OD INNOVATOR

Meet
OD Innovator
J.P. Laqueur
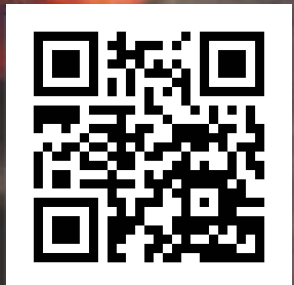
$5.99

Welcome to Project City

Transformation:
One Step at a Time.

Are you Really Collaborating?

What's wrong with Project Management?

MM-1NC

EDITOR'S LETTER

HOW TO TRANSFORM YOUR ORGANIZATION WITHOUT UPSETTING THE HIERARCHY

THE JOURNEY OF 1000 MILES

You want more collaboration. You want teams performing at their highest level. And you want to build a culture of success.

But because the organization is steeped in hierarchy it's difficult to build consensus on how to do that.

Leaders think leaders think they're already collaborating, and you know they're not. They want people to learn to lead without authority, and yet defer to command-and-control in their own leadership styles.

So, when you try to bring in solutions, you get stopped at every turn.

Unfortunately, this scenario is common among organization development professionals, in that they can see the answers to the problems their leaders have tasked them to solve but get stopped at every turn when executing.

And so you defer to some sort of known leadership training. But it's still directive in nature, and it only serves to reinforce the hierarchy.

The reality is that truly collaborative environments require new skills and tools for leaders and you can't get there with anything that reinforces directive leadership.

What do you do? Where do you start?

If you really want to move the needle on transformation, it's important to provide the necessary tools and skills that leaders need to foster better collaboration, and that starts with projects.

Projects are how you create and improve everything in your organization, so if you can get your project system running in an optimized way, you'll start delivering more on your strategy.

But we're not talking about traditional project management, as indicated by Mistina Picciano's article: What's Wrong with Project Management – and Why It's Easier to Fix than You Think.

Project management isn't a collaborative sport, it's more of a directive one. The project manager creates the plan and then delegates it out to the team members.

Project leadership emphasizes building high performing, empowered teams who actually do the planning as a team, using collaborative project process tools.

Therefore, project leadership a great place to start a shift in how organization are led and begin the process of optimizing the whole organization instead of the parts making it an appropriate first step in the transformational journey.

And, it is the most important training ground for future leaders because it teaches facilitation, not delegation.

In other words, leaders facilitate team decisions and don't make them on their own.

And best yet, providing these skills and tools won't upset the hierarchy. You can sneak them in—coming from an angle and letting it snowball throughout the organization.

People naturally want to work this way.

They want to be collaborative.

They want to be productive.

And they want to build valuable relationships.

Also in this issue, be sure to check out our interview with J.P. Laqueur, the co-founder of BrandFoundations, a New York–based consultancy that helps organizations align culture with the larger brand story. Laqueur talks about how they help to bring company cultures into alignment, especially after a merger or acquisition.

And if you haven't read Switch: A Practical Guide to Creating Effective, Long-Term Change, make sure you put it on your reading list. It talks a lot about what's happening psychologically behind the scenes with any change initiative. My favorite is the Rider and the Elephant analogy, which I can see happening in real-time in my own life.

Jason Myers
Editor-in-Chief

TABLE OF
CONTENTS

CLASH OF THE TITANS:
SALES VS. MARKETING

PAULA MARTIN

Why don't Sales and Marketing just get along?

Why are they so often at war with each other?

One would think they were the most natural of pairings, as opposed to R&D and Marketing, for example, or Sales and Manufacturing.

Don't Sales and Marketing have the same goals?

You would think so, but it's not how it works, and I'm here to tell you why.

THANK PETER DRUCKER

Back in the 1950's, management guru Peter Drucker came up with the idea of "management by objectives", which became the idea of taking business strategy and dividing it up into goals for individual functions or areas.

These goals were further divided up and cascaded down through the hierarchy until finally they landed on the performance plan of an individual sales or marketing rep.

This all sounds very reasonable and as a result, it is still used in most organizations today. But it's actually not reasonable at all.

In fact, it's irrational and counter-productive, but in order for me to explain to you why that is, you're going to need to buckle up and prepare for a little theory, because sometimes theory matters.

THE WORLD OF
MARKETING AND SALES
IS STILL FLAT

If you were Columbus and your theory was that the world was flat, heading west to discover the riches of the Far East would be crazy, but if your theory was the world was round, well then, you're sane as can be.

Sales and Marketing, as well as all other functions in organizations, is working from a "the world is flat" theory.

That theory goes something like this: if you optimize each individual area or person, then the whole organization will be optimized. That translates to incentivizing individual sales reps to sell as much as they possibly can.

The more they sell, the more money they make.

For optimizing Marketing, we set goals for branding, where leaders are held accountable for measurements that pertain to that function, as opposed to revenue—which should really be the priority for the organization.

In short, we reward all of them (Sales, IT, Manufacturing, R&D, etc.) based on whether they have achieved or exceeded the goals of their functions.

