



The Manage to Lead Executive Alignment System for Operations and Governance

Instructors Manual



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Overview

This document contains background material that MtL Instructors, Principal Consultants and Coaches (PCs) will find useful in orienting themselves to the program as a whole and to each of its ten modules. The following sections provide essential readings and guidance for navigating the content and engaging with the program effectively.

Summary:

- **Section I:** Foundational material and context for the MtL program as a whole. This will give you a solid base to grasp more detailed concepts later.
- **Section II:** Instructions and expectations for all live sessions.
- **Section III:** Background and guidance for each module to absorb ahead of each live session.

Note:

- If you encounter any ambiguities or have questions about the material, don't hesitate to reach out to the instructors. Be as specific as possible about what you need help with.
- Keep in mind that this guide and its content are continually evolving. If you have suggestions for improvement, please document them and share them with the instructors. While changes are unlikely to be made during the current program, all feedback will be carefully considered to enhance future iterations.
- Your role is to align with the program's objectives and help bring them to life. Aim to understand what we're working to achieve and support that vision.
- During live sessions, participate fully, just like everyone else, you're learning too! However, encourage participants to take the lead before coaches or PCs step in.
- **Please avoid dominating the conversation or introducing models or frameworks outside the scope of the program. We're already working with a rich set of concepts, and our focus is on mastering what's in the curriculum.**
- Thank you for your commitment and help to make this experience as positive and impactful as possible for everyone.

I. Background and Reference Reading

The following provide background on key points regarding how MtL is set up, how it works, and what it seeks to accomplish.

Principal Consultant Background

- [Benefits to PCs Taking a Team Through MtL](#)
- [PC Role Description](#)
- [Note on Group Dynamics for MtL PCs](#)
- [MtL Program Roles and Expectations](#)
- [Guide for Initial PC Meeting With Team Leader](#)

Tips and Aids

- [Training Program Content](#)
- [Breakout Facilitation Tips](#)
- [Instructions for using IntelliVen Operations Advisor \(IVOA\)](#)
- [Video Instructions for IVOA](#)
- [IVOA Sandbox Users Guide](#)
- [Outside Executives Background](#)
- [Live Executive Session Briefing Guidelines](#)
- [Final Submission Templates](#)
- [Final Submission Templates Video Walkthrough](#)
- [Final Submission Score Sheet](#)
- [Glossary](#)

Miscellaneous

- [Open items to address with Maven](#)
- [Participant Broadcasts ahead of each module](#)
- [Manage to Lead Summary Podcast](#)
- [Course Play List](#)
- [From Tool to Teammate: Six Practices that Make AI Work](#)

II. Guidance For All Modules

Review and digest the guidance in this section to be applied for every module.

- **Pre-Live-Session Preparation:**

Review the MtL content (readings, videos, practice cases, input prompts) on Maven for the associated module.

Review Participant Input:

- Access the **Submissions Tab** on Maven to review participant input.
- Identify and bring to the attention of your team leader any issues that should be addressed or noteworthy contributions from team members.

Review the “Before Module X Live Session” guidance in Section III of this document, below, to familiarize yourself with the necessary actions ahead of and during the upcoming live session. Let instructors know if you would like to see live session slides or a recording from a previous cohort ahead of a live session.

- At the bottom of the syllabus on Maven, in the **Bonus** box, there is a section called "Follow-on Materials by Module." Please review this content as part of your module preparation to expand your knowledge and bring relevant items to your team's leader.

- **In-session Breakout Instructions:**

- Use the **SLIDES** button on the live session event entry on Maven to access Breakout Instructions prior to or during a live session. Download, or make a copy of, slides to markup during the breakout as needed,
- The Maven event entry **SLIDES** link will be updated with a link to the live session slides shortly after the session ends.

- **Post-Live Session Breakout:**

- Develop a plan to discuss submitted input during the post-live session breakout. Be sure to appreciate participants' efforts, help the team consolidate key points from the live session, and advance their understanding and progress applying MtL artifacts to their case.
- Help the team develop a plan to implement what they have learned between live sessions. Work may begin in this breakout but surely will not be completed.
- Breakout instructions for each session include suggested topics to discuss with the team in addition to the following standard prompts:

- What sticks with you from today's session?
- What will you do with what you learned?
- What questions do you have?
- What would you change?

III. Module-by-Module Guidance

Review the guidance below module-by-module as the program progresses.

