partners, recruits, etc.).
- Have a shared **team experience working ON the business:**

Your Case *IS* the Course!

Your Case *IS* the Course

in our Flipped Classroom, Experiential Learning Model



EMAIL AND PHONE SUPPORT

Past participants tell us MtL changes lives!

"[...]I must say whatever change you witnessed during the final project is a direct result from the Immersion Program. I'm really excited to share the news that we got selected to the Freddie Mac vendor academy program this week which will put us in direct proximity with the buyers for the next 5 months. I've felt really good delivering the initial sales pitch at the event today and I truly saw the value of Peter D's coaching there."

— SRINI B. FOUNDER & CEO
OF \$8M IT SERVICES FIRM

[Click](#) to see what participants say.

University Without Walls (UWW) provides state-of-the-art learning platform and tech support.

UMASS AMHERST

Peter DiGiammarino 18

My UMass Amherst Help & Resources

About

intelliVen-U

Powered by UMass Amherst University Without Walls™

About

▼ Manage to Lead Immersion Program: Using the Seven Truths

Announcements

Program Overview

About

Orientation

Program Content

Sessions

My Group

Resources

Toolbox

Live Session Recordings

IntelliVen Manage to Lead

Watch later Share

MANAGE TO LEAD

Manage to Lead Immersion Program

Seven Truths to Help You Change the World

Summer 2019 Session

Jul 10 - Sep 11

Instructor: [Peter F. DiGiammarino \(PeterD\)](#) and Co-Instructor: [Joyce Reynolds-Sinclair, Ph.D. \(Joyce\)](#)

Manage to Lead curriculum is a comprehensive suite of online and in-person experiences to develop self-aware leaders and engaged workforces through mastery of state-of-the-art individual, interpersonal, and group behaviors. Leaders and teams that participate in our program and workshops experience the following improvements in themselves and in their organizations:

- **Results:** Better performance and faster growth.

[Click](#) to sample the learning module platform.

Cohort 4: Fall 2019

Wednesdays October 9th to December 11th
11:00 AM to 1:00 PM eastern US

FOR MORE INFORMATION VISIT THE PROGRAM LANDING PAGE:

[LEARN HOW](#)

IDEAL FOR ORGANIZATION LEADERS AND THEIR TEAMS
WITH A CHANGE IN MIND TO MAKE:

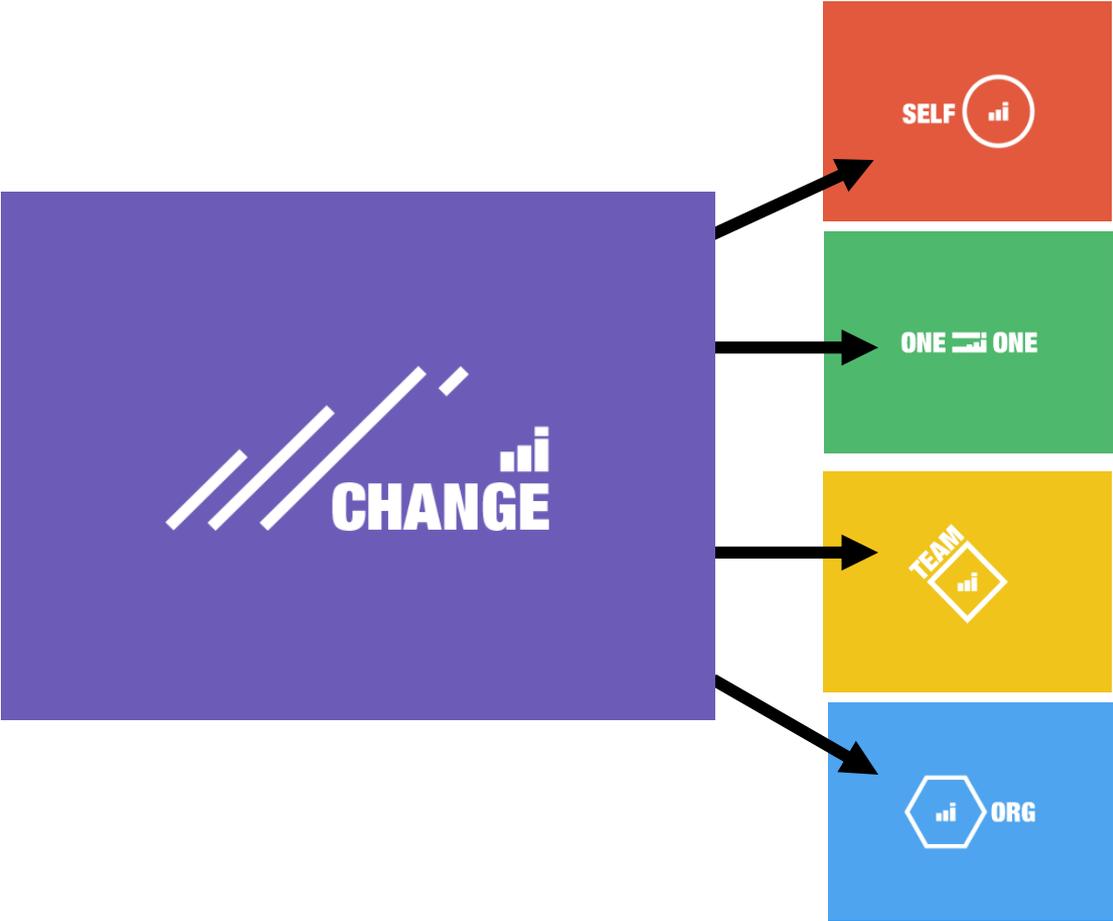
[Apply Now](#)

