

Manage to Lead (MtL) Workshop

Peter DiGiammarino

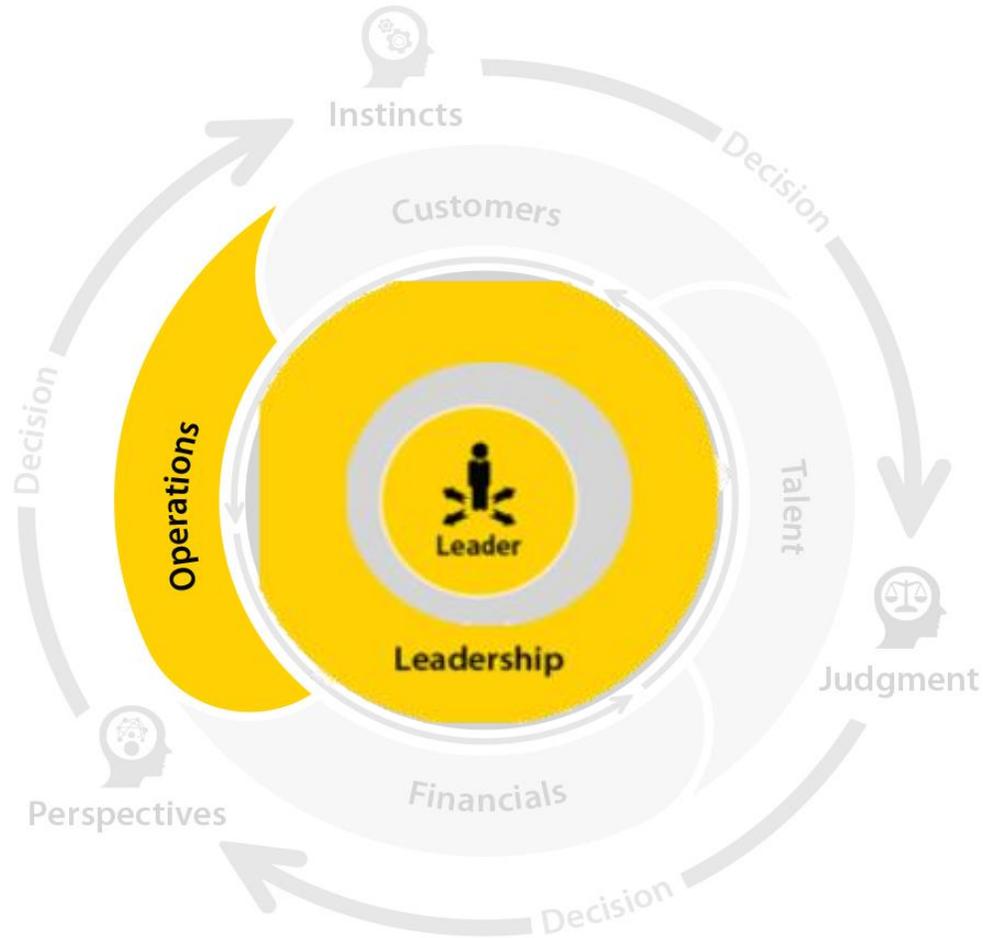
intelliVen

Intelligent Strategies. Successful Ventures.

VISTAAGE

OBJECTIVE: Provide CEOs with Best-Practice Tools to Support Operations

Vistage Decision Model



Key Decision in Operations:

What problem does our company solve for whom?

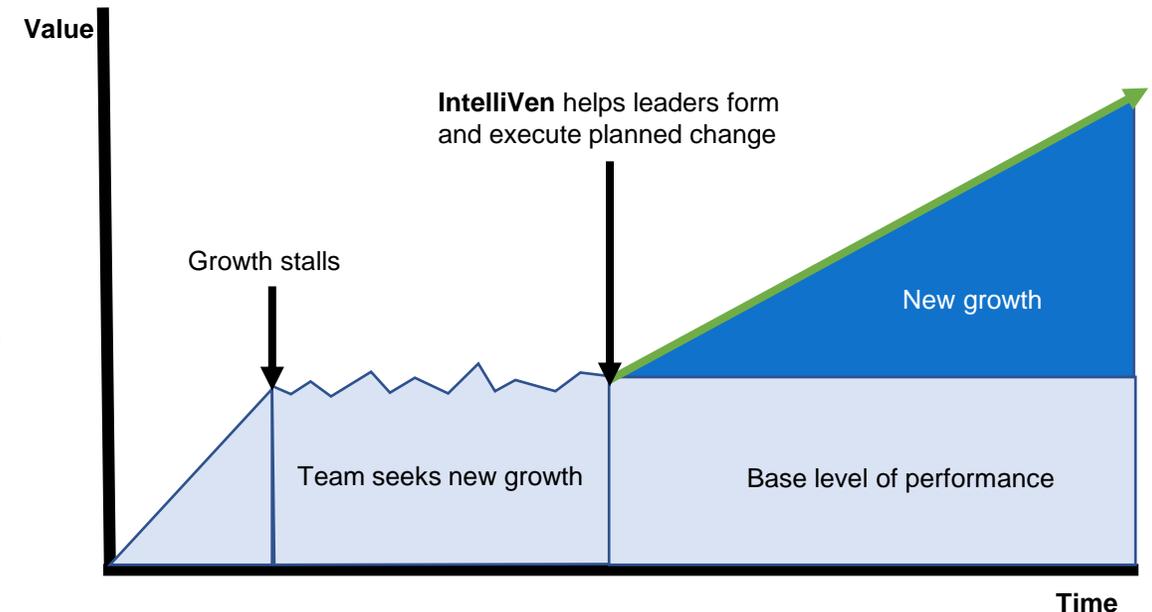
Approach

- 10': Introduce PeterD and MtL
- MtL Tool: WHAT-WHO-WHY
 - 15': Introduce MtL Tool
 - 20': Example Case
 - 30': Practice Case
 - 30': Your Case
- 10': How to access MtL Tools
- 5': Wrap-up

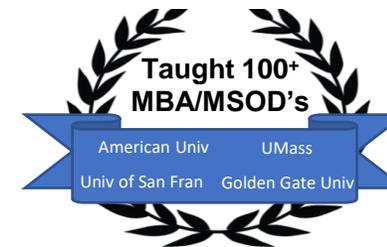
Note: All times are approximate

Operating executives provide practical support to leaders and their teams to **GET CLEAR. ALIGN. GROW.**

- Using a proprietary approach that helps leaders take their organizations to the next level
- Based on lessons learned successfully leading dozens of management teams through inflection points
- Providing tools, methods, and principles ... not answers or judgments ... for leaders to use as they see fit
- Cultivating independent competence



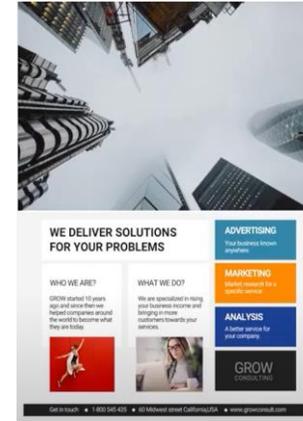
[Manage to Lead: Seven Truths to Help You Change the World](#)
Peter F. DiGiammarino



Every business eventually needs:



A pitch-deck / management presentation, Confidential Information Memorandum (CIM), financial model, and teaser to support efforts to secure financing or a sale.



Website and marketing collateral to attract and educate recruits, partners, prospects, and customers.



To ramp up new board and executive team members.



To launch strategic initiatives to implement planned change.

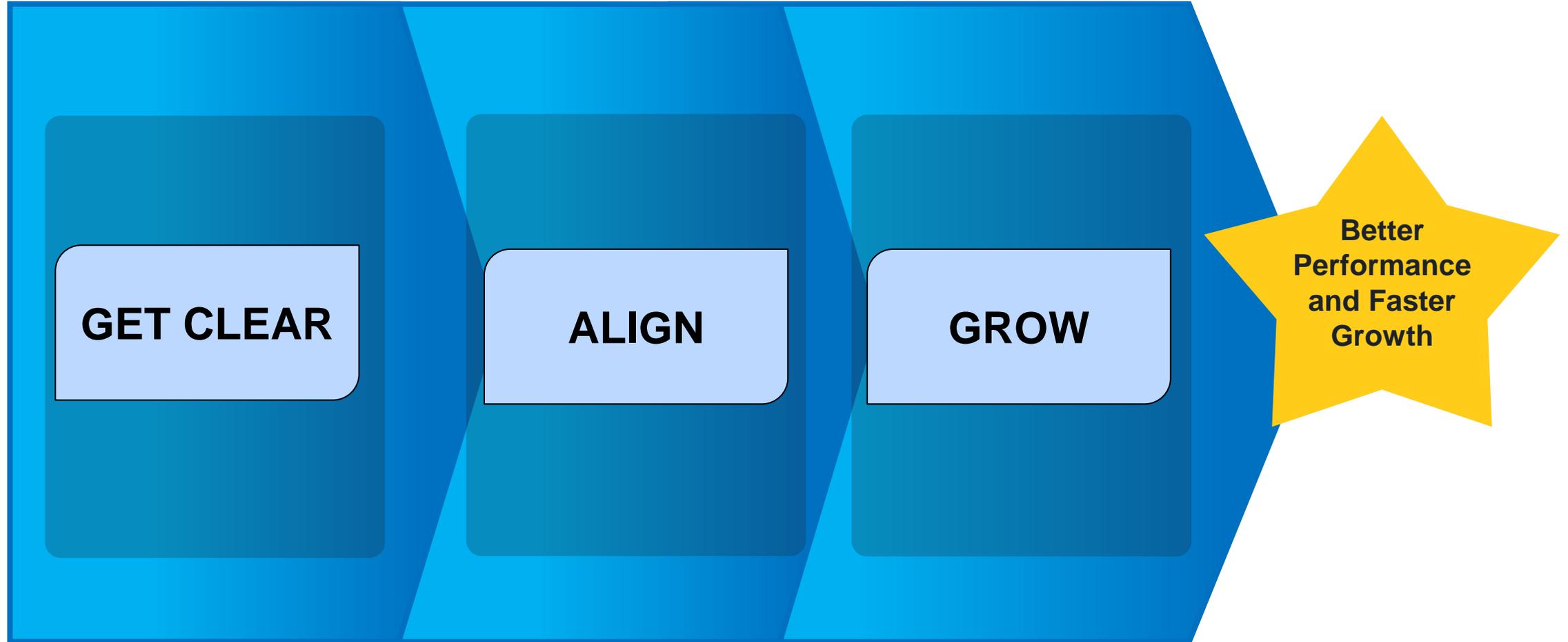
What is needed:

- Mandate to accomplish something specific
- Mission / Vision / Values / Culture
- Operating / Business **Plan** that explains:
 - **How the organization works now**
 - How it **plans** to work in the future
 - What it **plans** to do to achieve that future