Module 0.0 Kickoff and Orientation Meeting to Launch and Align (ahead of first live session)

- Hold a one-on-one with the leader, then meet with the full team before Module 1 Live Session.
- In both meetings, learn each person's background, role, goals, and concerns for themselves, the organization, and one another.
- Get a sense for what the organization does and seeks to achieve, how it is going, and where each team member is on their growth path.
- Set a cadence for follow-up touch-points with the leader and the team between live sessions.
- Agree on preferred communication channels (text, email, phone, Slack, etc.).
- Confirm every participant has:
 - Accepted all calendar invitations,
 - Logged in to Maven and completed their profile,
 - Started the Getting Started and Ramp Up modules and is on track to finish them before the first live session.
 - Been made aware of the Additional Resources (IVOA, Sandbox, Tools, Text, Follow-on materials, etc.) explained in the Getting Started module.
- Additional suggestions in [Guide for Initial PC Meeting With Team Leader](#)

Module 1.0 Ramp Up

Please be sure to do the following ahead of our first PC prep session:

1. **Enter our cohort on Maven** and work through Get Started and Ramp Up modules. Note, please access MtL via the MtL LoginIn option on the intelliven.com top menu to have easy access to all the other MtL support artifacts (Sandbox, IVOA, Toolbox, Videos, Posts, and Insights).
2. **Check out the** module 1 live session breakout instructions on Maven Slides for the first live session event.
3. **Review the PC guidance Sections I, II, and III Module 1** in this document.

In module 1 we aim to:

- Help participants get acquainted with their fellow cohort members and principal consultants.
- Introduce the use and structure of breakout sessions.

- Experience how live sessions will be conducted throughout the program.
- Emphasize the importance of aligning on basic concepts, such as the meaning of words and the lifecycle of ideas from inception to implementation.
- Highlight the need to think deliberately about aspects that are often approached unconsciously, such as what they seek to accomplish, working on initiatives and setting strategy.
- Distinguish between a goal (the outcome to achieve), an initiative (the time-bound change to how we work to achieve it), and the tasks (a specific action that advances the initiative).
- Begin using MtL tools to define their organization's Mandate, what it seeks to accomplish by when, and assess its current state and progress using the Enterprise Change Framework.

Note:

On Maven we have two input prompts not covered in the live session but useful for leader–team discussions:

- What animal or image describes your organization now?
- What animal or image describes your organization next?

Encourage your team's leader to review these responses and decide if, how, and when to explore them. They often spark valuable conversation about the group as a whole and individual members.

In the live session we also mention, but do not work on, personal mandates. These, too, can be taken up later with the team leader and team members.

Pre-session Preparation:

1.2: Understanding the Idea-to-Benefit Cycle

- Participants often have diverse views on their position along the Idea-to-Benefit cycle from their customers' perspectives. During the live session, we explore their self-perceptions in the eyes of their customers and also their views on their progress with internal initiatives.
- For both internal and customer-related work, a key takeaway is that ideas advance to implementation through a series of steps. MtL provides tools and methods to improve the effectiveness of these steps and help ensure that ideas achieve their intended benefits.

1.3: Aligning the Meaning of Key Words

- The intentional disparity in responses during the participant matching exercise highlights that people often interpret the same words differently, and that different

words can sometimes convey similar meanings.

- The ultimate goal is for leaders to learn to collaborate with teammates to surface and reconcile differing perspectives, reinforcing that in MTL clarity and alignment come from facilitated dialogue and agreement on one shared answer across all aspects of the business.

1.4: YOUR CASE

- **Breakouts**
 - In the live session the second breakout is for teams to work on their Organization's Mandate. Guide team members to access intelliven.com > [SANDBOX](#) to enter their Mandate, generate assessments and suggestions, review similarities and differences, and to suggest a consolidated version.
 - At the end of the live session, teams will again enter their Sandbox to begin work on their Enterprise Change Framework during a third breakout.
- **Participant Frustration and Expectations**
 - Participants may express frustration about not being able to definitively assert a consolidated Mandate or Enterprise Change Framework (ECF).
 - This is expected and desirable, as the need for these will become clear and evolve throughout the program.
 - By Module 6, if participants still haven't finalized these elements, we will ask them to assert a version to guide them through the remaining modules.
- **Final Submission Templates**
 - PCs may introduce the Final Submission Templates when it makes sense for the leader. They are linked for the first time Maven: [Get Started > Meet with PC > 2nd bullet.](#)
 - Encourage teams to focus first on the **Sandbox** for exploration and alignment. As clarity strengthens through collaboration, guide them to copy and store a version of the Final Submission Templates deck to house their most refined content.

Module 2.0 Get Clear WHAT-WHO-WHY

In this module, participants discover that many organizations are not always what they appear to be. When working with a team to build or enhance an organization, it is crucial that all members share a precise understanding of the organization's definition. Aligning on this definition ensures that everyone is on the same page and leveraging their individual strengths towards a common goal.

First Breakout: Refine based on live session content, and then Consolidate, individual WHAT-WHO-WHYS. (See breakout instructions in Maven module 2 live session event entry.)

Second Breakout: Run W-W-W by another team. This is practice for both

- Presenters
 - How does your W-W-W sound when you share it with someone outside your organization?
 - Get comfortable sharing what you seek to improve.
- Listeners
 - Seek to understand and develop a point of view.
 - Provide feedback in the moment.

