Welcome to the Manage to Lead Immersion Program: Seven Truths to Help You Change the World Online Overview Workshop

Our workshop starts promptly on the hour.

NOTES

• Open CHAT and enter the city from where you are joining.

• We MUTE-ALL while we present; UNMUTE yourself to report-out or answer a question.

• This session is being recorded; all registrants will receive a link to the recording, transcript, and a PDF of the slides.
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Intelligent Strategies. Successful Ventures.

Manage to Lead Immersion Program: Seven Truths to Help You Change the World
Online Overview Workshop

Sponsored by:

Association for Strategic Planning
THINK PLAN ACT
NORCAL CHAPTER

September 5, 2019
The Association for Strategic Planning (ASP):

- Founded in 1999; currently 14 US and international chapters

- Mission: To help people and organizations succeed through improved strategic **Thinking, Planning** and **Action**.

- Leading global, not-for-profit professional association.

- Advances thought and practice in strategy development and deployment for business, non-profit and government organizations.
Instructors

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. UCSF Stanford. ASP Hall of Fame inductee.

Peter DiGiammarino, CEO
- Led teams at AMS (now CGI), Hyperion (now Oracle), SAIC, Compusearch (now Unison) and many others.
- Founded and runs IntelliVen to help leaders, teams, and organizations practically apply behavioral theory to get clear, aligned, and on track to reach their potential to perform and grow.
Sample exits show significant realized value.

<table>
<thead>
<tr>
<th>Business</th>
<th>Realized Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government/Finance Cyber IT</td>
<td>Sold for <strong>3X initial valuation.</strong></td>
</tr>
<tr>
<td>Crowd sourced IP research</td>
<td>Saved from bankruptcy; sold for <strong>$8M.</strong></td>
</tr>
<tr>
<td>Government software and services</td>
<td>Sold for <strong>30+% return</strong> on invested assets.</td>
</tr>
<tr>
<td>Government software and services</td>
<td>Sold for <strong>4X invested capital.</strong></td>
</tr>
<tr>
<td>Industrial computer aided learning</td>
<td>Saved from bankruptcy; sold for <strong>$35M.</strong></td>
</tr>
<tr>
<td>IP Management</td>
<td>Sold for <strong>50X initial valuation.</strong></td>
</tr>
<tr>
<td>IPv6 services</td>
<td>Saved from bankruptcy; sold for <strong>$3M.</strong></td>
</tr>
<tr>
<td>Strategy consulting</td>
<td>Sold for <strong>4X initial valuation.</strong></td>
</tr>
<tr>
<td>Electronic discovery</td>
<td>Sold for <strong>40X initial valuation.</strong></td>
</tr>
<tr>
<td>OD and change management</td>
<td>Sold for <strong>2X initial valuation.</strong></td>
</tr>
</tbody>
</table>
## Case Example

<table>
<thead>
<tr>
<th>Year</th>
<th>Pre-MtL</th>
<th>Post MtL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td></td>
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<tr>
<td>3</td>
<td>5</td>
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<td>4</td>
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<td>7</td>
<td>5</td>
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<td>8</td>
<td>15</td>
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<tr>
<td>9</td>
<td>25</td>
<td></td>
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<tr>
<td>10</td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>

The chart illustrates the revenue growth before and after the introduction of MtL (Maintenance Through Life). The revenue increases significantly post-MtL, showing the effectiveness of the new strategy.
POLL: In your experience, how often are envisioned benefits realized?

Idea-to-Benefit

- Set Intent
- Design and Align
- Communicate and Plan
- Operate
- Implement
MtL turns *insights* into *action* to get the change you want!