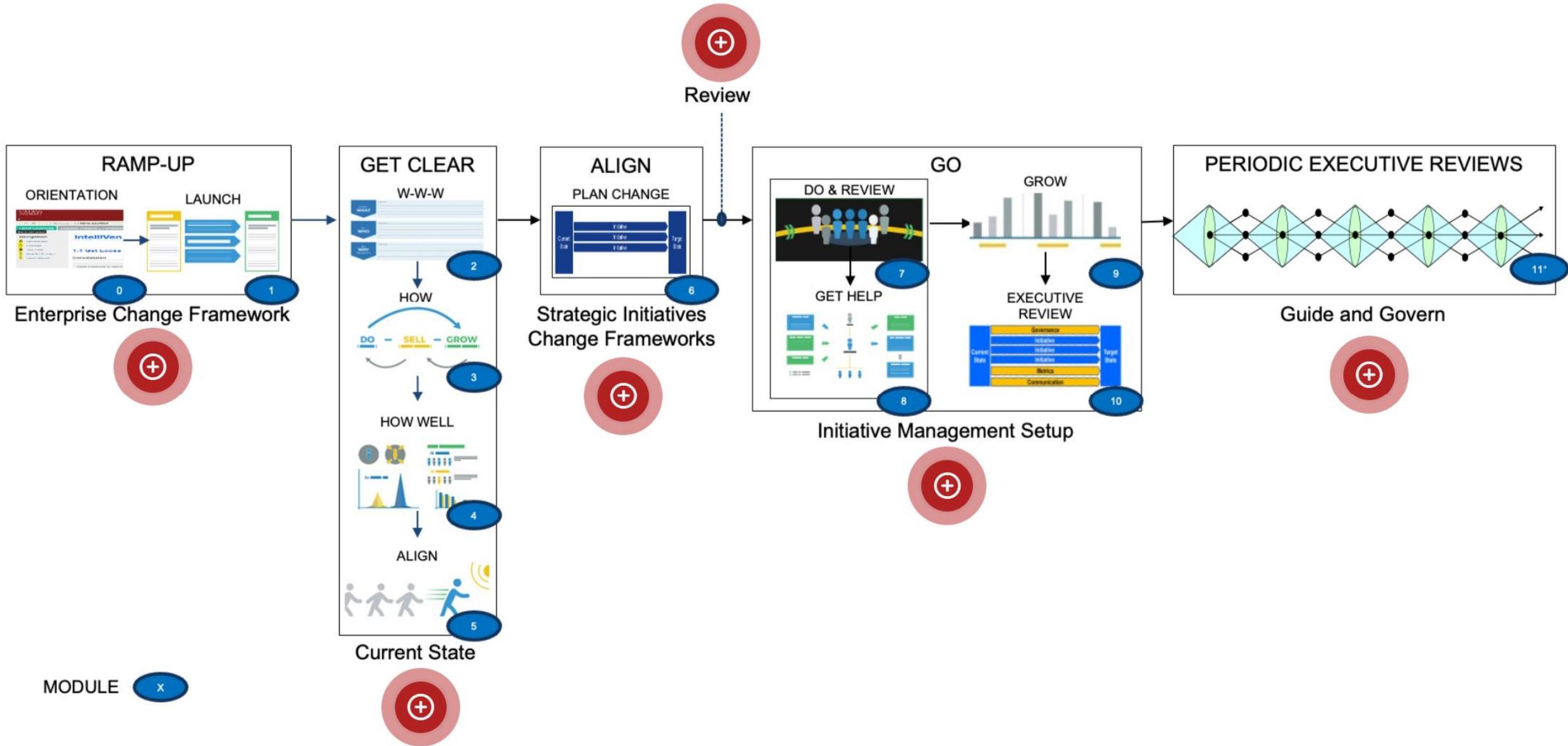
MtL Workshop Focus



MtL SUPPORTS A THREE-PHASED APPROACH



MtL System Modules



MtL SUPPORTS A THREE-PHASED APPROACH

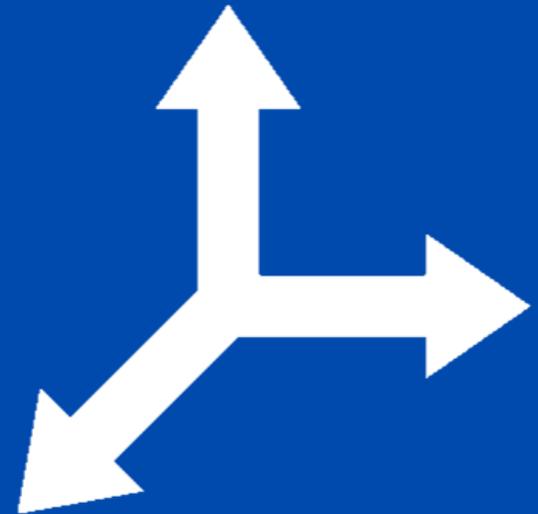


Truth. An organization exists to solve a problem for people.

Action.

Get Clear

Know whose problem you solve, how, and how well.



The _____**[name]**_____organization:

provides... WHAT	[product or service delivered]
for... WHO	[position/persona of identified buyers]
WHY they pay for it.	[better, cheaper, faster solution to important, pervasive, persistent problem]

Most team members have different perceptions.

CEO

WHAT: Finance workflow solution
WHO: Fortune 500 CFOs
WHY: We are market leader

COO

WHAT: Cloud finance platform
WHO: Companies
WHY: High uptime

W-W-W alignment test reveals divergent views

provides... WHAT	WHAT IS DELIVERED?
for... WHO	WHO MAKES THE DECISION TO BUY?
WHY they pay for it.	WHY TO THEY PURCHASE FROM YOU?

CMO

WHAT: Software for accounting
WHO: CPAs
WHY: They trust us

CTO

WHAT: Automated balance sheet
WHO: Expense managers
WHY: Great code

The Facebook organization:

provides... WHAT	
for... WHO	
WHY they pay for it.	

Practice Case: Facebook



OBJECTIVE: Discern an organization's W-W-W.

INSTRUCTIONS:

2': Go to: [INTELLIVEN.COM](https://intelliven.com) > TOOLBOX > WHAT-WHO-WHY > TEMPLATE.

- Enter "Facebook" as the Organization
- With Facebook in mind, work a partner to enter what you first think of for WHAT, WHO, and WHY

3': Share and discuss entries.

The Facebook organization:

provides... WHAT	
for... WHO	
WHY they pay for it.	

The Facebook organization:

provides... WHAT	A place to store and access pictures and stories.
for... WHO	Everyone.
WHY they pay for it.	To stay connected with those you care about.

The Facebook organization:

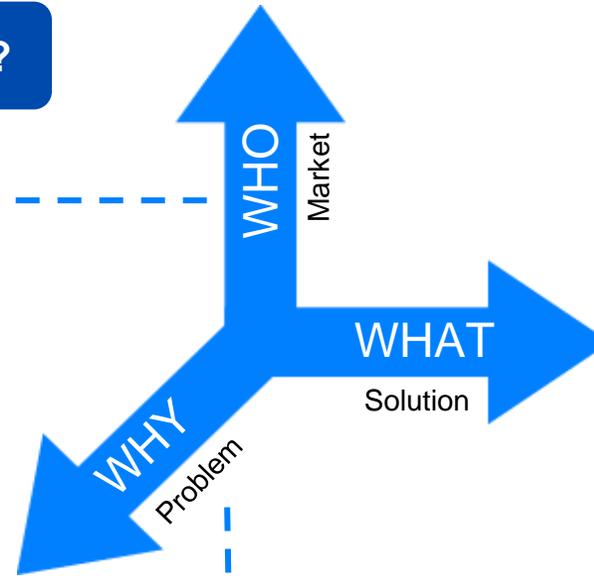
provides... WHAT	Access to people
for... WHO	Advertisers
WHY they pay for it.	Highly targeted segmentation

IDEAL WHOs and WHYs HAVE SPECIFIC CHARACTERISTICS

WHAT MAKES AN IDEAL WHO?

Ideal WHO:

- Has the problem
- Finds it strategic to solve
- Has resources
- Can be reached
- Is good to work with



WHAT HAPPENS WITH:

- Many W-W-Ws
- Nested W-W-Ws
- Global W-W-Ws
- One or two, but not three, Ws

Ideal Problem is:

- **Important** – i.e., it is strategic to solve
- **Pervasive** – i.e., many have it (large market)
- **Persistent** – i.e., does not go away
- **Nested** – i.e., A small part of a bigger problem
- **Nearby** to other important, pervasive, and persistent problems

WHAT MAKES AN IDEAL WHY?

W-W-W Work Stream

1. Team members each individually fill-in and submit a W-W-W for their organization.
2. Facilitator:
 - Annotates individual inputs
 - Reviews 1x1 with each team member
 - Shares with the leader
3. Coach and leader organize input and facilitate session(s) to consolidate a W-W-W.

WHAT BigSpeak provides, for WHO, and WHY

Executive 1
Input

DISCUSS: WHAT COMES TO MIND AS WE READ EXECUTIVE 1's INPUT?

WHAT BigSpeak provides, for WHO, and WHY

BigSpeak
provides...
WHAT

Keynote Speakers and additional content or personal/professional development

Should this word be "for"?

Are speakers curated or vetted in some specific way?

What kind of personal/professional development? Do you use a methodology? Is it proprietary?

for...
WHO

Corporate, Association, Non-Profit, University and Government Organizations.

These are types of organizations. Types of organizations don't purchase anything. People do! **WHO** in organizations of these types make the decision to hire: CEO, head of HR, a functional or unit leader? Do clients tend to be of at least a certain scale? Are clients all over the world? How would you build a list of prospects to approach and cultivate?

Explains why **WHO** hires speakers but not **WHY** they hire speakers from BigSpeak.

and...
WHY
they pay for it

Awakening greatness within their people, through inspirational speakers delivering educational content.

More **WHAT** than **WHY**

Practice Case: BigSpeak



OBJECTIVE: Reflect and react to an executive's W-W-W.

INSTRUCTIONS:

2': Read Executive 2's W-W-W (on the next slide) silently:

- Strive to understand
- Note observations, questions, and impressions

13': Break into groups:

- Select a recorder.
- Select a W and discuss your group's reactions to it.
- Agree on two points to share with the full group.
- Repeat with another W as time permits

10': Reconvene to share your group's points.

The __BigSpeak__ organization:

provides... **WHAT**

Speakers that provide high expertise to companies for keynotes, break-out sessions and on-going learning to expose people to new ideas and experiences.
Tools for personal growth and better ways of being and living,

Are the Tools provided to, or by, the speakers?

More WHY than WHAT

This sounds like a WHAT

Companies are WHO not WHAT

This explains WHY they want speakers

for... **WHO**

Influencers, Executives and Event Planners within Businesses, Associations, Universities and Non-profits.

This is incredibly (too) broad. Where would one start to build a list of people to offer your WHAT?

The best solution to what problem?
Nailing this is key to a good WHY

Go through your last N sales and ask WHY they chose to do business with BigSpeak over other options.

Trusted Partner who:
demonstrates deep listening and understands our needs
makes me feel rest assured that they are providing the best solution for my organization

- Has an easy process to provide curated and vetted experts for our group
- Is completely vested in the outcome

Sounds like HOW not WHY people buy it from you

This sounds like a WHY

How so?

BigSpeak's WWW for Talent Clients

WHAT

provides...

Trusted partner who nurtures, manages and grows my speaking business, providing:

- Personalized representation and consultation to meet my dynamic speaking objectives.
- Connection to Fortune 1000 companies and major associations.
- Centralized and streamlined process of speaking, with transparency and integrity

for... WHO

Established speakers:

- Speaking footage in front of audience, good lighting, audio and delivery
- Notable achievements: founding companies, best seller, viral footage, associated with big brands, relevant to the times.
- Speaking fees of \$15K or above, generating at least \$50K annually in commissions.
- Additional sourcing partners include: PR Companies, Literary Agents, Management Companies & Speaker Bureaus.

Why

they pay for it.

My team at BigSpeak values me as a partner, and treats me like family. Their expert solutions make my life easier. I'm excited and confident that I've made the right choice in my agency/partner

W-W-W Takeaways

Preparing a W-W-W is more of a challenge than it first seems.

It's straightforward for a team to upgrade its W-W-W ... but it takes real effort.

It is worth the trouble for a team to work on their W-W-W.

Alignment follows clarity reached jointly.

Your Case:



OBJECTIVES: Draft W-W-W for Forma Construction.

INSTRUCTIONS:

3': Review the Forma Construction W-W-Ws submitted in advance by participants on the next slide

12': Break out into groups of two or three and discuss:

- Common themes
- Questions entries raise
- Points of dissonance
- Upgrade suggestions

10': Reconvene to discuss points

5': Reflect on the experience.

The _____ organization:

provides... WHAT	
for... WHO	
WHY they pay for it.	

Forma Construction WHAT-WHO-WHY: EXECs

	Exec 1	Exec 2	Exec 3	Exec 4
<p>provides...</p> <p>WHAT</p>	<p>A highly collaborative environment in which to work closely with architects, designers and clients to build high-quality custom homes.</p>	<p>General contracting, project management and self performed trade specific craft for home construction projects. It's not just about the finished product, it's the process before, during and after the product is built.</p>	<p>Complex and highly detailed residential construction projects</p>	<p>Top of the line, specifically tailored homes that are architecturally and design driven, that may have complex engineering and design constraints, that have the most modern home automation and security features, that look like museum pieces when completed.</p>
<p>for...</p> <p>WHO</p>	<p>The primary "Who" is the client/homeowner, but architects, designers and others are a secondary "Who" that is instrumental to Forma's success. If Forma consistently delivers the "What", those relationships can lead to not only repeat projects with existing clients, but new introductions to others looking for what Forma has to offer.</p>	<p>For homeowners expecting an exceptional product and experience.</p>	<p>Luxury Clients</p>	<p>Highly discerning, portfolio diversified clients that expect turnkey service, expect only the best results, want a clear path of construction and completion with pricing and schedule that can be counted on.</p>
<p>WHY</p> <p>they pay for it.</p>	<p>To access Forma's experience, craftsmanship and ability to bring together all the relevant facets of the building process to deliver a great experience and a unique home for the client.</p>	<p>Because we are committed to transparent business practices and proactive project management. We stand behind our work and take care of our clients when we don't live up to that promise.</p>	<p>Because of our people, process and product</p>	<p>Because Forma has a track record of success. Forma is highly respected for our service and work. We have the experience, resources and people to accomplish the work. We are able to meet their expectations of personal service.</p>

Forma Construction WHAT-WHO-WHY: PEERS

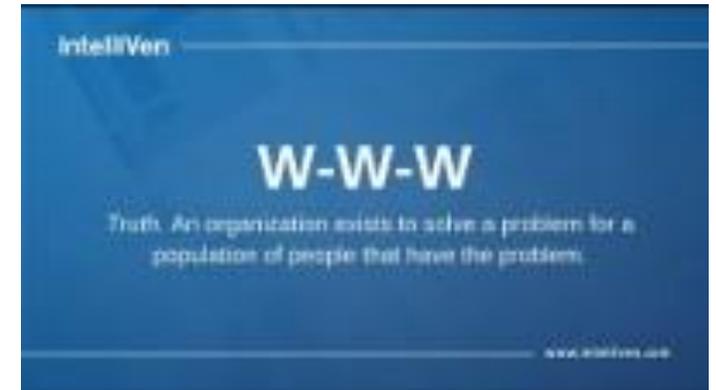
	CEO 1	CEO 2	CEO 3
<p>provides...</p> <p>WHAT</p>	<p>Precision built residences and projects revolving around great communication and ingenuity.</p>	<p>Residential construction projects. This includes project management working with the architect, designer and others to build new and remodel.</p>	<p>Building fine and over the top quality housing</p>
<p>for...</p> <p>WHO</p>	<p>Discerning clients seeking to be ahead of the trend</p>	<p>High net worth individuals</p>	<p>Affluence clients, client looks for details unique, price is not priority, quality work</p>
<p>WHY they pay for it.</p>	<p>Forma treats every project with absolute conscientiousness to our clients every need from inception to completion.</p>	<p>They want something unique and the best quality</p>	<p>Service and quality</p>