Key Point: The team may be confused by differences in their views on the Ws and uncertain about which direction to choose. Remind them that it's okay not to have all the answers at this stage. As they move towards Module 5, clarity will emerge, and they will soon be able to finalize a consolidated W-W-W to use through Modules 6-10 even if it ends up not being what they run with post-cohort.

Module 2 Preparation

Once you have worked through the input prompts the first time in Module 2.2, review the [ideal responses](#) for those questions. You can use them to help focus your own understanding and support the leader and members of the team you are supporting to clarify.

Potential Dilemma: Which comes first, the Mandate or the W-W-W?

At this time, or perhaps in the next week or so, the participants begin to see that the Mandate and the W-W-W are mutually supportive and interlinked. Clarifying what you must accomplish, can lead to changes in the W-W-W and vice versa. Sometimes leaders and teams will ask: which one should we work on first? We recommend you read [this post](#) now, and then share it with your team if the question arises.

Module 3.0 Get Clear HOW

In this module, participants learn that every organization operates with three core processes (DO, SELL, GROW), each at a stage of maturity. They learn to create a process diagram and to identify which of the three core processes most constrains their organization's performance and growth.

Pre-Session Preparation: Review your team's participant input on Maven Projects tab for 3.2 - 3.4.

Session Structure: This session includes one breakout and several polls. The instructor team will manage the polls. Please participate in the polls.

During the Breakout:

- Mixed teams will work on consolidating their submitted processes, entities, data stores, and flows for the Bank Case input. This task should be relatively quick.
 - The main focus should be on constructing a process map that logically integrates all elements.
 - Teams often struggle with recording and presenting their work. It helps if you are able to assist them by:
 - Accessing and downloading the templates provided in the breakout instructions.
 - Taking notes for the team or designating a participant to handle so doing.

In this module, participants learn the basics of process mapping, a valuable tool for ensuring alignment within a team and understanding business processes. While process mapping can be complex, its primary benefit lies in grasping the fundamental elements and how they connect to represent current or desired processes. Your role is to guide those new to process mapping, helping them avoid feeling overwhelmed and ensuring they don't get sidetracked by excessive detail. Emphasize the importance of using process maps to align teams and identify opportunities for improvement when it's beneficial. See [Why We Have to Work on Process Models](#) on IntelliVen.com.

Module 4.0 Get Clear HOW WELL

Encourage your team to identify the single process (DO, SELL, or GROW) that most constrains their organization, map it clearly, and examine it rigorously for opportunities to eliminate friction and unlock breakthrough improvement.

In Module 4, participants learn to assess their organization's performance by comparing current results with past performance, planned results, and the performance of similar organizations. The focus is on identifying and monitoring measurable indicators to evaluate progress. While financial measures are used to illustrate these concepts due to their universal relevance to organizational viability, the methods apply broadly to all types of performance assessments.

The main objective is to understand which indicators to monitor for evaluating progress. This may be straightforward for some teams, but those from subordinate or nonprofit organizations might face challenges. Assistance should be provided to help them identify relevant metrics. Remember, metrics must be quantifiable but do not necessarily need to be financial.

- **YOUR CASE Briefing:** Guide your team to prepare to present an MTL application. Now is a good time to coach the team to use one or more of the [Final Submission Templates](#). While some may feel apprehensive due to perceived risks and fears of vulnerability, preparing, presenting, getting feedback, and reflecting on their performance will be highly beneficial. The exercise serves as a mini-step towards the more comprehensive presentation in the Module 10 Executive Live Session. We will also show them how to use IVOA to deepen the feedback on their content.
- **Dashboards:** The key is to look at metrics in the context of both the original plan and updated projections over time. Most leaders are accustomed to reviewing static measures or comparing results only against past performance. Rarely do we find leaders disciplined in updating projections and holding themselves accountable continuously through a performance period. Our approach brings all three perspectives together on one page: past performance data, management's current updates, and the annual plan. An integrated view makes it easier for

leaders to see trends, spot issues early, and take timely action.

- **Disappearing Revenue Case:** In the exercise, participants work in breakout groups by team to determine strategies for addressing a significant reduction in revenue or funding, based on their preparatory submissions. An often uncomfortable but necessary aspect of the discussion is the potential need to reduce headcount. This tension is expected and acceptable.

During the full session, we will explore the reasoning behind these decisions and the strategic approach to managing such cases. We'll discuss why, in some situations, it may be preferable to help a few individuals find new opportunities rather than risking the long-term viability of the entire organization.

Module 5.0 Get Aligned

1. Stick Figure Exercise

This module's live session begins with a stick-figure exercise that challenges a leaderless group to come up with a consolidated figure. In breakouts, the goals for each group are to:

- Ensure all participants share their stick figure of a leader in action.
- Consolidate a group stick figure.
- Prepare to present their results in the main room.
- Reflect on the group's work.
- Complete these tasks within the allotted time.