Institutionalize the change
Consolidate & build on the gains
Create short term wins
Empower people to act on the vision
Communicate the vision
Develop a clear shared vision
Create a guiding coalition
Establish a sense of urgency

Based on: Kotter, John (1996) *Leading Change*
Agenda
(times are approximate)

• 15’: Welcome
  o Who we are and why we are here
  o How change is supposed to happen and why it doesn’t

• 45’: 7 Truths
  o 5’: WWW introduction
  o 25’: Get Clear WWW exercise
  o 20’: Get Aligned, Plan Change, Do & Review
    Get Help, Focus, and Grow

• 15’: Manage to Lead Immersion Program
  o 10’: MtL Program Summary
  o 5’: Learning Platform

• 10’: Reflections, Comments, Q&A, Closing Poll
Truth. An organization exists to solve a problem for people.

Action.

Get Clear

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

provides...
WHAT

for...
WHO

WHY
they pay for it.
The [name] organization:

**WHAT**
[product or service delivered]

**WHO**
[position/persona of identified buyers]

**WHY**
[better, cheaper, faster solution to important, pervasive, persistent problem]

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The ___Facebook___ organization:

<table>
<thead>
<tr>
<th>WHAT</th>
<th>Social network, ad forum, connection to others in the world,</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO</td>
<td>Everybody, users: anyone with internet access; advertisers</td>
</tr>
<tr>
<td>WHY</td>
<td>Escape reality, create reality, feel community, get news</td>
</tr>
<tr>
<td>provides</td>
<td></td>
</tr>
</tbody>
</table>
The **Facebook** organization:

<table>
<thead>
<tr>
<th><strong>WHAT</strong> provides…</th>
<th><strong>Access to people</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHO</strong> for…</td>
<td><strong>Advertisers</strong></td>
</tr>
<tr>
<td><strong>WHY</strong> they pay for it</td>
<td><strong>Highly targeted segmentation</strong></td>
</tr>
</tbody>
</table>
## WHAT ABCo provides, for WHO, and WHY.

### WHAT

**ABCo provides…**

**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.

### WHO

**for…**

- 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.
Practice Case: ABCo

• 10’: Accept invitation to break into a random group of four:
  • Greet each other and select a reporter.
  • Agree on one or two points you notice about your group’s assigned W.
• 10’: Reconvene and share your group’s points when called upon.
### What AMCBo provides, for WHO, and WHY.

<table>
<thead>
<tr>
<th><strong>WHAT</strong></th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHO</strong></td>
<td>You are residental and home redundant? Are some of these not in 1 and 2? Which are paying customers? Are architects more of a channel?</td>
</tr>
<tr>
<td><strong>WHY</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

### Answers WHO
- AMCBo provides... for residential homeowners and light commercial business owners. Designers/architects/engineers.
- For current clients.
- Our skill set and personalities suit working with end users.

### Answers WHY
- They pay for it. To keep relationship continuity.
- 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.

### Answers WHAT
- Residential remodeling services...
- Designers/architects/engineers
- For current clients.
- With certain income/wealth?
- At a certain age, stage or circumstance?

### Answers HOW
- In SF? Bay Area? North Bay? Profile:
- With certain income/wealth?
- At a certain age, stage or circumstance?
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.
Truth. It takes a team.

Action.

Get Aligned

Decide what kind of leader to be and collect followers.
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

Action.

Plan Change

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

**Imagined**

Offsite → Implementation → Thriving

Benefits realized.

**Actual**

Offsite → Implementation → Flat-lined

Same meeting next year!
Turn *Initiatives* into Action

**Overall Change Framework**

**Multiple Change Frameworks**

**Initiative to Action Template**

- **Opportunity:**

- **Approach:**

- **Time Table:**

- **Considerations:**
Truth. It pays to pay attention.

Action.

Do & Review

Take action.
Review what happens.
Set up a **System of Governance**

Over 90% of initiatives fail to achieve their full promise due to a lack of management attention. To address this, consider the following steps:

1. Consolidate & build on the gains
2. Create short-term wins
3. Empower people to act on the vision
4. Communicate the vision
5. Develop a clear shared vision
6. Create a guiding coalition
7. Establish a sense of urgency
Truth. No leader succeeds alone.

Action.

Get Help

Build a board. Retain experts. Get a coach.
Set up a System of Support for Success

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

Inside the organization
Outside the organization
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.