Forma Construction WHAT-WHO-WHY: OTHERS

	Group Facilitator	Outside Exec 1	Outside Exec 2
<p>provides...</p> <p>WHAT</p>	<p>Exclusive/Premium residential construction and project management.</p>	<p>Pre-construction services Construction services Post-construction services</p>	<p>Preconstruction design collaboration, estimating, bidding, permitting, vendor sourcing. Construction building services, project management, budget tracking, consultant coordination. Post-construction maintenance and service calls. We assign a dedicated project manager for the duration of a project. Proactive management – which includes preconstruction risk assessments and cost reviews; weekly construction updates and budget reviews; subcontractor tracking and auditing; pre-occupancy quality check; postconstruction maintenance and service calls – provides a seamless client experience.</p>
<p>for...</p> <p>WHO</p>	<p>Very discerning, prestigious Greater Bay area homeowners.</p>	<p>High-end residential clients</p>	<p>families, and for our discerning clients that want custom homes to major remodels and historic rehabilitations. for clients who need smaller-scale contractor services but demand the high-quality service that FORMA Construction consistently provides.</p>
<p>WHY they pay for it.</p>	<p>They hire Forma because of direct reputation on similar high-end projects, ultra positive referrals from partners, like architects and because of Victor's personal connections.</p>	<p>Clients want white-glove service from the initial design collaboration phase through on-going post-construction maintenance and service calls. Clients want a partner to manage every phase of their project and beyond to the highest standard.</p>	<p>guarantees that regardless of scale, type and budget, our clients will get the best fit for their project. By committing to a select group of projects at any one time, this guarantees our full attention to quality, cost, and schedule. Forma is built on ethics, expertise, excellence. These shared values engage clients and collaborators, such as architects, interior designers, and consultants – so our construction team can deliver exceptional results. With every home, we make a promise to build with the highest integrity, quality, and consideration for our clients.</p>

Tips for filling out a W-W-W

- **Alignment follows clarity reached jointly** (vs. assumed, mandated, or ignored).
 - **Watch for:**
 - Missing W(s)
 - Multiple W-W-Ws
 - Strive for **clarity** and **agreement over perfection**; it is more important for leaders to agree on the same W-W-W than to get the right W-W-W.
 - What is **right is what a team decides** together.
 - A good, better, and best **W-W-W evolves with iteration, reflection, and use.**
 - **W-W-W can stand alone and/or be incorporated into Mission, Vision, Values, et al.**
- **Words matter:**
 - Use **present tense.**
 - Begin **What Must Be Done** entries with verbs.
 - Use **common (not jargon), one-syllable words** and **simple phrases** that are easy for anyone to understand.
 - Be specific...**more specific than you are generally comfortable** being.
 - **Focus on an ideal next customer** rather than on not excluding every possible customer.
 - **Say what you say only once** and **in the section in which it belongs.**
 - Stick to **facts...not beliefs**. Everything in the W-W-W is subject to proof.



[Get Clear W-W-W Tutorial](#)

Suggested Next Steps

provides...
WHAT

Type here

for...
WHO

Type here

and...
WHY
they pay for it

Type here



- Consolidate W-W-W for:
 - Your CEO Group
 - Your top team
 - Each others' teams
 - Other organizations you affiliate with

- Draw on other MtL Tools

- Use MtL Workstreams

Manage to Lead

A System for Breakthrough Business Performance

The **IntelliVen Manage to Lead (MtL) System** is a set of integrated tools, workstreams, and tutorials for architecting, building, governing, and changing your business for breakthrough improvements in performance and growth.

GET STARTED NOW



Above: Watch the 1-Minute MtL Teaser

[Learn More: Watch the 30-minute Demo of the IntelliVen MtL System with a Real Client](#)

Thank you.

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Intelligent Strategies. Successful Ventures.

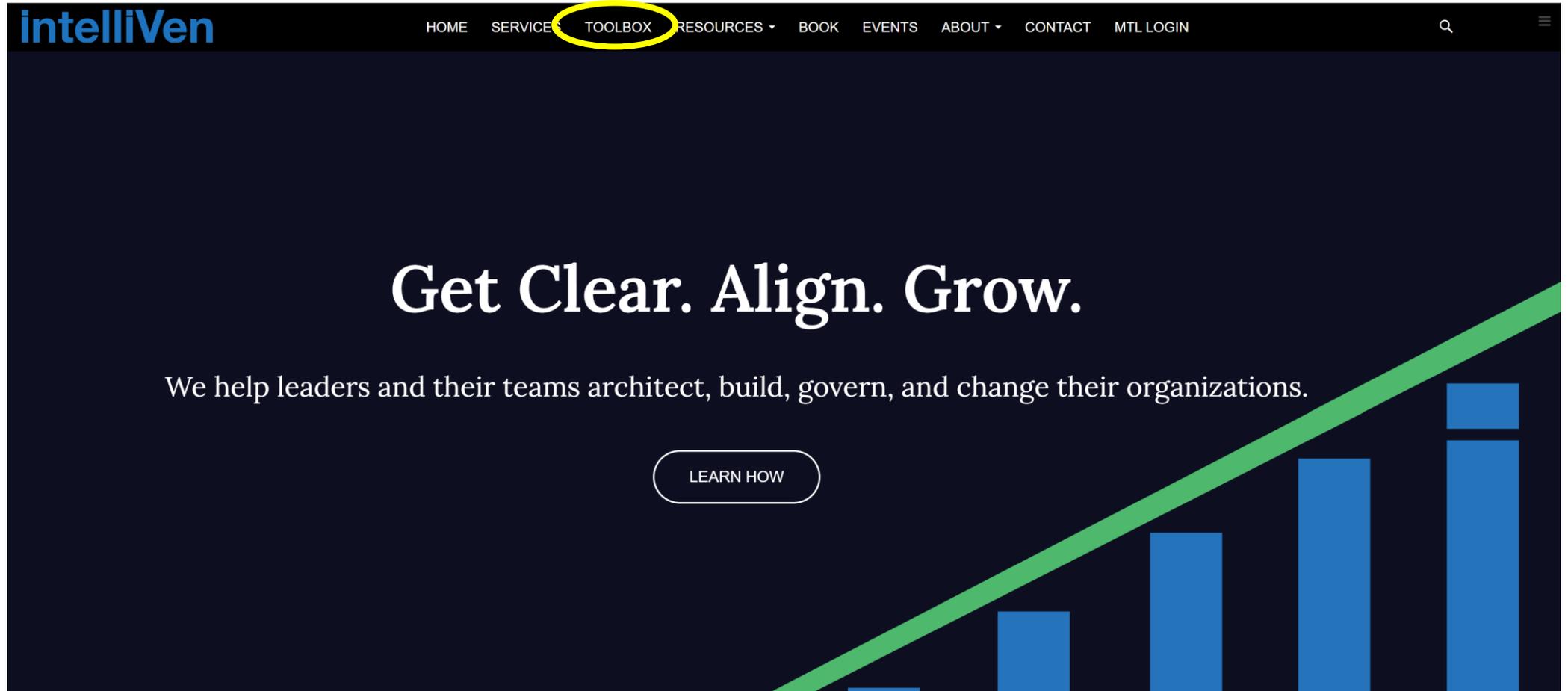
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1. Open www.intelliven.com

2. Click TOOLBOX



3. Click WHAT-WHO-WHY

TOOLBOX

Manage to Lead Tools and Templates

857 provides, for WHO, and WHY 29

provides: **WHAT**

for: **WHO**

and: **WHY**
They pay for it.

WHAT-WHO-WHY
A business solves a problem for a customer.

1,058 **Change Framework** 38

CASE FOR CHANGE
What good things happen if we change?
What bad things happen if we do not?

CURRENT STATE
How things are now

TARGET STATE
How things will be after the change.

STRATEGIC INITIATIVES
What must be done to attain the Target State

BARRIERS
What inhibits the change?
What accelerates the change?

Change Framework
Context matters.

720 **Leader Support** 27

Accountability Board
Subject Matter Experts
Executive Coach

Learning Community
Peer Group
Core Leadership Group
Leadership Community

Leader
Workers

Leader Support
Get good at getting help.

408 14

198 2

190 3

4. Skim the description

5. Open the TEMPLATE

intelliVen HOME SERVICES TOOLBOX RESOURCES BOOK EVENTS ABOUT CONTACT MTL LOGIN

JOIN OUR COMMUNITY

Email Address
[JOIN US!](#)

FOLLOW US

[in](#) [Twitter](#)
[a](#) [YouTube](#)

BUY THE BOOK

[Manage to Lead](#)

CATEGORIES

- Presentations
- Executive
- Transition
- Executive
- Assessment
- Position
- Descriptions
- News
- Book Reviews
- Executive Reviews
- Finance Matters
- People Matters
- Sales Matters
- Compensation
- Job Search
- Uncategorized

WHAT-WHO-WHY 29 853

WHAT Type Name provides, for WHO, and WHY

TOOL

PDF PPT

TEMPLATE

SUMMARY

[MtL System Module 2](#) shows how to use the **WHAT-WHO-WHY** template to communicate **WHAT** the organization provides, to **WHOM**, and **WHY** customers opt to purchase from the organization.

[MtL Tutorial Module 2](#) provides background, instruction, practice cases, and input prompts that prepare leaders to use the **WHAT-WHO-WHY** Framework.

It is a fundamental truth that **an organization exists to solve a problem for people.**

Think about every organization you know. Companies, social groups, governments, community organizations, faith-based groups, non-profits, and social interest advocacy groups were all formed because of an identified problem.

Sometimes the problem might be affecting members of the group and they organize to address it.

Other times the problem might be affecting someone else. In those cases, the organization

Related Content

TOOLS [See All](#)

[Solution Architecture](#)

INSIGHTS [See All](#)

[How to Get Clear](#)

[The Power of Clarity](#)

POSTS [See All](#)

[Get Clear](#)

[How Core Leaders get clear about what problem their organization solves for whom.](#)

[How to decide what problem to solve.](#)

[How to decide who to sell to next.](#)

[What makes an exceptional W-W-W](#)

[Tips to consultants helping organization leaders create THEIR WHAT-WHO-WHY](#)

SERVICES [See All](#)

[Strategy Offsite](#)

[WHAT-WHO-WHY Alignment Sessions](#)

VIDEOS [See All](#)

[Interview: Introduction to PeterD and Manage to Lead Overview](#)

6. Enter input and realize expert feedback would help

7. Return to the toolbox entry for help

intelliVen

How to use the template

Click on input fields to type or paste-in appropriate text.
Enter name and email address in spaces provided beneath to receive a formatted copy
and to submit to IntelliVen for feedback.

WHAT Type Name provides, for **WHO**, and **WHY**

provides...
WHAT

Type here

for...
WHO

Type here

and...
WHY
they pay for it

Type here

8. Note MtL System Module 2 shows how to use the W-W-W

9. Login to MtL System

intelliVen HOME SERVICES TOOLBOX RESOURCES BOOK EVENTS ABOUT CONTACT **MTL LOGIN**

JOIN OUR COMMUNITY
Email Address
JOIN US!

FOLLOW US
in, Twitter, Amazon, YouTube

BUY THE BOOK
Manage to Lead

CATEGORIES
Presentations, Executive, Transition, Executive, Assessment, Position, Descriptions, News, Book Reviews, Executive Reviews, Finance Matters, People Matters, Sales Matters, Compensation, Job Search, Uncategorized

WHAT-WHO-WHY

29 853

WHAT Type Name provides, for WHO, and WHY

WHAT, WHO, WHY

TOOL
PDF, PPT, TEMPLATE

SUMMARY

MtL System Module 2 shows how to use the **WHAT-WHO-WHY** template to communicate **WHAT** the organization provides, to **WHOM**, and **WHY** customers opt to purchase from the organization.

MtL Tutorial Module 2 provides background, instruction, practice cases, and input prompts that prepare leaders to use the **WHAT-WHO-WHY** Framework.

It is a fundamental... for people.

Think about every organization you know. Companies, social groups, governments, community organizations, faith-based groups, non-profits, and social interest advocacy groups were all formed because of an identified problem.