THE ROOT OF
ALL OF OUR PROBLEMS

That process of goal setting by individual area, in order to make that area as successful as possible, is the root of most organizational problems today.

Therefore, it's not talent or culture--it's goal setting and governance.

How are organizations governed? Each individual area governs themselves - the head of Sales governs Sales. The head of Marketing governs Marketing. They have the power over what happens in their areas.

It's their fiefdom and no one touches their fiefdom or there will be war. And war is what we have, and that's because the world is flat theory is based on the idea that competition is good for an organization.

Let's get this straight.
Competition destroys organizations.

Competition may be great in the marketplace, but it's toxic in an organization.

Sales and Marketing simply cannot be competitors—especially today when salespeople struggle like never before to get in front of prospects.

They need to have a common goal that's based on what's best for the organization as a whole, and they need to cooperate to help meet that goal.

They aren't doing that now, at least, not in any systemic way.

Yes, they might cooperate on a project here or there, but basically they are run as two separate armies with different and sometimes contradictory missions.

Tell me this isn't true.

Tell me that Sales and Marketing is completely integrated in your organization, that they are governed by a cross-functional steering council made up of people from Sales and people from Marketing, as well as other stakeholders, like Manufacturing and Customer Service. Tell me that they have the same goals, not different ones, and they are collectively accountable for meeting those goals.

If this is the case, call us, we want to do a case study on you.

In 25 years, I haven't seen it yet, but I'm sure there are some bright spots out there.

We need to spread those bright spots and put an end to the war.

ORGANIZATIONS HAVE THE SAME GOAL

Sales, Marketing, Customer Engagement, Customer Service – they all have the same goal – acquisition and long-term retention of customers and clients.

These areas need to be integrated and aligned––not by restructuring them into one big vertical army, but by creating horizontal governance that oversees the customer experience.

When you see that the world is round, the sharp dividing lines between functions are non-existent. Instead, we focus on the process of which they are all a part and we govern that process.

There are stages to the process and more than one group can contribute to each of those stages in different ways. Classically, marketing will help to populate the first stage of the process, but leads might also come from sales doing networking or customer engagement asking for referrals.

When you govern the process instead of individual functions, you can get a good flow happening through the process and you get cooperation between the various areas of expertise – between the expertise of selling and that of marketing. But they have to have a common goal and they have to be governed as a process, not as functions.

Sounds pretty simple doesn't it?

Well it is really, so why don't more organizations take this approach?

Ah, well there is the problem that the way they are approaching it now seems like it's the right way to do things because that's how it's always been done and how most everyone else does it.

THEY NEED TO HAVE A COMMON GOAL THAT'S BASED ON WHAT'S BEST FOR THE ORGANIZATION AS A WHOLE

AND THEN THERE'S THE PROBLEM OF POWER

- The head of Sales and the head of Marketing will have to give us their positional power and step out of the hierarchy.
- They will have to work collaboratively with other groups that have a part in the process. They will have to make decisions together.
- Their people will have to take direction from cross-functional teams.
- They will lose the power of the vertical dimension.

Most senior leaders have egos that aren't so thrilled about giving up power. They like the drama and the fight. They like being the general in charge of everything in their areas.

That wouldn't be so bad if it wasn't for the fact that they are killing the organism in which they live - the organization as a whole, and that their approach creates disengagement, disempowerment, discontent by the people who have to execute their whims.

They lose talent because Millennials don't want to work in this old power kind of environments. They want collaboration and teamwork. They want to be engaged and make a difference. They know how to work with others.

And so the Titans will have to decide when they are ready to lay down their weapons of war and sign the peace agreement, where they put what's good for the organization ahead of their own lust for power and they create an environment where bringing in and retaining new customers is more rewarding than falling off the edge of the world.

There is a way to stay alive, I'm just not hopeful many will actually pick up the pen and sign the agreement.

OD INNOVATOR

Paula Martin is a Master Level Certified Matrix Management Consultant™ (CMMC™—MOL), and the CEO and Chief Creative Officer of the Matrix Management Institute. She is the developer of the MM 2.0™ Operating System, and the author of the Matrix Management 2.0™ Body of Knowledge, the Matrix Management Reinvented book series, and more than 10 other books on topics related to Matrix Management and Managing Projects in a Matrix.

THE INTERNATIONAL MATRIX MANAGEMENT INSTITUTE INC.

CHALLENGES YOU TO

EVOLVE

ANY ORGANIZATION THAT NEEDS TO OPERATE IN TWO DIMENSIONS IS A MATRIX ORGANIZATION.

RUNNING A MATRIX SO THAT IT'S ALIGNED WITH AND DELIVERS YOUR ORGANIZATIONAL STRATEGY MAY REQUIRE A SHIFT IN THE WAY YOU LEAD AND MANAGE YOUR MATRIX.