\$12,500/TEAM OF UP TO 5

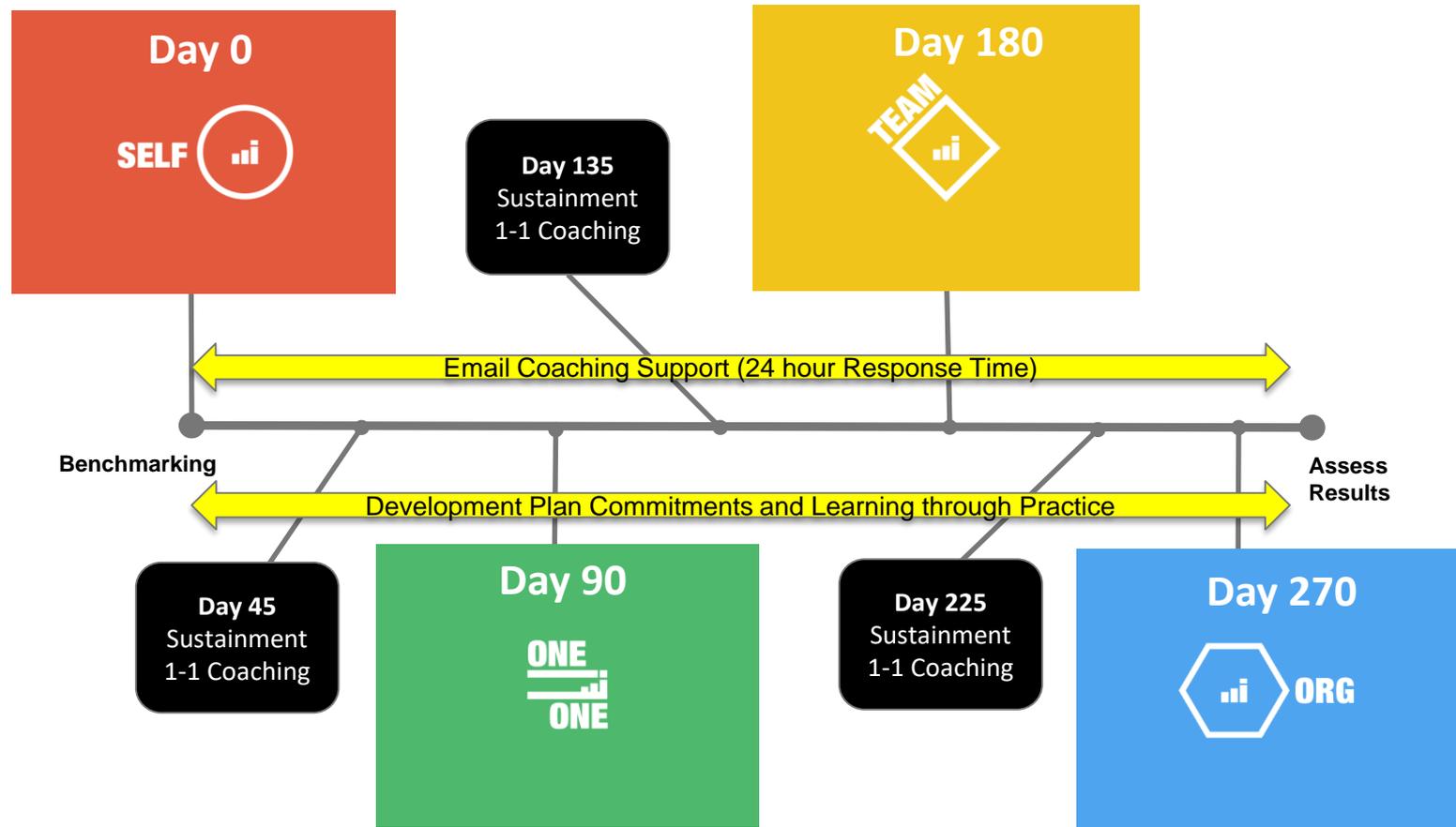
DISCOUNTS AVAILABLE FOR NON-PROFITS AND EARLY STAGE ORGANIZATIONS.