Key Learning Points

The exercise underscores the importance of various acts of leadership and their diverse manifestations. Participants will practice "helicoptering up"—stepping back to observe both themselves and their group in action—and making conscious decisions about their role in the moment. This approach aids in using personal leadership skills (i.e., conscious use of self) to advance group objectives. It enables a significant step towards learning to Manage to Lead, starting with effective self-management.

Your Role as PC

Your job is to stay silent and to observe carefully how the group transitions from sharing their individual drawings to drawing a consolidated version. Take a few notes about what happens to help you when you share your observations with the full group later on, e.g., time, who spoke, to whom, what they did. Here is a sample sheet from a PC tracking how a group performed in this exercise:

TIME	<=>	QUOTES + NOTES	Brocton, Alex, Jenny
1:00	Brocton	let's get started.	Initiate
1:31	Alex	[Explains	Directions
1:54	Jenny Brocton	who's naming? Grants	Inclusion
1:20	B	I'll draw my stick figure. Poble Clear direct. Dealing ... clear goal. Help parallel. Specific Steps	Unify Present
2:48	B	what are your groups these pts?	Inclusion
3:07	Jen	goal oriented, supportive.	Metivist
3:38	Alex	They have a vision	Clear Quest
3:42		Holds up ○ Equality. Arrows <=> Back/forth communication	Present
4:29	B > A	on a group, still led	
		○ Treating as equals	Clear Q

Things to watch for:

- Taking too much time sharing in order to put off the harder task of consolidating.
- Absent an obvious leader, everyone demurs such that no one puts forward a first step towards a consolidated drawing.
- Someone just steamrolls the task. Who? Why did others let the person take the lead?
- Did anyone sit back and let the others do all the work?
- Did the group reflect on how they worked?
- Did the group make a plan to share what they had come up with?

The key point of this exercise is that you can't facilitate a consolidated drawing. Someone has to DO something to make the leap from individual figures to a consolidated drawing. How did this happen? Was there evidence of leadership along the way?

2. Overrun CTO Exercise

- This is a cohort role play using a **fishbowl** format.
- A subset of participants will role play the "disgruntled CTO and the CEO" case in real time inside the fishbowl.
- The rest of the cohort will observe carefully from outside the fishbowl.

Key Learning Points

- Explore how and when to use **RACI** to clarify accountability.
- Practice ways to **keep the monkey off the leader's back** and avoid taking on others' problems.
- See how to **reframe a tough situation into a learning opportunity**.

Your Role as a PC

- Observe closely what unfolds, both in the fishbowl and among the observers.
- Prepare to share what you notice when called upon — focus on behaviors, dynamics, and how the situation is handled.

3. Post Live Session Breakout

Work with your team to:

- Review how well the cohort learning environment is working.
- Coach your team leader to look carefully at 5.6 YOUR CASE prompt responses ... especially to question 3 as there is some important / useful information from team members for them to work with. It may be worth spending time with each member sharing their entry with the rest of the team for discussion. The question

is from Lencioni's Five Dysfunctions of a Team and tests for, and induces, vulnerability.

- Determine which Mandate, ECF, and W-W-W elements will serve as YOUR CASE for the remainder of the program. If the team struggles to make a decision, work with the leader to make selections. Remind the leader that it is a leader's job to make the decisions that need making. Even if the selections may not reflect a final "right" set, it's important to have definitive choices for modules 6 through 10.
- Ensure that the team is on track to recruit an outside reviewer of some standing for executive live session 10.

Mid-Term Review

PC's and their Team Leader arrange to meet with instructors to review how the program is going so far, and readiness for the second half. If the meeting has not yet been scheduled, take care of that right away.

At least 1 day in advance, you or the leader will submit to instructors the current versions of your Mandate, W-W-W, ECF (and note if they are locked in), along with the one initiative the team will work on in Modules 6-10.

In the review, we'll discuss:

- Reactions to MtL so far.
- What's working?
- Any surprises?
- What needs attention?
- Are we clear that coming out of Module 6 we need just one initiative to work on?
Note: in parallel or serially, you are encouraged to apply MtL tools and methods on other initiatives outside the program.
- Is at least one outside reviewer lined up to participate in your live executive session?

If you seek to provide support to the team beyond the program, now is the time to begin laying the groundwork and being explicit about the prospects. Let instructors know your thoughts and plans so they can provide advice and support to your efforts.

Module 6.0 Plan Change

YOUR CASE

Guide your team to create a list of initiatives *in advance of* Session 6.