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Related Content

TOOLS See All
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Get Clear
How Core Leaders get clear about what problem their organization solves for whom.
How to decide what problem to solve.
How to decide who to sell to next.
What makes an exceptional W-W-W
Tips to consultants helping organization leaders create THEIR WHAT-WHO-WHY

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VIDEOS See All
Interview: Introduction to PeterD and Manage to Lead Overview

10. Open Module 2. Get Clear: WHAT-WHO-WHY

UMASS AMHERST

Peter DiGiammarino 26

My UMass Amherst

Modules

intelliVen
Manage to Lead System

Modules

1. [Get Loose](#) A↓

- It is important to be open to new ways of looking at things.
- Ideas get conceived, designed, implemented, and into operation as they go from Idea-to-Benefit.
- Many things keep Ideas from generating envisioned Benefits.
- Tools: Idea-to-Benefit, Enterprise Change Framework, Strategy Terms

2. [Get Clear - WHAT-WHO-WHY](#) A↓

- An organization exists to solve a problem for those who have the problem.
- Leaders who all describe "WHAT their organization provides to WHO and WHY customers pay for it" in the same way perform better.
- It takes time and effort to work out a good, better, or best WHAT-WHO-WHY; and it is doable and worth doing.
- Tools: WHAT-WHO-WHY, Solution Architecture

3. [Get Clear - HOW](#) A↓

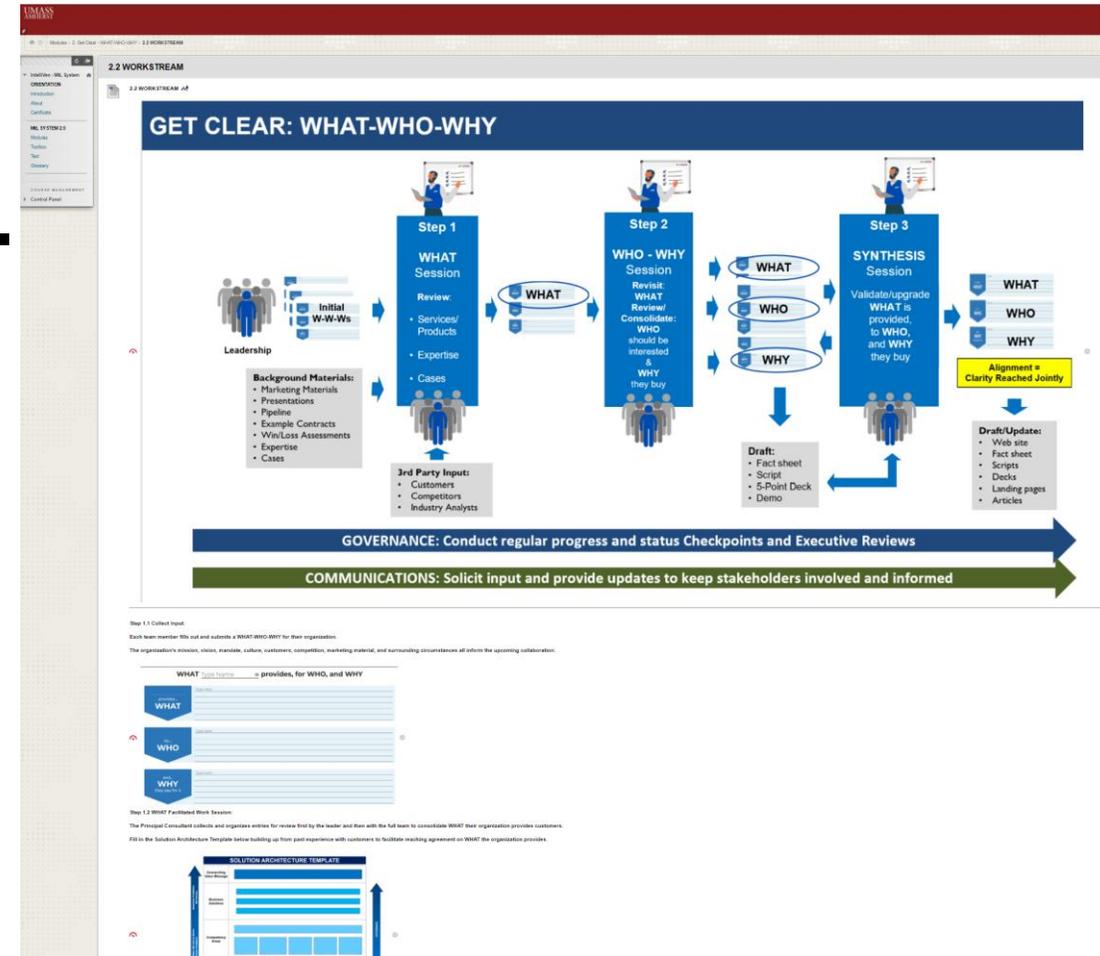
- Every organization Does (DO), Sells (SELL), and Grows (GROW).
- At any given point in time, one of the three DO-SELL-GROW systems most constrains organization performance and/or growth.
- There are five basic operating (DO) models: Product, Service, Channel, Operation, and Exchange.

Open 2.2 WORKSTREAM

The screenshot displays the UMMASS Amherst course management system interface. At the top, the UMMASS Amherst logo is visible. Below it, a breadcrumb trail shows 'Modules > 2. Get Clear - WHAT-WHO-WHY'. The main content area is titled '2. Get Clear - WHAT-WHO-WHY' and contains three items: '2.1 TUTORIAL' (represented by a folder icon), '2.2 WORKSTREAM' (represented by a folder icon and circled in yellow), and '2.3 MORE' (represented by a document icon). A left-hand navigation menu is open, showing 'IntelliVen - MTL System' with sub-sections for 'ORIENTATION' (Introduction, About, Certificate), 'MTL SYSTEM 2.0' (Modules, Toolbox, Text, Glossary), and 'COURSE MANAGEMENT' (Control Panel).

11. Review recommended process for collaborating with your team to craft a W-W-W

12. Invite team members to fill out a W-W-W and compare entries.



13. Realize it is harder than first realized to consolidate a W-W-W

WHAT: Finance workflow solution
WHO: Fortune 500 CFOs
WHY: We are market leader

WHAT: Cloud finance platform
WHO: Companies
WHY: High uptime



CEO



COO

W-W-W alignment test reveals divergent views

WHAT	WHAT is delivered?
WHO	WHO makes the decision to buy?
WHY	WHY do they purchase from you?

WHAT: Software for accounting
WHO: CPAs
WHY: They trust us



CMO



CTO

WHAT: Automated balance sheet
WHO: Expense managers
WHY: Great code

14. Open 2.1 TUTORIAL for tips on how to fill out a W-W-W

UMASS
AMHERST

Modules > 2. Get Clear - WHAT-WHO-WHY

2. Get Clear - WHAT-WHO-WHY

- 2.1 TUTORIAL**
- 2.2 WORKSTREAM**
- 2.3 MORE**

IntelliVen - MTL System

ORIENTATION

- Introduction
- About
- Certificate

MTL SYSTEM 2.0

- Modules
- Toolbox
- Text
- Glossary

COURSE MANAGEMENT

- Control Panel

15. Skim content outline and then Launch Tutorial

UMASS AMHERST

Modules > 2. Get Clear - WHAT-WHO-WHY > 2.1 TUTORIAL

2.1 TUTORIAL

2.1 TUTORIAL OUTLINE

Topic Guide: 2 Get Clear W-W-W
Key Word: ORGANIZATION

KEY POINTS		OBJECTIVES		
<ul style="list-style-type: none">• An organization exists to solve a problem for those who have the problem.• Leaders who all describe "WHAT their organization provides to WHO and WHY customers pay for it" in the same way increase the odds of better performance.• It takes time and effort to work out a good, better, or best WHAT-WHO-WHY; and it is doable and worth doing.		<ul style="list-style-type: none">• Describe any organization in terms of whose problem it solves using the W-W-W Template.• Practice giving and getting feedback on a W-W-W.• Understand that alignment across stakeholders is more important than correctness.• See how alignment comes from clarity reached jointly!		

Section	Readings	Min	Video Clips	Min
Content	MtL: Get Clear W-W-W	10	W-W-W Intro	3
	W-W-W Characteristics	5	W-W-W Explainer	5
Practice Case	Gap	5	Gap History	3
Your Case	W-W-W	15		
Σ Min = 46		35		11

[Launch Tutorial](#)

16. Skim the navigation panel to find and open Your Case

The screenshot shows the IntelliVen course interface. At the top left is the UMASS AMHERST logo. Below it is a breadcrumb trail: ... > 2.1 TUTORIAL > Launch Tutorial. There are two buttons: 'Edit in CourseArc' and 'Students' Progress & Performance'. The left sidebar contains a 'Navigation' menu with items: Introduction, W-W-W, Gap, Your Case, and Live Session. The 'Your Case' item is highlighted with a yellow oval. The main content area features the IntelliVen logo, the text 'Manage to Lead System' and 'Seven Truths to Help You Change the World', and the title '2.1 Get Clear - W-W-W Tutorial'. Below this is an 'Introduction' section with a prompt: 'Make a selection to view student answers.' followed by a paragraph: 'An organization exists to solve a problem for people who have the problem ... which begs the question: What problem does an organization solve for whom? Said another way:'. A bulleted list follows: '• WHAT does the organization provide?', '• WHO decides to purchase what the organization provides?', and '• WHY do customers choose to purchase what the organization provides from the organization (i.e., as opposed to from some other source)?'. There are expandable sections for 'Key Points' and 'Objectives'. At the bottom is a 'Preparation' section with a link: 'Read The Power of Clarity: Maximize Organization Performance with Stronger Strategic Alignment.' and the text: 'Work through the remaining sections of this module.'

17. Review Tips and end up wanting more help.

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2.1 TUTORIAL > Launch Tutorial

Edit in CourseArc Students' Progress & Performance

Skip to main content

Navigation

- Introduction
- W-W-W
- Gap
- Your Case
- Live Session

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Manage to Lead System
Seven Truths to Help You Change the World

2.1 Get Clear - W-W-W Tutorial

View Glossary

Your Case

Make a selection to view student answers. Select a Student

Enter and submit a W-W-W for YOUR CASE:

provides...
WHAT

Type Here

for...
WHO

Type Here

WHY

Type Here

Tips for Filling Out a W-W-W Template

- Use the **present tense**.
- Use **common, one-syllable words and simple phrases** that everyone understands.
- **Be specific** ... more specific than you are generally comfortable being.
- Think in terms of the **ideal customer**.
- **Say what you say only once** and in the section in which it belongs.
- **Stick to facts**, not beliefs. Everything in the W-W-W is subject to proof.

Voice-over:

The tips are interesting, and you think you understand them. It occurs to you that it would be a good to go through the W-W-W background, instruction, practice cases, and input prompts to be fully prepared to use the WHAT-WHO-WHY Framework. So, you decide to take about 40-minutes to go through the W-W-W tutorial introduction, readings, videos, input prompts, practice case, and live session slides before taking another run at filling out the W-W-W for your case.

18. Work through the full tutorial (readings, videos, practice cases, prompts) for rich background and understanding

UMASS AMHERST

... > 2.1 TUTORIAL > Launch Tutorial

Edit Course Arc Students' Progress & Performance

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Manage to Lead System
Seven Truths to Help You Change the World

2.1 Get Clear - W-W-W Tutorial

Introduction

Make a selection to view student answers.

An organization exists to solve a problem for people who have the problem ... which begs the question:
What problem does an organization solve for whom? Said another way:

- **WHAT** does the organization provide?
- **WHO** decides to purchase what the organization provides?
- **WHY** do customers choose to purchase what the organization provides from the organization (i.e., as opposed to from some other source)?

+ Key Points

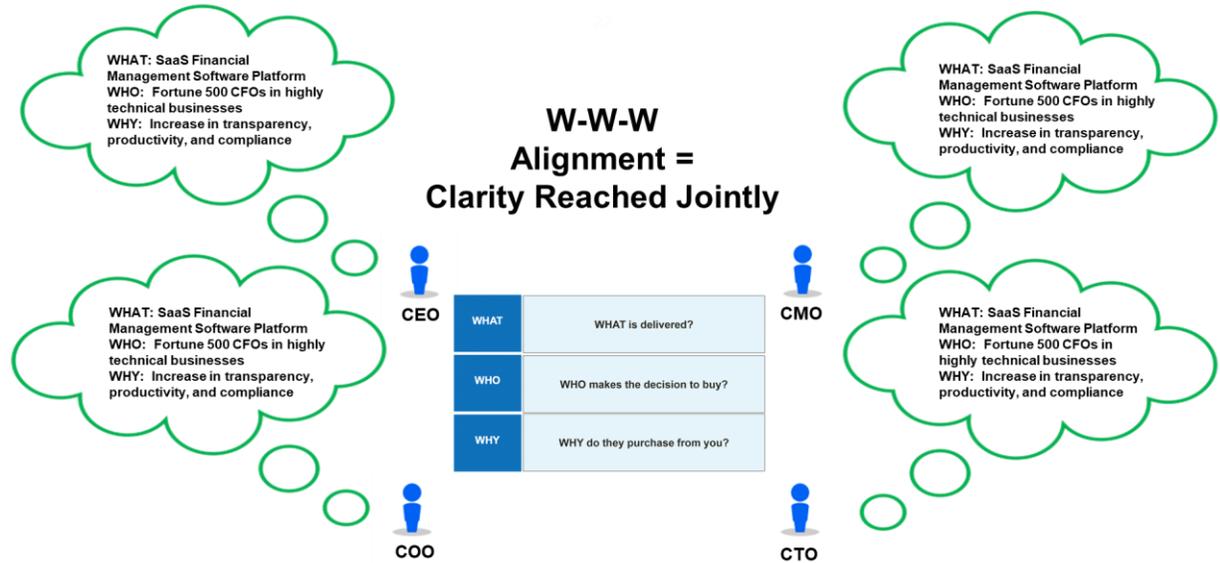
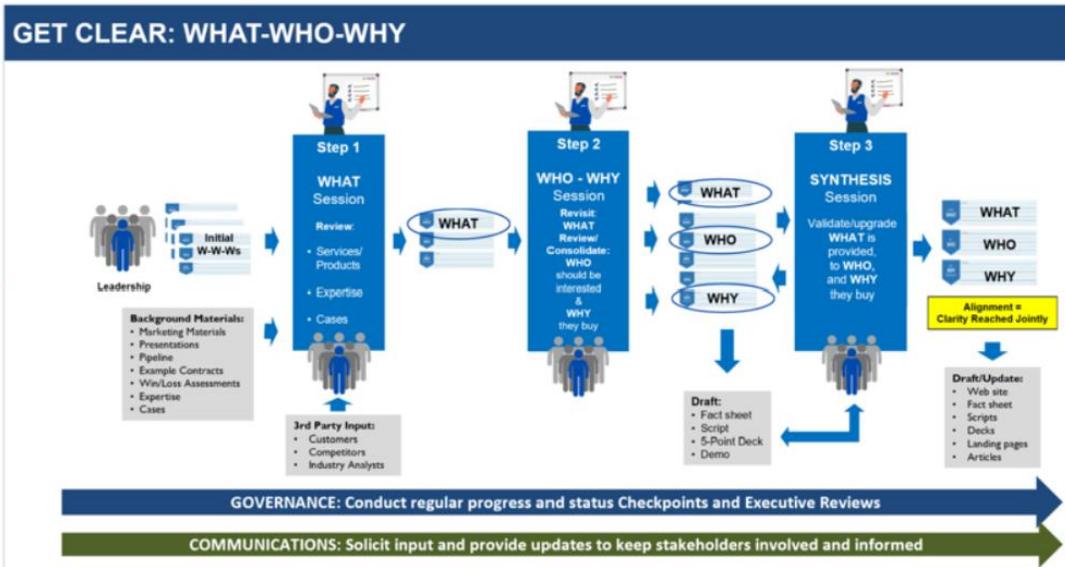
+ Objectives