CONTACT ASP, KBGLOBAL, UMASS FOR YOUR GROUP'S SPECIAL PRICING.
COMING SOON: ISODC AND PALO ALTO CHAMBER OF COMMERCE

Manage to Lead Two-Day Workshops help leaders become self-aware and to foster engaged workplaces.



Manage to Lead Workshops are two-days, quarterly at your location or ours with personal 1-to-1 coaching.



Manage to Lead **Self**

One/two-day workshop to help you “see yourself” more fully, so you can choose more effective action.



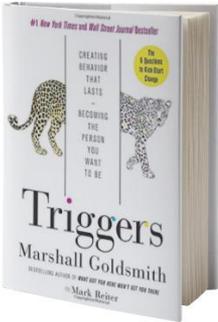
Leading Self

Focus: Self-awareness; self-management

Topics: Values, leadership lens, mindset, emotional intelligence, credibility, personal accountability, resiliency, decision-making

Assessment: EQ-i 2.0

Text: *Triggers* by Marshall Goldsmith



Manage to Lead 1-to-1

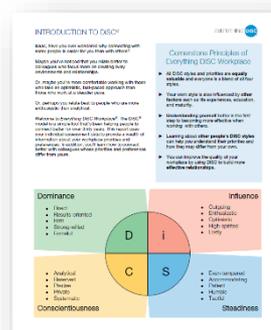
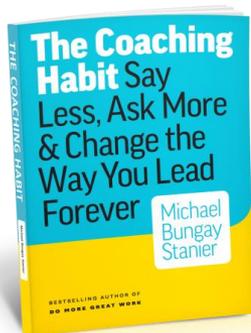
One/two-day workshop to increase your leadership effectiveness in important 1-to-1 communications.

ONE  ONE

Throughout your career, you will rarely accomplish anything significant alone; even the greatest leaders work with, and through, others. Thus, your success is largely dependent on the quality of your personal relationships, and strong relationships are built through sound communication. The best leaders can adjust their communication style to meet the needs of others. They also can navigate difficult conversations like delivering critical feedback and outright conflict. Most importantly, they practice coaching conversations that help to unleash the potential in others.

Specifically, this **Leading Individuals** workshop is designed to:

- Utilize the DiSC® assessment to create an opportunity for reflection on your behavioral, temperament, and personality preferences
- Provide you with a comprehensive overview of the way other people think, act, and interact with your specific DiSC® style.
- Increase awareness of your non-verbal communication tendencies and how you can cultivate more leadership presence
- Give you frameworks and tools to support more masterful managerial specific communications to include: making effective requests, delivering feedback, and coaching conversations
- Help you to create a self-directed action plan for continued development post workshop



Leading 1-to-1
Focus: Relationships, personal differences; developing people
Topics: Preferences, managing conflict, verbal/non-verbal communication, feedback, facilitative coaching
Assessment: DiSC® Workplace
Text: *The Coaching Habit* by Michael Bungay Stanier

Manage to Lead **Team**

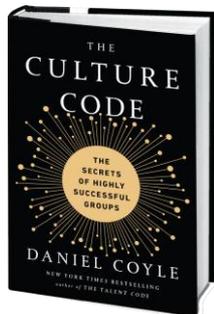


Two-day workshop to help you build a culture that enables teamwork and high-performance.