1. Generate an initial list using some or all of the following approaches:

- a. Gather YOUR CASE inputs from Modules 1–5: W-W-W, Mandate, Do–Sell–Grow, metrics, and ideas for improvement. Use the Enterprise Change Framework (ECF) template or Sandbox Change Framework Assess & Suggest to capture the five elements: NOW, CASE for CHANGE, NEXT, WHAT MUST BE DONE, and ACCELERATORS/BARRIERS.
- b. Review and think through the collected elements, then brainstorm as a team to come up with possible initiatives.
- c. Enter the Mandate, W-W-W, and Change Framework elements 1 (NOW), 2 (WHY), 3 (NEXT), and 5 (Barriers) into the IVOA Sandbox. Include as many or as few (including none!) What Must Be Done entries as you like in element 4. Then RUN the CF. The Sandbox will provide feedback on all inputs and generate suggested entries for element 4 to stimulate team discussion and idea generation.
- d. Upload or paste screenshots of the W-W-W, Mandate, and some or all of the ECF into IVOA. Then enter a prompt such as:

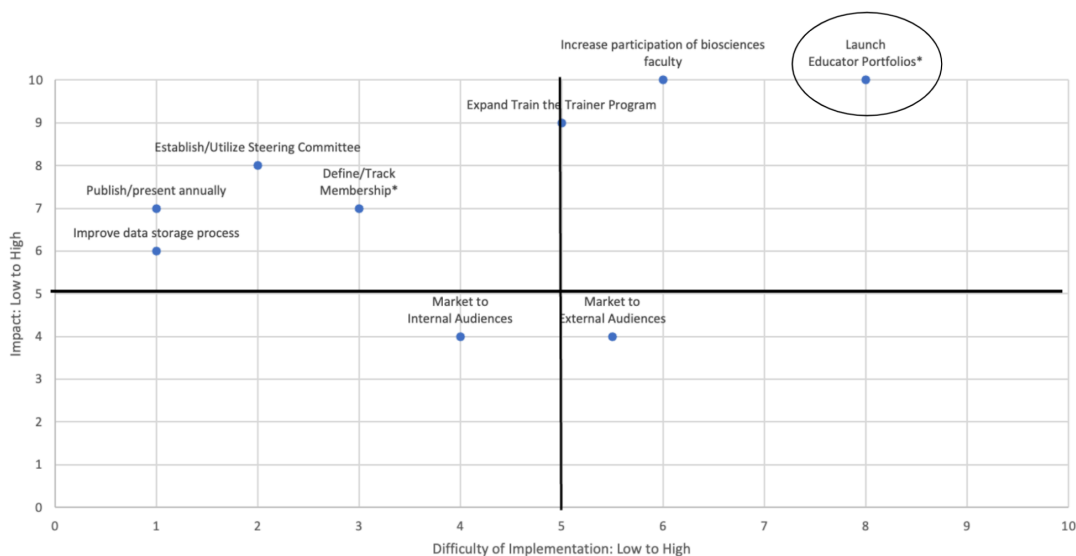
“Study the ECF, W-W-W, and Mandate loaded / below. Use deep reasoning to propose 8–12 initiatives that move us from NOW to NEXT while staying true to our W-W-W and advancing our Mandate. Start each with an action verb. For each initiative, include: the CF element it advances and by how much (1–5), expected outcome, 90-day milestone, 1–2 measures, likely barrier addressed and accelerator used, and whether it is a quick win or a build. Return as a de-duplicated, themed list. If any initiative conflicts with the W-W-W or Mandate, note it and suggest an adjustment.”

2. Consolidate and refine the output with your team.

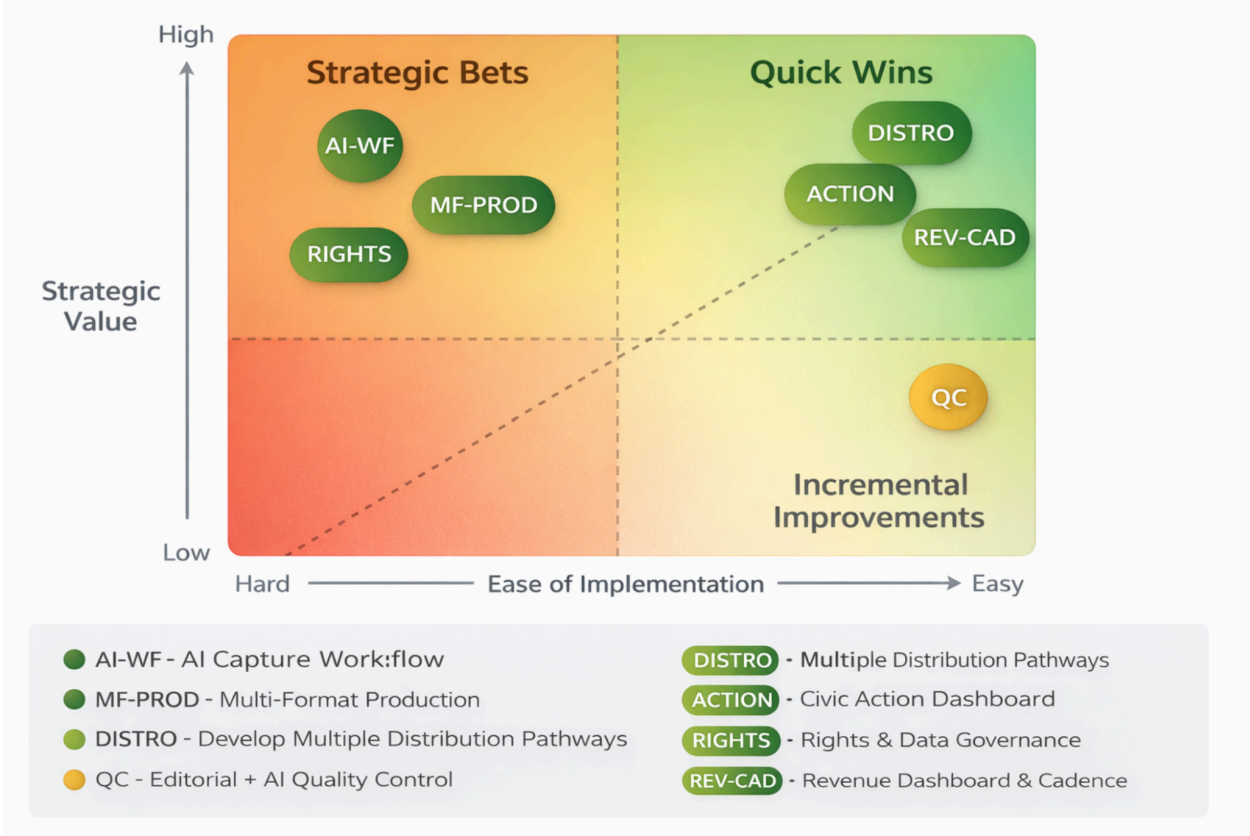
Keep, edit, or drop items, and add any that belong. Enter the initiatives in the [Initiatives Template](#), scoring each on impact and feasibility. Help the team distinguish between Goals, Initiatives, and Tasks. The result should look something like the following:

Initiative Name	Difficulty of Implementation (1=Easy, 10=Hard)	Expected Value	Lead
Establish/utilize Steering Committee	2	8	Alicia
Define/Track Membership	3	7	Claire
Improve Data Storage Process	1	6	Claire
Publish/Present Annually	1	7	Alicia
Launch Educator Portfolios	8	10	Lars
Increase Participation of Biosciences Faculty	6	10	Julie
Expand Train the Trainer Program	5	9	Christine
Market to Internal Audiences	4	4	Not current focus
Market to External Audiences	4	4	Not current focus

Note: Preparing this table *prior* to the Live Session for Module 6 is essential, because they will feed the list in Session 6 into the [Heat Map tool \(worksheet and map\)](#) to identify **one vital initiative that drives significant value and is relatively easy to launch now**; park the rest in a backlog. (PCs can do this on their own for their team in advance, but the team does not have to do so until Session 6.) The result should look something like the following:



Alternatively, the team can ask IVOA to generate a heat map from the table into a heat map a 2x2 with axes: Expected Value (low to high) and Ease of Implementation (low to high) to produce output like this:



Heat mapping tips:

- If initiative names run on top of each other, abbreviate, number or otherwise code them to take less space on the heat map.
- Reassure participants that having (too) many initiatives is a good sign. Earlier modules (2-4) were designed to inspire this kind of thinking, and many will now have an “aha” moment, recognizing that they’ve been building toward identifying key improvement initiatives. When the number of initiatives is large enough to make them hard to read on the heat map, organize them by type (e.g., Overhead, Revenue, Operations) and prepare a separate heat map for each type on its own spreadsheet tab.
- Rate ease of implementation and expected benefit using either an H-M-L scale or 1-10. Simplicity is key—more complex assessments are ok but aren’t necessary for this exercise.

For the selected initiative, complete an **Initiative Change Framework** and an **Initiative-to-Action** template to set up the transition to a work plan and prepare for governance. Be ready to present to the full group for feedback.

LOST LEADER CASE

- The exercise is **not** about participants proving they can solve another team’s business problem.
- The assumption we want them to carry is: **the answer lies with the leader and their team**. If it doesn’t, they’d bring in an outside consultant like McKinsey. Here, their value is in *facilitating clarity and alignment*.
- A key insight we want to surface: when working with a leader, one of two conditions are present:
 - The leader knows what they want, and the question is whether their team is clear and aligned around it.

OR

- The leader doesn't know what they want, and the work is to help them figure it out together with their team.

What to Emphasize to Participants

- Their role is to create the conditions where that distinction becomes visible.
- The path is the same either way: guide the leader and their team through **W-W-W, Mandate, and ECF**.
- The value is not in offering “the right answer,” but in helping the leader and team *discover whether they already have one and are aligned on it, or need to work toward one*.

Typical Participant Temptation

- By this point in the program, participants often overestimate how much they should “figure out” about the other team’s business. They ask probing questions and try to provide answers on the fly.
- **Remind them:** that doing so is a **wild goose chase**. They cannot know enough, and it distracts from the learning goal.
- The task is to offer to facilitate an offsite for the leader and their team to determine their path forward.