Preparation

Read [The Power of Clarity: Maximize Organization Performance with Stronger Strategic Alignment](#).

Work through the remaining sections of this module.

19. Work with your team empowered to reach alignment



Voice-over:

Upon completing the W-W-W 2.2 TUTORIAL you feel empowered, confident, and ready to dig-in first on your own, then with your team, and then with outside reviewers to draft, hone, and develop a W-W-W you and your team all agree accurately describes your offering, who will buy it, and why they will buy it from you!

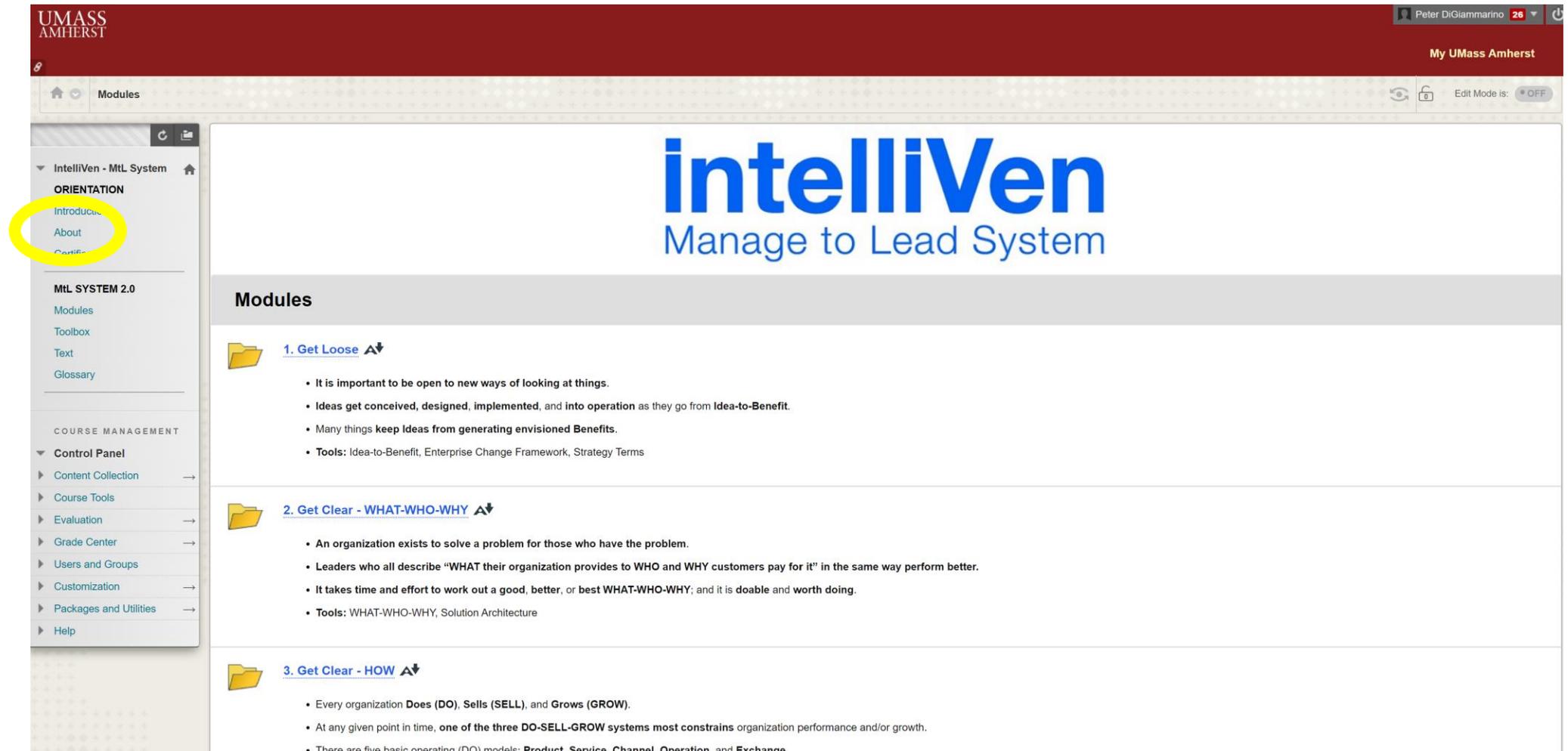
You realize that using MtL System tools has not only produced a valuable document that informs your plan, internal and external positioning and messaging, but helped you become closer to your teammates and empowered you (and them) with a tool that you will use forever!

20. Before returning to the MtL toolbox for tools to address approach to sales and strategic initiatives, you are curious about how 60+ tools get used together to build a plan.

The screenshot displays the IntelliVen 'TOOLBOX' interface. At the top, there is a navigation bar with links for HOME, SERVICES, TOOLBOX, RESOURCES, BOOK, EVENTS, ABOUT, CONTACT, and MTL LOGIN. Below the navigation bar, the page is titled 'TOOLBOX' and features a search bar. The main content area is a grid of tool cards, each representing a different strategic framework or process. Each card includes a title, a brief description, a star rating, and a thumbnail image. The tools are organized into categories, with the first row titled 'Manage to Lead Tools and Templates'. The tools shown include:

- WHAT-WHO-WHY**: A business solves a problem for a customer.
- Change Framework**: Context matters.
- Leader Support**: Get good at getting help.
- Idea-to-Benefit Cycle**: Turn ideas into reality.
- DO-SELL-GROW**: System of Systems.
- Heat Map**: Value Creation Initiatives.
- How to Drive Sales**: Turn what works into a revenue flywheel.
- Do & Review**: What, Why, Do What, Now What?
- Organization Stages**: Concept through Mature.
- Five Steps to a Sale**: Teach to sell.
- License Fees**: Perpetual vs. Subscription for Enterprise Value.
- Process v Content**: Both beat either.
- Road Map**: How to bring a work plan to life.
- Contract & Govern**: "If you think you can or you think you can't..."
- Client Pyramid**: Know what you have and what you want.
- Frames of Mind**: What change leaders need to know.
- Processes**: Process Mapping Elements.
- Private Equity Works**: How it works and who wins.
- Missed Lift**: Behavior Change Takes Conscious Effort.
- Sale or Financing**: Step-by-step guide.
- Run a Great Meeting**: Meetings make the difference.
- Initiatives**: Rack and Stack.
- Leader Overview**: Manifestation of Leadership.
- Effective v. Mature**: Most get it right in their second job out of BEM.
- Business Models**: Pick one and get it right.
- IN-ON**: Pizza Making v. Pizza-Making Business.
- Solution Architecture**: Offer to build a castle instead of lay bricks.
- Ways to Engage**: Step Up to Play at the Top.
- Six P's to Perform**: How to Prepare like a Pro.
- Financial Dashboard**: Past-Present-Future All in One View.
- Annual Assessments**: Keep appraisals apart from raises.
- Alliance Continuum**: You aren't how you play together.
- Key Performance Factors by Level Title**
- Definition of phrases with the word strategy**
- Organization Development Model**
- Bring Core Market with Agile Opportunity to Drive to New Markets for Growth Changes and New Offerings for Global Markets**
- Success Formula in a Crisis**
- Single Transformation Time Line**
- Who to call for help with Strategy and Operations Planning**
- Maturity Assessment Template**

21. Navigate to About



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Modules

IntelliVen - MTL System

ORIENTATION

Introducere

About

Certification

ML SYSTEM 2.0

Modules

Toolbox

Text

Glossary

COURSE MANAGEMENT

Control Panel

Content Collection

Course Tools

Evaluation

Grade Center

Users and Groups

Customization

Packages and Utilities

Help

intelliVen

Manage to Lead System

Modules

1. [Get Loose](#) A↓

- It is important to be open to new ways of looking at things.
- Ideas get conceived, designed, implemented, and into operation as they go from Idea-to-Benefit.
- Many things keep Ideas from generating envisioned Benefits.
- Tools: Idea-to-Benefit, Enterprise Change Framework, Strategy Terms

2. [Get Clear - WHAT-WHO-WHY](#) A↓

- An organization exists to solve a problem for those who have the problem.
- Leaders who all describe "WHAT their organization provides to WHO and WHY customers pay for it" in the same way perform better.
- It takes time and effort to work out a good, better, or best WHAT-WHO-WHY; and it is doable and worth doing.
- Tools: WHAT-WHO-WHY, Solution Architecture

3. [Get Clear - HOW](#) A↓

- Every organization Does (DO), Sells (SELL), and Grows (GROW).
- At any given point in time, one of the three DO-SELL-GROW systems most constrains organization performance and/or growth.
- There are five basic operating (DO) models: Product, Service, Channel, Operation, and Exchange.

22. Click About MtL System

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About

Edit in CourseArc Students' Progress & Performance

Skip to main content

Navigation

- MTL SYSTEM
- >IMMERSION PROGRAM
- >>Tutorials
- >>Final Submission
- >>Completion
- >>Your Cohort
- >WORKSTREAMS
- RESOURCES

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Manage to Lead System
Seven Truths to Help You Change the World

ORIENTATION - About

View Glossary

MTL SYSTEM

Make a selection to view student answers. Select a Student

Welcome to the IntelliVen Manage to Lead (MtL) System

MtL is a system of integrated tools, methods, and principles that executive teams use to pave and follow a reliable path to architect, build, govern, and change their organization for breakthrough improvements in performance and growth.

Each of ten MtL System Modules has three parts:

- + x.1 TUTORIAL
- + x.2 WORKSTREAM
- + x.3 MORE

23. Click through interactive wire-diagram of MtL modules.

UMASS AMHERST Peter DiGiammarino 26 My UMass Amherst

About

Click the hotspots in the diagram below for a high-level walkthrough of the MtL System Modules.

MtL System Modules

RAMP-UP
ORIENTATION LAUNCH
Enterprise Change Framework

GET CLEAR
W-W-W
HOW
WELL

ALIGN
PLAN CHANGE
Strategic Initiatives Change Networks

GO
DO & REVIEW
GROW
GET HELP
EXECUTIVE REVIEW
Initiative Management Setup

PERIODIC EXECUTIVE REVIEWS
Guide and Govern

RAMP-UP

The first module is for the leader and their team to align on where things sit and on their goals given their organization's mandate, mission, vision, and culture.

This module's output is an **Enterprise Change Framework** that tells the story of where things are now, why change is essential, what things will look like next, and what will be done to achieve the targeted next state.

This is also when team members ensure that they are able to enter and navigate the MtL System.

24. Consider how best to access and apply MtL System tools, methods, and principles.

Four Easy Ways To Get Started With MtL



Free Access to All MtL Tools

Register to access all 50+ MtL tools and templates at no cost or obligation

[GO TO TOOLBOX](#)



MtL Immersion Academy

Join intensive, hands-on training in the MtL System and tools with a cohort of other leaders and their teams

[LEARN MORE](#)



MtL Accelerator

Custom training and application of MtL to your specific organization and your specific objectives and challenges

[LEARN MORE](#)



MtL Workstream Platform

Ten integrated online workstreams that deploy MtL tools and templates in the most common step-by-step order, including tutorials and supplemental material.