Teamwork is the single most untapped competitive advantage in most organizations! Unfortunately, many “teams” today are merely groups of interdependent people working together. They lack a mutually agreed upon common purpose and challenging goals related to that purpose. They don’t engage in healthy debate and lack peer accountability for results. Most importantly, they lack a culture that promotes vulnerability with one another and creates trust. We all want to be a part of something bigger than ourselves...So, why don’t most groups engage in these activities and create high-performing teams? First, it’s hard work and requires us to get uncomfortable. This requires leadership to help the group deal with discomfort and take tangible steps towards becoming a team. Second, most leaders are untrained on how to do that well. This workshop eliminates the guesswork and provides a proven process for building a culture that enables effective teamwork.

Specifically, this **Leading Teams** workshop is designed to:

- Build comprehension of The 5 Behaviors of a Cohesive Team® framework through taking The 5 Behaviors of a Cohesive Team® assessment and assessing your individual/team results
- Create space for greater connection and practice engaging in vulnerability-based trust
- Enhance understanding of how teams engage in conflict to gain shared commitment
- Explore how the best teams hold one another accountable to achieving results
- Help you as a leader in developing a plan for applying these concepts in your own team culture



Leading Teams
Focus: Team culture for high-performance
Topics: Trust, constructive conflict, shared commitments, accountability, results
Assessment: Five Behaviors of a Cohesive Team
Supporting Text: *The Culture Code* by Daniel Coyle

Manage to Lead Organization

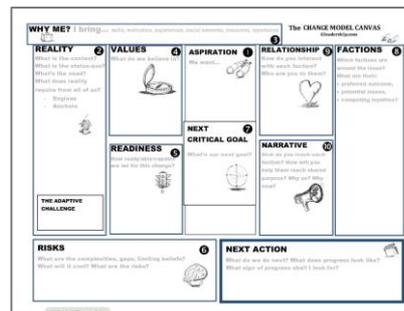
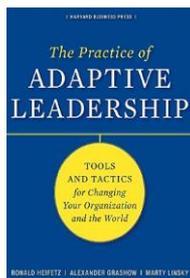
One/two-day workshop designed to build social-awareness and group intervention skills that increase influence



The most difficult leadership task one can undertake is influencing across organizational boundaries or moving a group towards a purpose when we have little or no formal authority. Success in these situations requires a leader to exhibit a complex set of skills. It begins with examining yourself as data, and using this information to diagnose the group's situation. Then, through mindful interventions, a leader can test assumptions, challenge, and support as necessary to keep a group moving forward. Masterful leadership in these moments requires strong empathy, and the ability to hold multiple perspectives simultaneously. Not for the feint of heart, this experiential workshop moves beyond learning "about leadership" and creates the conditions for practicing it by encouraging real-time risk-taking in the classroom.

Specifically, this **Leading Organizations** workshop is designed to:

- Help you to distinguish between when a group faces a technical or an adaptive challenge
- Provide opportunity for you to observe yourself as data and interpret group dynamics
- Offer mindful intervention strategies that surface factions, name the elephant in the room, protect voices, regulate discomfort, and keep groups focused on the work of learning/problem solving
- Introduce Adriano Pianesi's Change Model Canvas[®] to help you assess and strategize for an upcoming initiative where group dynamics, power, and politics must be accounted for



Leading Organizations
Focus: Influence across boundaries; leading without authority
Topics: Group dynamics, power and politics, use-of-self, intervention
Assessment: The Change Model Canvas[®]
Text: *The Practice of Adaptive Leadership* by Ronald A. Heifetz, et al.

Reflections

Comments

Q&A

Closing Poll

Thank you.



[FEEDBACK SURVEY](#)

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