How to Frame It

Upon entering the breakout, you might remind participants:

“You’re not here to provide answers. Your role is to facilitate clarity. Assume the answer lies within the leader and their team. If it didn’t, they’d call for help from an organization such as McKinsey. Your job is to help them see whether they already know what they want and just need alignment, or whether they need to work it out together and, in either case, to help them do it.”

Module 7.0 Do & Review

In the Module 7 live session, we'll begin by working on Utilization Matters, Part A, as a cohort in the main room, based on participant prep.

For Part B, participants will break into mixed groups to complete the second half of the Action Review. Each breakout group will explore what happened, offering possible explanations and implications (i.e., WHY did it happen, SO WHAT, NOW WHAT):

- 20 min: Breakout in groups to address:
 - Why might this have happened? (WHY)
 - What lessons did we learn? (SO WHAT)
 - What should we do next? (NOW WHAT)
- 10 min: Return to the main room to explain group responses.
- 5 min: Discuss what happened.

Encourage teams to think creatively about all potential causes for the results. Teams often settle on one or two reasons and feel they're done. *Push them to keep exploring.* It's almost certain there will be explanations they hadn't considered.

At this point, teams should be comfortably in the habit of **making a plan to complete all tasks within the time allotted** and **helicoptering up**. If you see this missing, please reinforce the importance of practicing this skill. In Executive Live Session 10, they will have exactly 45 minutes to work with outside reviewers. We do not want them to say they didn't have enough time. The amount of time is fixed. Their job is to make the most of what they have.

Early-stage teams often have an overdeveloped bias for action, which can leave little room for deep reflection. Guide them to think critically about what happened, why, what they've learned, and how they can act based on those insights.

POST LIVE SESSION BREAKOUT

In addition to the Module-Specific Prompts, we want to be sure the teams are on track for their MtL final deliverable. Arrange for the team to share with you their **Initiative Change Framework** and the **Initiative to Action**, which will guide their work through the remainder of the MtL program. Once you receive their drafts, confirm with the instructors that the team is on track.

Also, **team leads should confirm their two Executive Reviewers** have invitations, and this [orientation to their role](#) in Live Session 10 - contact the TA if they do not.

Last, encourage them to **see the Follow-On material for Module 7** for live examples of how MtL tools help consultants grow their practice while guiding leadership teams to get clear, aligned, and on track.

- *What really happened in the Utilization Matters case*
- *MtL in Action: A Case Study in Using MtL to Build Your Consulting Practice and Your Client's Success*

Module 8.0 Get Help

Organization Dilemma Case

- We will break participants into three mixed groups representing different constituent perspectives (customer, function, region).
- Your job is to assist the group in developing a recommendation to the CEO on how to organize based on their perspective and their rationale. They do not have to lobby for their perspective. I.e., the group representing customers can decide to recommend organizing some way other than by customer. They are also not limited to the three choices.
- In the main room we will assign someone (instructor or PC) to serve in the role of leader. Each of the three reporters will present their recommendation with justification in turn. The leader listens carefully and asks one question of each reporter:
 - If the reporter suggests organizing by region, ask: **what do we do about customers that cross regions (like O&M)?**
 - If the reporter suggests organizing by function or customer, ask: **what to do about others feeling demoted?**
- **Note:** keys to this case:
 - The decision is difficult because some of those now reporting to the leader will end up reporting to former peers. Most participants won't get to this in their prep or breakout.
 - The leader is fearful to make the decision so avoids making it by looking for an elusive right answer. The point is that there is no right answer and the real challenge is to keep team members on board with whatever answer the leader selects. See this [Linked In post](#) and this [Intelliven blog post](#) on the subject.

Ogilvy & Mather Case Session

- **Activity:**
 - Participants will have already viewed the classic Charlotte Beers video as part of their preparation. We will show it again in class. The insights shared in this case continue to resonate, especially as the industry has evolved through the internet, social media, and now artificial intelligence.

The goal is to encourage participants to use MtL tools as a framework for assessing any case. This session focuses on a retrospective analysis,

empowering participants to apply these tools to every case they encounter in the future.

- **Group or Breakout (depending on number of participants and time to work with) Discussion:**
 - Do you agree with Charlotte Beers's assessment of the situation?
 - How have expectations about leadership style changed over time?
 - How does Charlotte's approach align with the practices covered in MTL?

Module 9.0 Grow

Preparation includes reviewing video content presented by Dr. Green, which is guaranteed to offer novel and engaging insights. Encourage your team leaders and members to reflect on this material and be ready to share thoughtful comments and questions during the live session.

Encourage teams to submit their responses to **9.2** and provide their assessment of their organization's **maturity stage** and **skills mix** in **9.3**. We will review submissions in the live session to highlight key takeaways.

It's common for teams to rate themselves as more mature than they truly are, and their skill mix often aligns with the benchmark for an earlier maturity stage. This is intentional as it helps uncover important insights and encourages teams to be more self-aware and deliberate in developing the ideal skill mix for their actual maturity level and to proactively prepare for the next.