[LEARN MORE](#)

Voice-over:

Keep using MtL tools and refer to associated workstreams and tutorials on an ad hoc basis, or you and your team could:

- Go through an Immersion Program where **Your Case is the Course** to fully understand, internalize, and apply MtL tools, methods, and principles.
- Retain MtL-Certified Consultants to work side-by-side with you and your team to access and apply MtL tools, methods, and principles while accelerating in-flight initiatives.

Reflections

Comments

Questions

What questions do you have?

Where do you see alignment in what MtL provides and what you seek?

What paths forward might we envision, e.g.:

Use W-W-W, CF, and LSS templates (and other MtL tools) with your team

Register your leadership team to use MtL System

Enroll your leadership team(s) in an MtL Immersion Program

License a branded instance of MtL for internal use

Retain MtL-Certified Consultants to assist with inflight initiatives

Offer MtL training, content, reviews, and ongoing support services to clients

Thank you.

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About PeterD

- Joined a startup (AMS) out of B-school. Helped grow to \$1B and 10,000 people over 20 years.
- Used what I learned/figured-out to then run/help-run:
 - Two public companies:
 - Hyperion (now Oracle)
 - BTG (now GDIT)
 - Four private ventures:
 - Aquilent for Warwick Capital (now Booz Allen)
 - Touchstone for private founders (now GDIT)
 - Compusearch for Carlyle Group (now UnisonGlobal)
 - Command Information for VC consortium (now Salient)
- CEO Groups
 - Always belonged to a CEO group; including two Vistage groups.
 - Worked with Vistage chairs to provide content and perspective; also, for Renaissance Executive Forum and look-alikes.
- Founded and run IntelliVen to help leaders and their organizations use what I have learned to reach their potential to perform and grow.

AKA: shorten the time it takes founders, owners, and operators to achieve value-creation and impact goals.

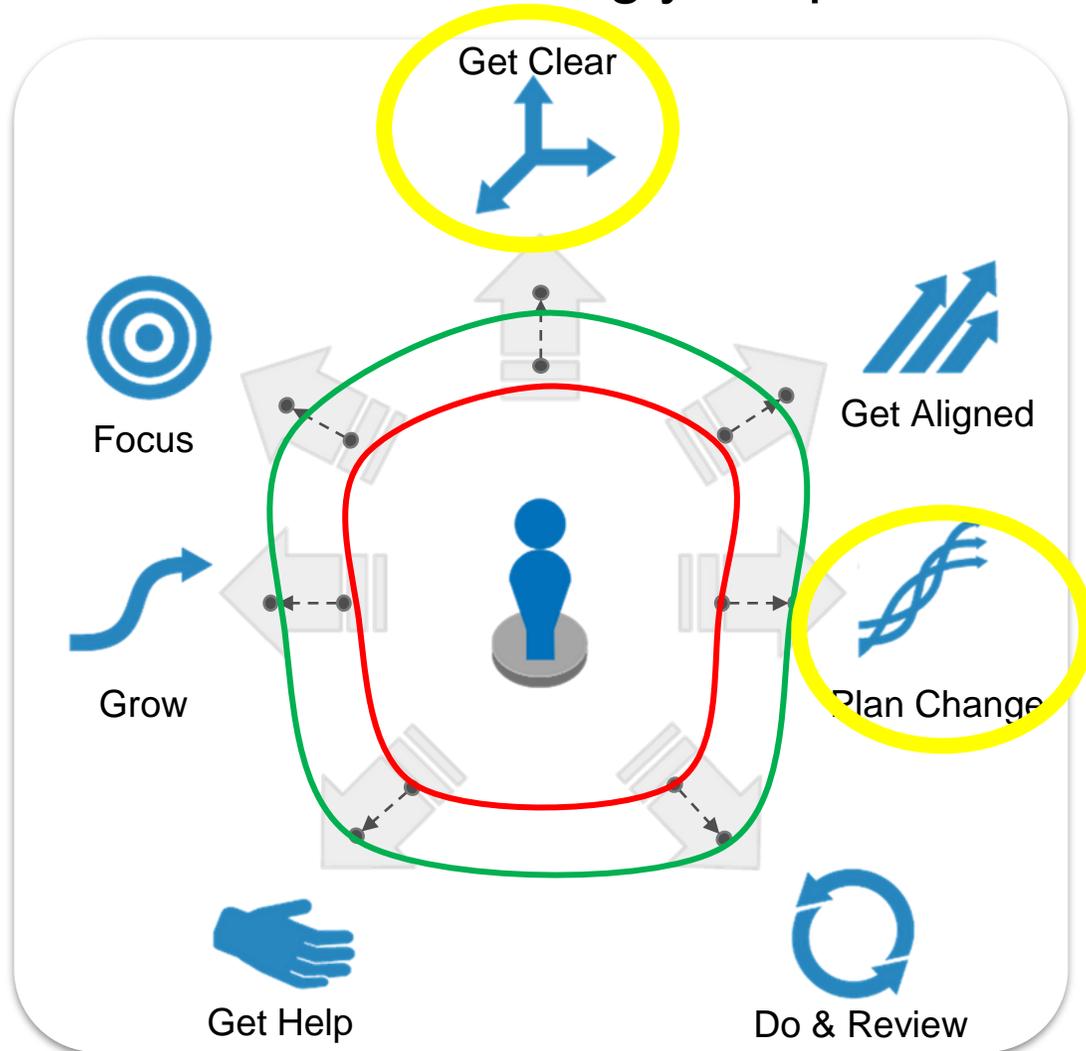


I learned and grew a great deal as a CEO Group member

- Great way to:
 - Learn new things with / in front of peers who challenge each others', and presenters', thinking.
 - Practice being **vulnerable** and **open to input**.
- Vistage speakers who most impacted me:
 - [Edgar Papke](#): Culture
 - It can be measured
 - It can be changed in a planned way
 - Kraig Kramer: [CEO Tools](#)
 - His are for finance and accounting (i.e., numbers: how to track the business)
 - Mine are for operations (i.e., process: how to architect, build, govern, and change the business)

MtL System Enables Actions Consistent with Seven Truths*

...that are disarmingly simple to understand...and **NOT** at all easy to implement!



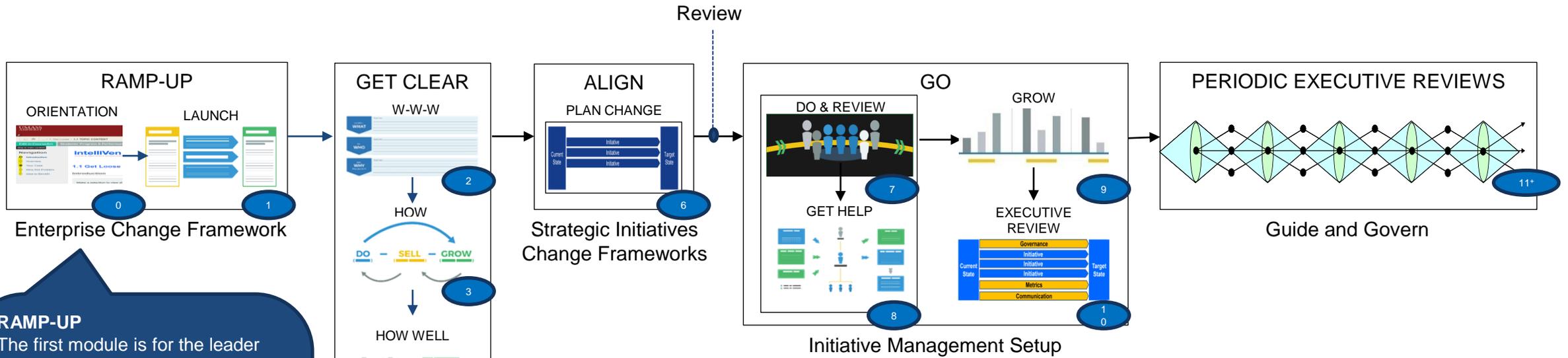
Two Truths are the focus of today's MtL Workshop:

- The purpose of a business is to solve a problem for a customer
- Context matters

*See: [IntelliVen Manage to Lead: Seven Truths to Help You Change the World](#)

By: Peter F. DiGiammarino

MtL System has Ten Modules

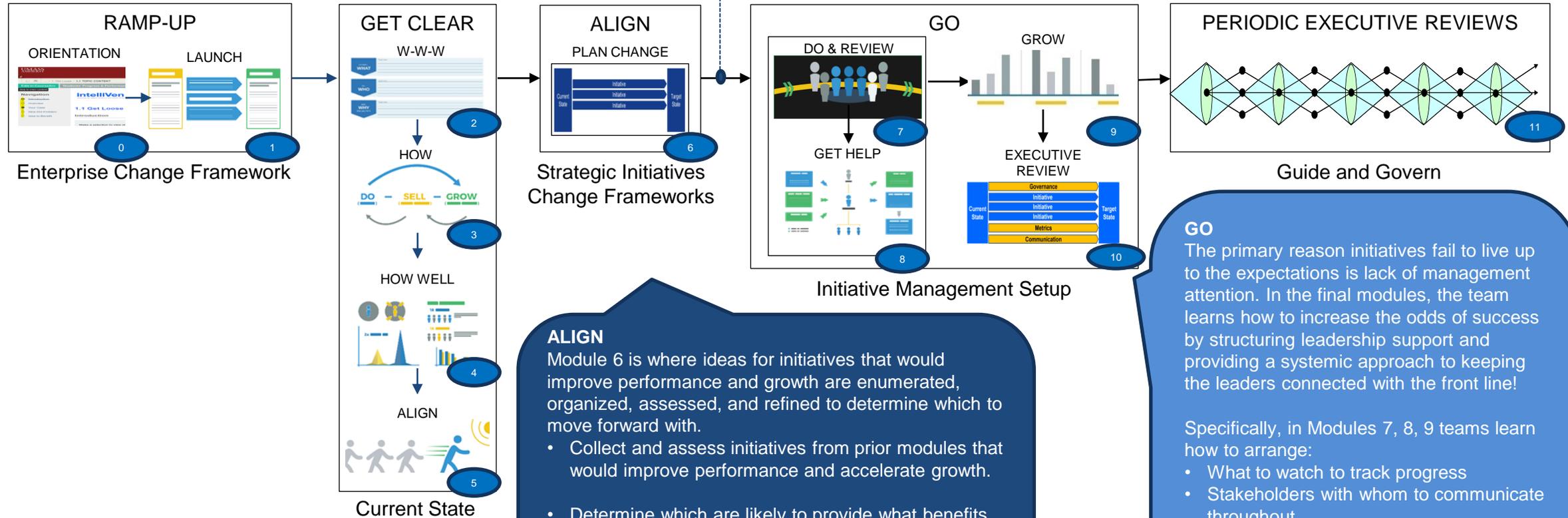


RAMP-UP
 The first module is for the leader and their team to align on where things sit and on their goals given their group's mandate, mission, vision, and culture. This module's output is an **Enterprise Change Framework** that tells the story of where things are now, why change is essential, what things will look like next, and what will be done to achieve the targeted next state. This is also when team members get comfortable navigating the MtL System.

GET CLEAR
 A group is **READY** for **CHANGE** when its top team is 100% aligned on:

- What their group provides, to whom, and why customers purchase from them (Module 2)
- How the group does what it does, creates demand for what it does, and **GROWs** its **DO** and **SELL** capacity (Module 3)
- Its operating model and how well they perform vis a vis past, plan, and peer performance (Module 4)
- Who the team counts on to do what as well and who meets with who about what and when (Module 5)

MtL System has Ten Modules



MIDPOINT REVIEW

At the Immersion Program halfway point, we review with each team leader about how things are going and to refine expectations and adjust as appropriate given the team's progress and challenges.

ALIGN

Module 6 is where ideas for initiatives that would improve performance and growth are enumerated, organized, assessed, and refined to determine which to move forward with.

- Collect and assess initiatives from prior modules that would improve performance and accelerate growth.
- Determine which are likely to provide what benefits with what degree of difficulty.
- Assign who will be responsible for creating the Initiative Change Framework and oversee efforts to achieve targeted goals.