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

- First clients
- First employees
- Revenue/Funding

- Plan
- Leadership
- Drive

- Going Concern
- Sale or Finance
- IPO

**CONCERNS**
- Get Started
- Proof
- Survival
- Focus

- Execution
- Growth
- Performance

- Payoff
- Managing Growth

- New Growth
- Complacency

**STAGE**
- Concept
- Startup
- Credible
- Sustainable
- Mature
The Seven Truths: disarmingly simple…and NOT easy!

- Get Clear
- Get Aligned
- Plan Change
- Do & Review
- Get Help
- Focus
- Grow
<table>
<thead>
<tr>
<th>WHAT</th>
<th>Provides...</th>
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<tbody>
<tr>
<td></td>
<td>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.</td>
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<table>
<thead>
<tr>
<th>WHO</th>
<th>for...</th>
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<tbody>
<tr>
<td></td>
<td>Leaders and their teams of 3 to 7, who run an organization:</td>
</tr>
<tr>
<td></td>
<td>• PE/VC-backed</td>
</tr>
<tr>
<td></td>
<td>• Baby-boomer founder/owner/operator preparing for transition</td>
</tr>
<tr>
<td></td>
<td>• Start-up entrepreneur</td>
</tr>
<tr>
<td></td>
<td>• Leader of a significant internal unit or function</td>
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<table>
<thead>
<tr>
<th>WHY</th>
<th>pay for it.</th>
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<td></td>
<td>In order to:</td>
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<tr>
<td></td>
<td>• Make a specific change to perform better and/or grow faster.</td>
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<tr>
<td></td>
<td>• Develop core messages to stakeholders (employees, clients, investors, partners, recruits, etc.).</td>
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<td></td>
<td>• Have a shared team experience working ON the business: Your Case IS the Course!</td>
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</table>
Your Case *IS* the Course
in our Flipped Classroom, Experiential Learning Model

<table>
<thead>
<tr>
<th>Prep</th>
<th>Core Program</th>
<th>Support</th>
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<tbody>
<tr>
<td>1-2 MONTHS PRIOR</td>
<td>WEEK 1: LAUNCH</td>
<td>EVERY 4 MONTHS</td>
</tr>
<tr>
<td>Set Expectations &amp; Goals</td>
<td>Get Loose</td>
<td>Learning Community Share Experiences, Lessons, New Content</td>
</tr>
<tr>
<td>2-4 WEEKS PRIOR</td>
<td>WEEK 2: GET READY</td>
<td>QUARTERLY</td>
</tr>
<tr>
<td>Get Team Buy-in</td>
<td>Get Clear: WWW</td>
<td>2-3 Hour Executive Sessions</td>
</tr>
<tr>
<td>1 WEEK PRIOR</td>
<td>WEEK 3: GET READY</td>
<td>ONGOING COACHING</td>
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<tr>
<td>Complete Pre-Work</td>
<td>Get Clear: HOW</td>
<td></td>
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<td></td>
<td>WEEK 4: GET READY</td>
<td></td>
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<td>Get Clear: HOW WELL</td>
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<td>WEEK 5: GET READY</td>
<td></td>
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<td></td>
<td>Get Aligned</td>
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<td></td>
<td>WEEK 6: GO</td>
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<td></td>
<td>Plan Change</td>
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<td>WEEK 7: GO</td>
<td></td>
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<td></td>
<td>Do &amp; Review</td>
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<td>WEEK 8: GUIDE</td>
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<td></td>
<td>Get Help</td>
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<td>WEEK 9: GUIDE</td>
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<td>Grow</td>
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<td></td>
<td>WEEK 10: Executive Review</td>
<td></td>
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<td></td>
<td>SUBMIT FINAL PROJECT</td>
<td>Certificate Awarded</td>
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<td>WEEK 11:</td>
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<td></td>
<td>EMAIL AND PHONE SUPPORT</td>
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</table>

Click for a program walkthrough.
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.
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:

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Thank you.