Executive Team Skill Assessment Worksheet

- 1 Mark stage of organization maturity for your team with an **X**:

Mark its stage of maturity with an **X**:

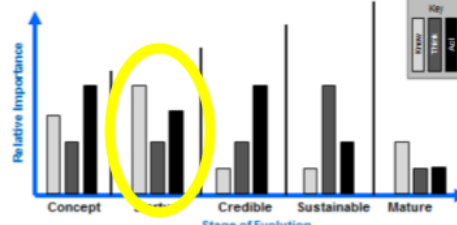


- 2 Draw a horizontal line to indicate the relative strengths of its top team in the three generic skill areas:

Draw a horizontal line to indicate the relative strengths of its top team in the three generic skill areas:



- 3 Compare team's perceived maturity and skill mix with success norms by maturity stage:



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- We will break out by team for members to compare their assessment of maturity stage and skill mix to develop a consensus to index into the K-T-A benchmarks by maturity stage.
- If any team wishes to present part of their brief or submission to the full cohort, they may be able to do so. Have your team leader contact instructors in advance

if they would like to arrange this.

- If time allows, we will break out to work on team materials and practice briefing other cohorts in preparation for executive live session 10.

Module 10.0 Executive Live Session

Objective: Prepare teams for the Executive Live Session, ensuring they effectively gather valuable input in the allotted time.

Focus: Executive Live Session Preparation

- **Purpose:** Assist teams in preparing thoroughly for the session.
- **Clarity on Input:** Ensure teams are crystal clear on the specific input they seek. A common pitfall is spending the entire session presenting without leaving adequate time for quality feedback.
- **Action:** Help teams identify one or two key areas where they seek input.
- **Orchestration:** Guide them in planning how to gather this input effectively.

Live Session Dry Run and Role Clarification

- **Dry Run:** Coordinate with the team leader to arrange a rehearsal of the session.
- **Roles:** Encourage team leaders to clarify and assign roles to ensure maximum value from the 45-minute session. Emphasize the importance of making the best use of the time allotted.

Team Lead Responsibilities:

- **Pre-read Materials:** Send materials to reviewers, including team bios (or equivalent, such as LinkedIn profiles) and information on the organization and initiative to avoid spending time presenting live.
- **Session Opening:** Open the session and welcome reviewers.
- **Introductions:** Invite team members to introduce themselves briefly; reviewers will have been introduced in the main room.
- **Session Goals:** Clearly state the primary objectives of the review session.
- **Agenda Review:** Outline the 45-minute agenda and time allocations for each item.
- **Norms Clarification:** Set expectations, e.g., invite reviewers to ask clarifying questions as needed but hold feedback until requested.
- **Meeting Flow:** Ensure the meeting stays on track and take appropriate action if discussions deviate or extend too long.
- **Role Assignment:** Assign specific roles to team members to ensure smooth execution of the meeting.
- **Follow-up:** Send notes of appreciation and, if appropriate, solicit ongoing involvement from reviewers.

Specific Roles:

- **Clock Watcher:** Ensure session adheres to the planned timeline item by item.

- **Meeting Recorder:** Document key points made during the meeting using a [meeting record template](#).
- **Facilitator:** Keep the meeting focused and prevent reviewers from monopolizing the conversation or derailing the agenda.
- **Video Recorder:** Designate a team member to record the session on their PC.
- **Chat Saver:** Assign someone to save the session's chat on their PC.

By following this structured approach, Principal Consultants can effectively guide their teams to maximize the value and outcomes of the Executive Live Session.

Final Submission

Guide your team to upload to Maven or send via email to instructors evidence of their application of MtL tools and methods to their for final grading and certificate award:

- With at least three annotated upgrades from the live session.
- In an editable form (i.e., not in PDF) so we can enter comments.
- No later than midnight Pacific Time one week following the executive live session (late submissions are penalized 1-point for every day late).

Please review and provide your own comments to what the team submits, along with your completed score sheet, prior to instructor review and in time to have back to the teams our collective feedback by a week following the submission deadline.

Locally recorded Zoom sessions can be retrieved from the recording computer in the DOCUMENTS > ZOOM folder with the file named the same as the executive session review date.

Follow-on

By now, you should have a thorough understanding of your team's goals, current status, and next steps for breakthrough. If you've established a strong rapport with the leader and team, you're well-positioned to offer ongoing assistance for hire. Feel free to pursue this opportunity as appropriate. Please keep instructors informed of your plans so they can support you.

For any work procured through IntelliVen with teams provided by us, we request a sourcing fee of 15% of the revenue to IntelliVen if the work is performed independently. If you wish to continue working on the IntelliVen platform, we will enter into an affiliation agreement where 5% of revenue goes to the person who sourced the work and 10% goes to IntelliVen. Please reach out to instructors as interested for help pursuing opportunities to provide teams with additional value.

For more information contact peterd@intelliven.com.