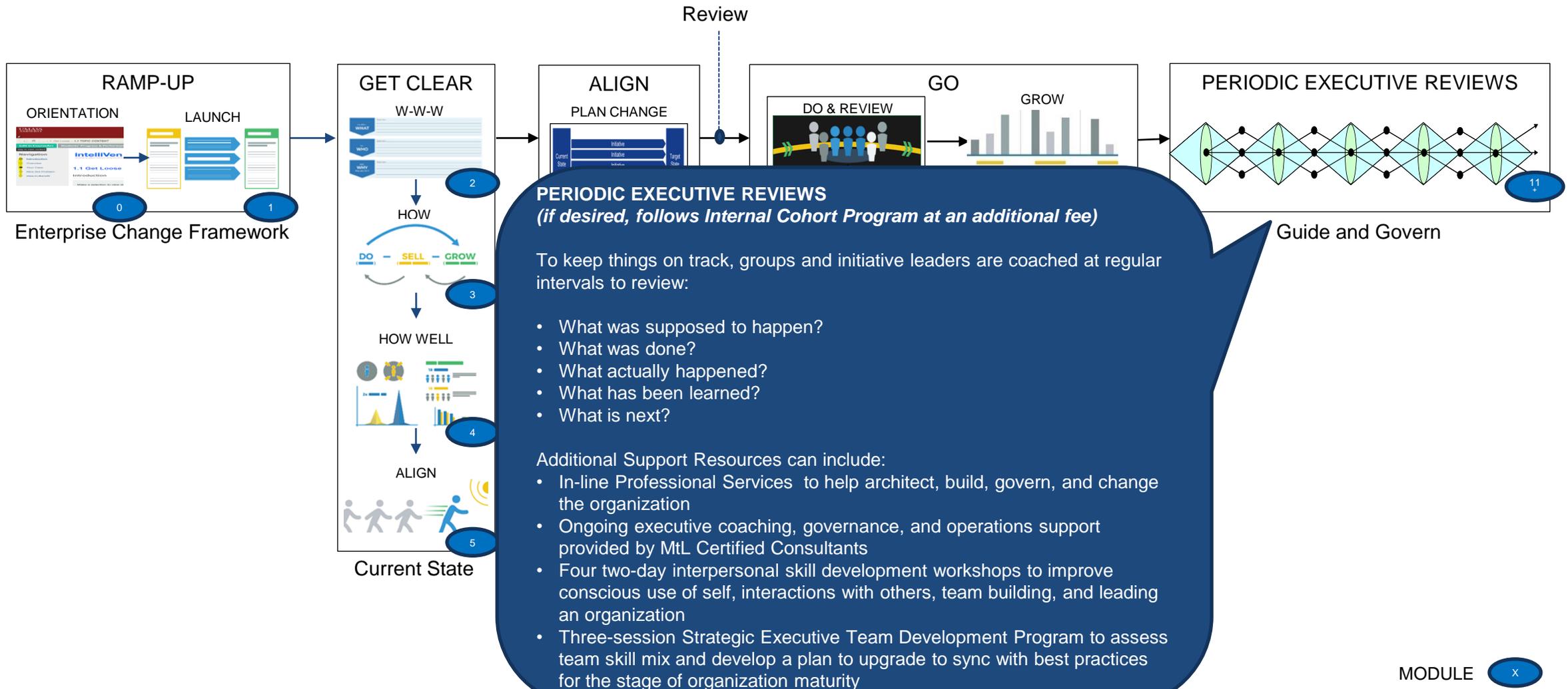
GO

The primary reason initiatives fail to live up to the expectations is lack of management attention. In the final modules, the team learns how to increase the odds of success by structuring leadership support and providing a systemic approach to keeping the leaders connected with the front line!

Specifically, in Modules 7, 8, 9 teams learn how to arrange:

- What to watch to track progress
- Stakeholders with whom to communicate throughout
- Governance to provide oversight and guidance
- Leadership support with expert advisers, peers, learning community, and access to resources

MtL System has Ten Modules



MtL System Tools, Workstreams, and Tutorials Support Planning and Implementation



An organization is *defined* in four dimensions.

MANDATE Mission—Vision—Values	
Dimension	Description
WHAT-WHO-WHY 	<ul style="list-style-type: none"> • WHAT is provided to • WHO and • WHY they buy
HOW 	<p>HOW does the organization:</p> <ul style="list-style-type: none"> • DO what it does: product, service, channel, operation, or exchange? • SELL, or create demand for what it does? • GROW to increase capacity to DO and SELL?
HOW WELL 	<ul style="list-style-type: none"> • What is watched to know HOW WELL things are going? • Core competencies • How financials work
RESPONSIBILITIES 	<ul style="list-style-type: none"> • Who the team counts on for what? • Who meets with who, when, about what?

Assess each to know where things are now and to determine what needs to change and toward what ends.

Truth. No leader succeeds alone.

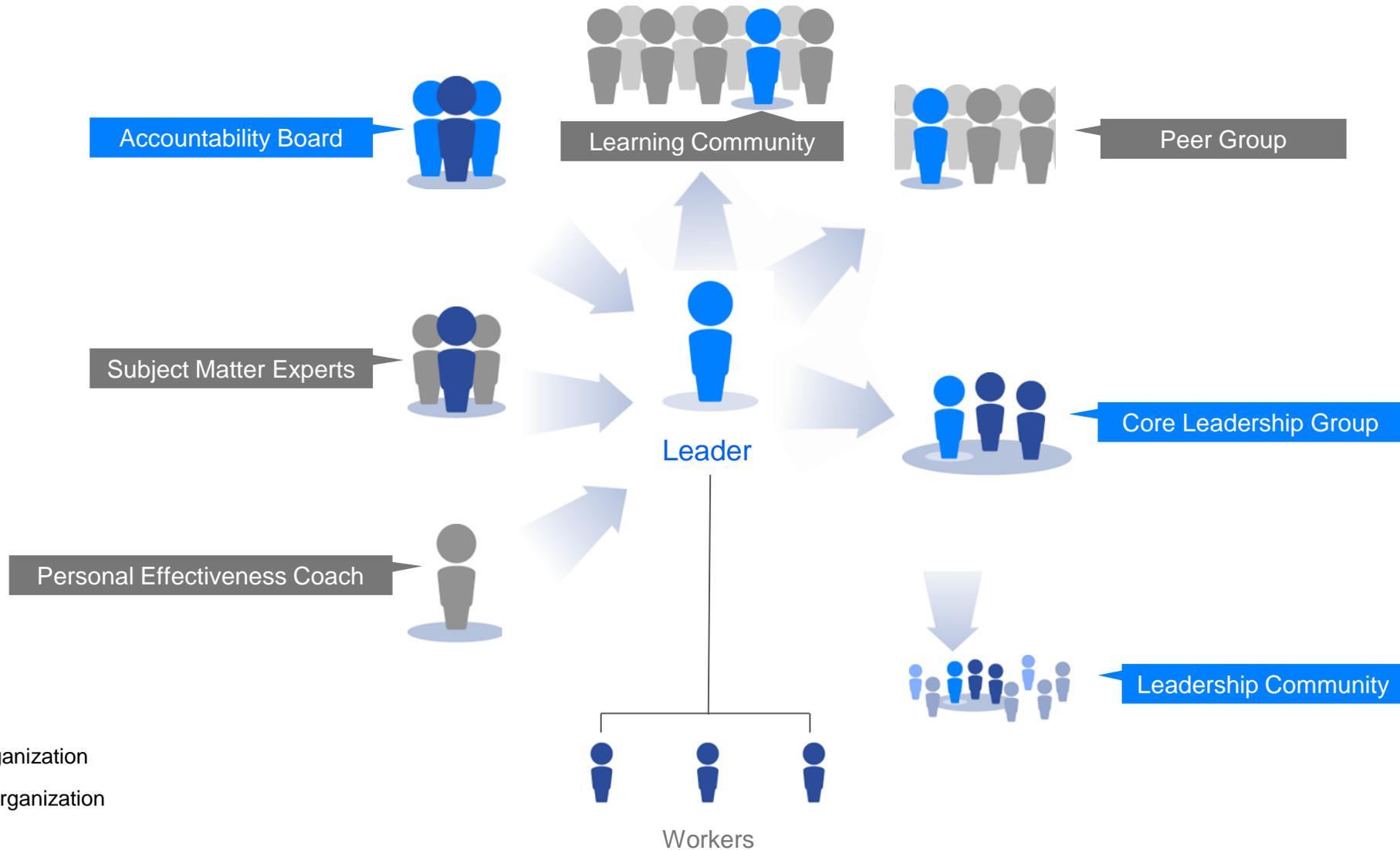
Action.

Get Help

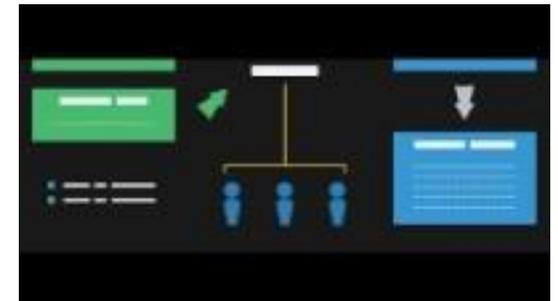
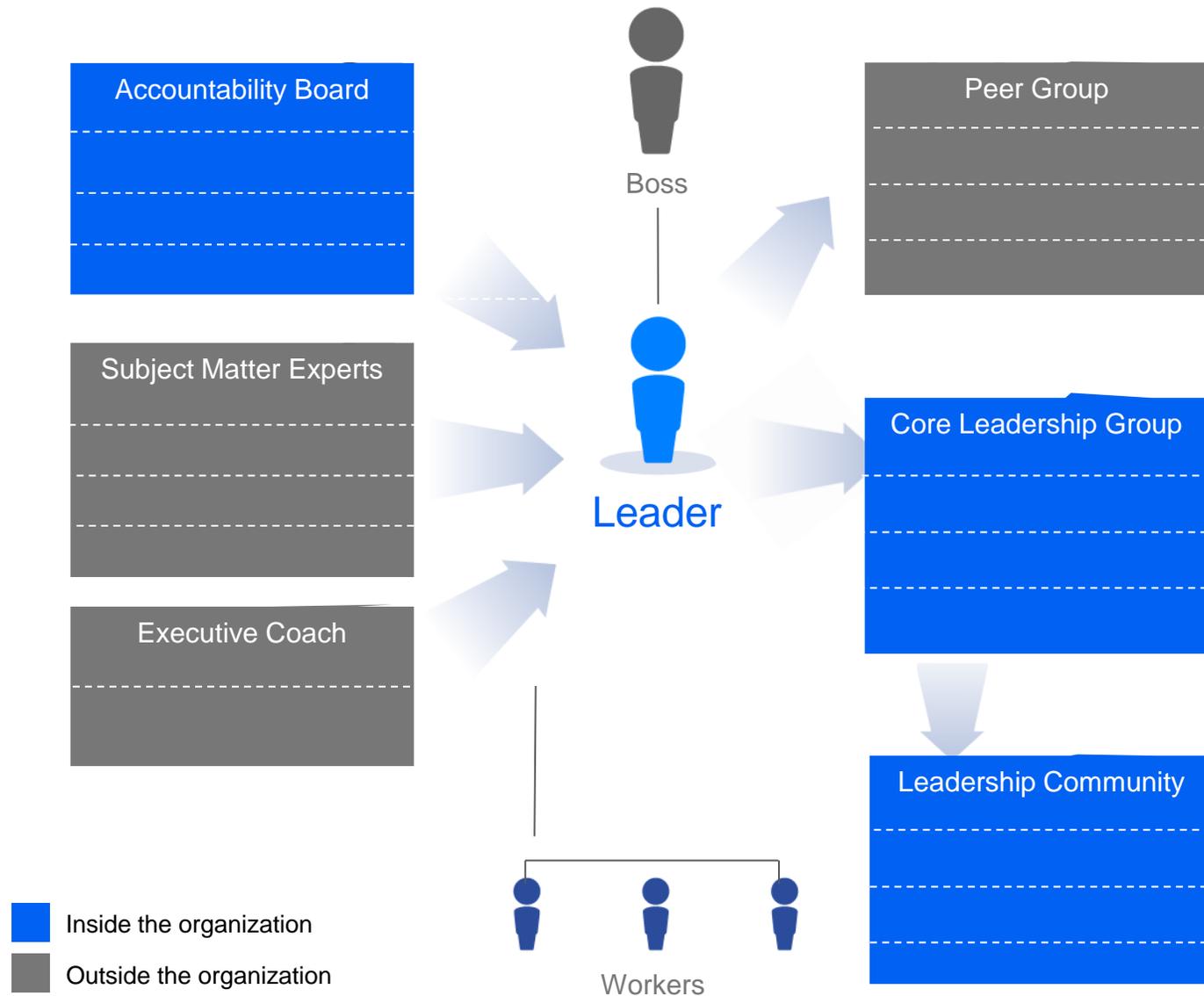
Build a board. Retain experts. Get a coach.



SUPPORT STRUCTURE FOR LEADER SUCCESS



Leadership Support Structure Template



[Get Help Tutorial](#)

MtL SUPPORTS A THREE-PHASED APPROACH



Truth. Context matters.

Action.

Plan Change

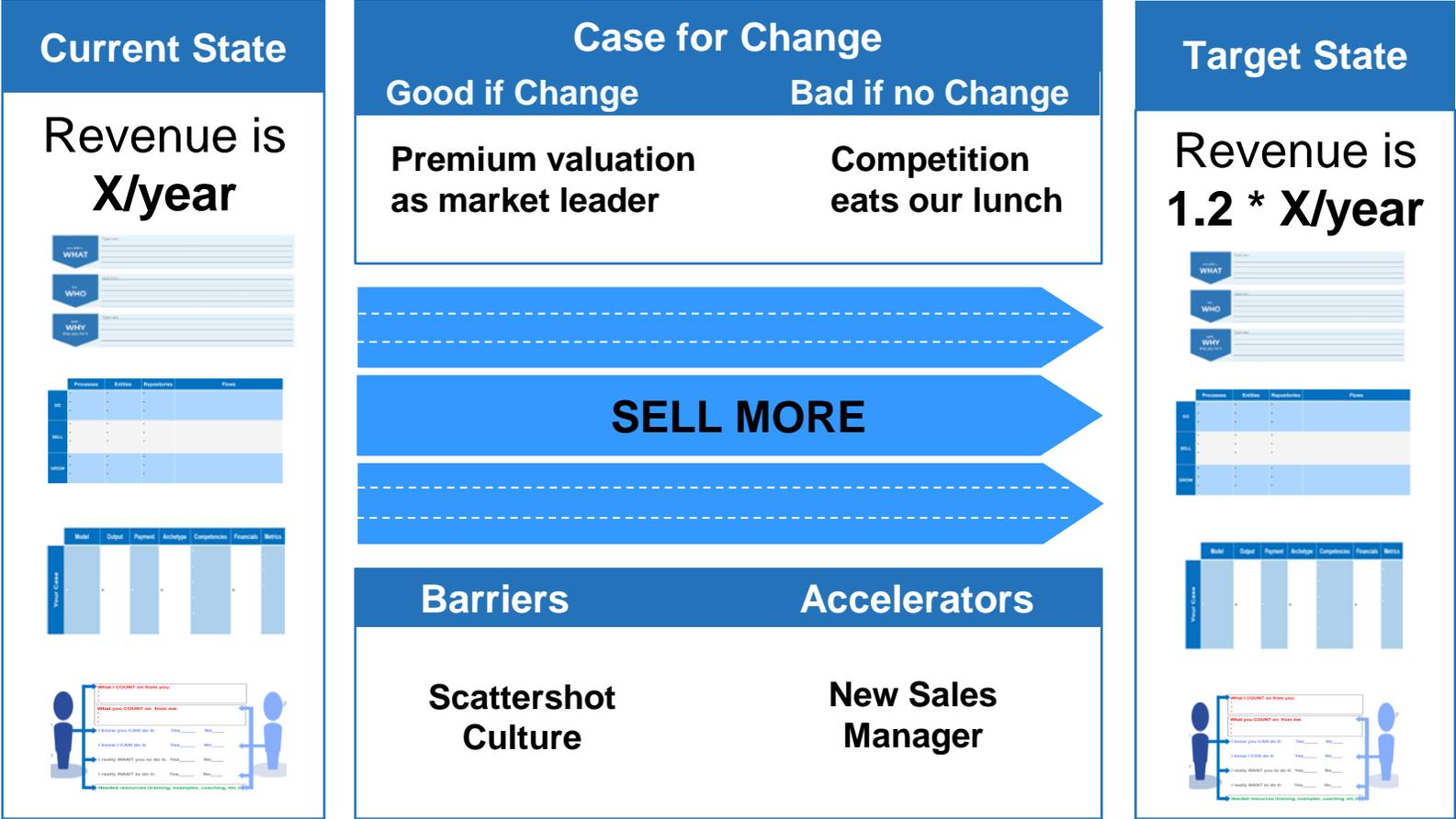
Decide what must
change, why, and how.



Name an initiative you would recommend in this case.

Enterprise Change Framework

Note: "Sell More" is a goal, *not* an initiative!



Goal: Sell More

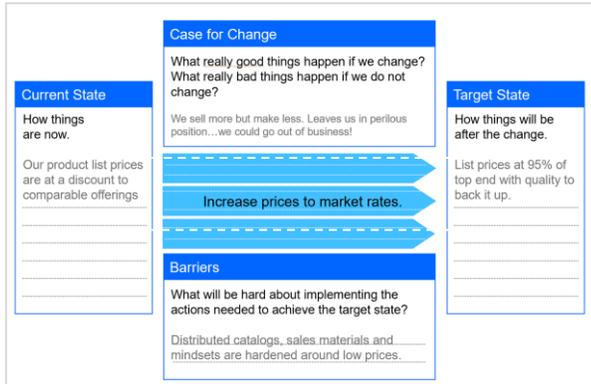
Initiative: Launch a campaign targeting sales to tech companies

Plan:

- List characteristics of ideal targets
- List all large tech companies
- Determine which three have best potential based on characteristics
- Map key players and their roles
- Develop a call plan
- Develop messages
- Determine who we want to speak with about what
- Determine who we know that knows who we want to call
- ...

SIX STEPS TO LAUNCH SUCCESSFUL INITIATIVES

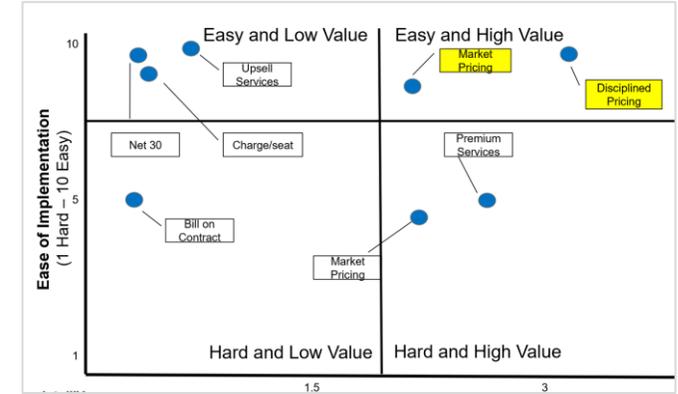
1. ENTERPRISE Change Framework



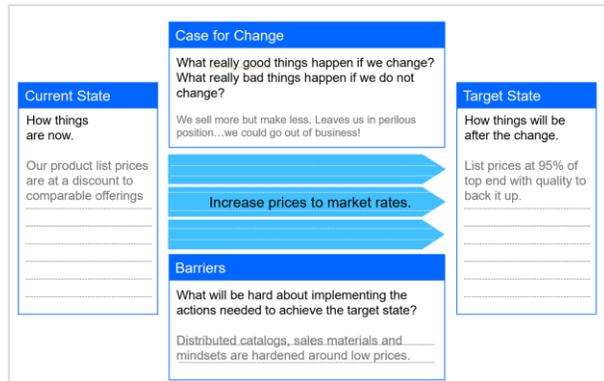
2. List All Possible Initiatives

Revenue Initiatives	Ease of Implementation (1 Hard -10 Easy)	Expected Value (\$000)	Executive Sponsor	Business Owner	Notes
Increase prices to market	9	2,000	Fahmi	TBD	4000 * 5%2
Offer premium services	4	1,920	Allie	TBD	80,000/C * \$28 * 12
Disciplined pricing	10	3,629	Bill	TBD	\$1.4M 14% uplift by 1800/mo.
Provide premium services to top customers	5	2,496	Suniti	TBD	100,000 * \$28 * 12 * 5%
Upsell Services	8	1,008	Ahmed	TBD	5 people per mo. On avg for 12/m
Charge per seat	9	480	Matt	TBD	12 * 40
Tie maintenance to then-current base fee	10	800	Matt	TBD	Incremental 4%
Bill upon contract	5	200	Marie	TBD	\$500 * 5/21.6
Reduce terms to net 30	9	240	Dan	TBD	7.5% * 3500
Total			\$12,773		

3. Prioritize Initiatives via Heat Map



4. INITIATIVE Change Framework



5. Initiative-to-Action

IntelliVen Manage to Lead Initiative-to-Action Template

Initiative ID: _____ Team Leader: _____ Executive Sponsor: _____ Date: _____

Team Members: _____

Opportunity: _____

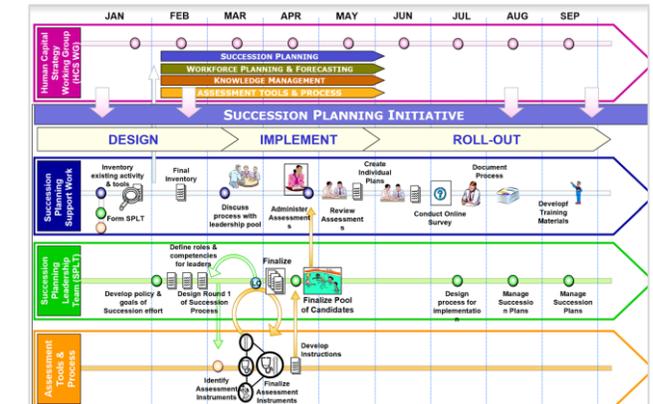
Approach: _____

Timetable:

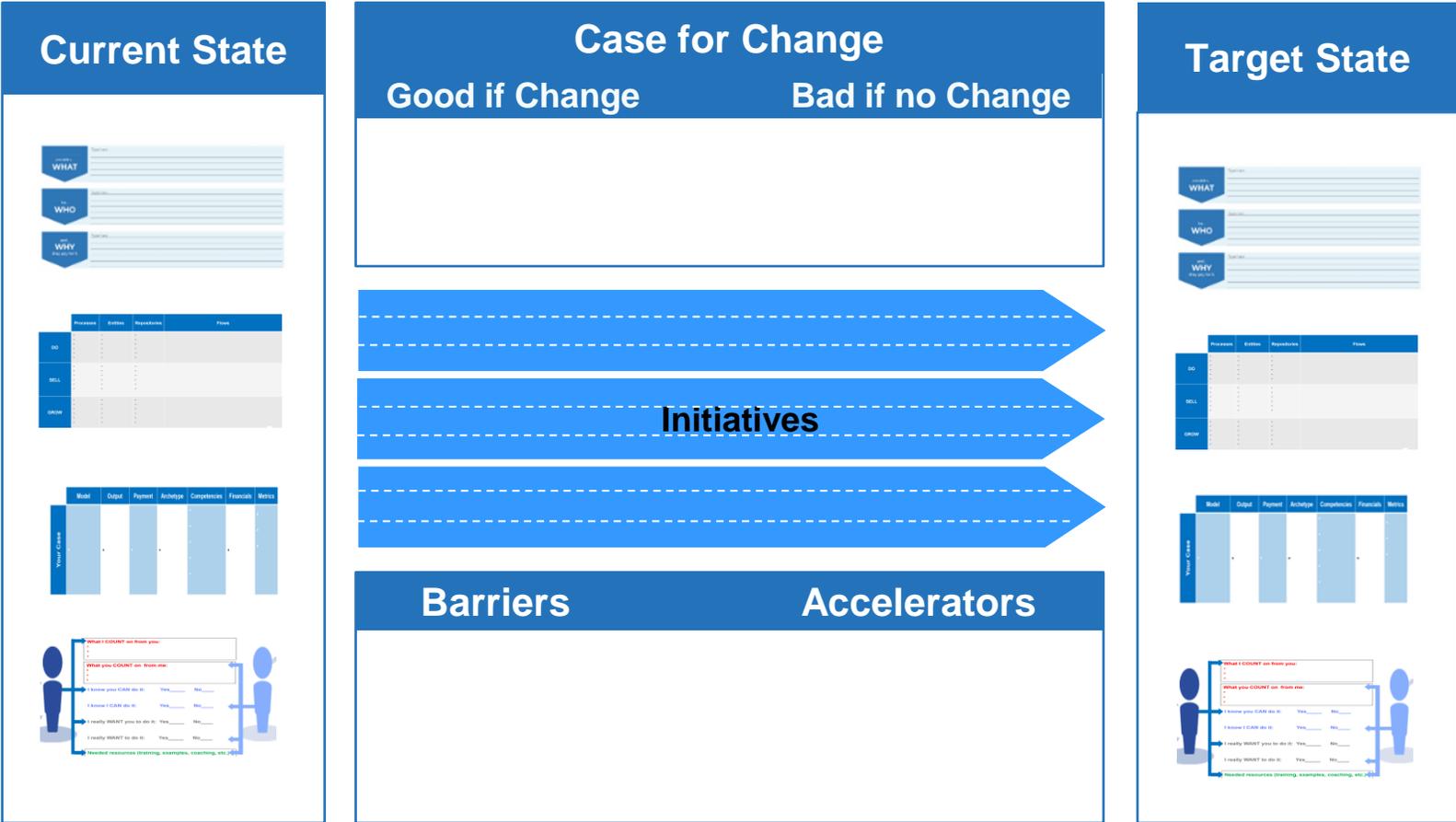
Milestone	Date

What you will watch to know how things are going and when the initiative is completed:
Key Considerations: _____

6. Road Map



Use the Enterprise Change Framework Template to Tell Your Change Story



Your Case:



OBJECTIVES: Draft an Enterprise Change Framework for comment.

INSTRUCTIONS:

5': Fill-in the CF template for your organization.

40': Talk through CF in turn with the group

- Share what comes to mind (questions, comments, suggestions, etc.) in CHAT
- Be specific

5': Reflect on the experience.

Change Framework

CURRENT STATE

How things are now:

CASE FOR CHANGE

What good things happen if we change?

What bad things happen if we do not?

STRATEGIC INITIATIVES

.....>

What must be done to achieve the Target State

.....>

BARRIERS

What inhibits the change?

What accelerates the change?

TARGET STATE

How things will be after the change:

Tips for filling out a Change Framework

- Use **present tense** in Current/Target state entries.
- Begin Strategic Initiatives with **verbs**.
- Every Target State entry has:
 - A corresponding entry in Current State.
 - Something in the Case for Change that motivates the Target State.
 - A way to measure where it is now and where it is to next be.
- Think expansively about Target State. Adopt a planning horizon far enough into the future so as to not be constrained by the present (e.g., 3 years).
- Stay agile; as goals and circumstances change, so will the Change Framework.
- Tweak other entries as you fill out each box of the framework.
- Use the process of preparing the framework with a team more to **flesh-out thinking vs. a way to *decide* what to do.**
- The completed framework should tell a coherent story, where the level of detail for Current/Target States is consistent with Initiatives.
- Prepare a separate **Change Framework for the organization overall** and **one for each Strategic Initiative**



[Do & Review Tutorial](#)