THE INTERNATIONAL MATRIX MANAGEMENT INSTITUTE OFFERS END-TO-END, EXPERT MATRIX MANAGEMENT 2.0™ (MM 2.0™) SERVICES TO ENSURE YOUR MATRIX SUCCESS.

FROM CONSULTING AND ASSESSMENTS TO ORGANIZATIONAL RESTRUCTURING AND TRAINING, WE'VE GOT YOUR BACK.

BE PART OF OUR FORWARD THINKING CLIENTELE

NASA   Pfizer   BEST BUY   PEARSON Education

Johnson&Johnson   PENTAX

IN THE MATRIX MANAGEMENT REVOLUTION

WWW.MATRIXMANAGEMENTINSTITUTE.COM

MEET OD INNOVATOR
JP LAQUEUR

Mistina Picciano

This month's OD Innovator Spotlight features marketing veteran JP Laqueur, co-founder of BrandFoundations, a New York-based consultancy that helps organizations align culture with the larger brand story. He is the author of the article "Mission, Vision & Values Are Dead," which has been shared thousands of times on LinkedIn.

How does your work in branding overlap with organizational development?

At BrandFoundations, we operate at the intersection of brand and culture. When Steve Goodwin and I launched in 2012, we saw the opportunity and power of companies that had both a great brand story—an aspirational story bigger than the product or service—and a well-aligned culture. With those two ingredients, companies had outsized performance and incredible success.

I was at MCI in the early '90s. It was an organization with a great story: we weren't just saving people money on long-distance calls; we were breaking up a 100-year-old monopoly and introducing new technologies to the world. Behind this aspirational story was a great culture that rewarded risk-taking and innovation—something I experienced firsthand.

Since then, I've been personally driven to create organizational environments where people feel a sense of purpose in their work, some noble cause that they're delivering on. We started BrandFoundations with that goal in mind, and this approach has differentiated us. Not many companies will look at your culture and dig deep, making it a core part of their practice.

What does a typical brand-and-culture engagement look like?

Often, we work with organizations that are experiencing an identity crisis because of a major change. They may have new leadership, or they've been bought by a private equity firm. Maybe they've made a major acquisition or merger. We usually come in during in the first 12 months, at which time we generally get an audience with the CEO, who is typically the only person who cares equally about both human resources and brand.

We tease out the underlying purpose and cultural attributes by engaging everyone at every level. For instance, we use a survey tool called CultureTalk to measure the presence of archetypes in the culture and to see which ones are predominant. Each of us individually has these deeply seated archetypes that are genetically imprinted from tens of thousands of years of storytelling: the hero, the caregiver, the good wizard that goes to the dark side. Well, no surpirise, they existing in group cultures, as well. Once we identify the dominant archetypes in an organization, we explain what it says about their brand and culture. Then, we look at ways to harness those traits: "Your IT guys have a caregiver streak. Maybe they can support customers because they want to help and solve problems."

Our role is to create a conversation. We shine a light or mirror up to the organization to better understand the culture and its demographics, as well as how it shifts within the organization. We help them to see themselves differently, but it's only the start. We bring in partners who have more experience in guiding and leading that culture shift.

Do you ever encounter resistance?

By the time a company brings us in for an engagement, senior leadership is usually committed to getting clarity on the culture and bringing everyone into alignment, but we sometimes have pockets of people that push back. Our work will often turn up some interesting gaps. For example, leadership may think this is who we're all about and what people believe, and that's a conversation that we have to have. We'll tell them what we think they need to do, but it's up to them. We caution them about the risks of promoting a brand not backed up by culture.

We also point out the shadow side of the archetypes and belief systems. All archetypes have positive and negative attributes. In the B2B tech space, we see a lot of cultures dominated by heroes and caregivers, which share some attributes. Both go above and beyond to deliver on purpose and mission; they'll work themselves to the bone. On the downside, they can burn out. Heroes need to slay the dragon and to win; otherwise, they can become political and backstabbing, turning on each other. Caregivers need to be thanked and recognized, or they can become disenfranchised and needy. If you know what to look for, you can take steps to manage those risks.

Uber had a very magician-like brand and culture, based on wowing and delighting people. That organization, under its founding CEO, began to go to the dark side. It was using it's technology to manipulate drivers and the authorities. It created a cult of personality around the CEO. These are common in a magician culture taken too far. It wasn't balanced by a ruler, an adult in the room. That's another thing you see in exploring culture and archetypes; there are some natural pairings and balancing elements. If they're not there, you can bring them out. By making the organization more self-aware and more conscious of its habits, we can often get past any pushback.

WHEN LEADERS ARE WILLING TO LET GO AND TAKE A STEP BACK, THEY'LL GET A LOT FARTHER.

What traits seem to predict a successful organizational transformation?

A willingness to let go is one of the most important traits. When a company hires a branding firm, they feel that the brand is very important and that leadership needs to drive that process. Often, they go off-site, brainstorm and roll out the new brand. But if the people who have to deliver on that brand promise every day haven't participated, they're not as likely to buy into it.
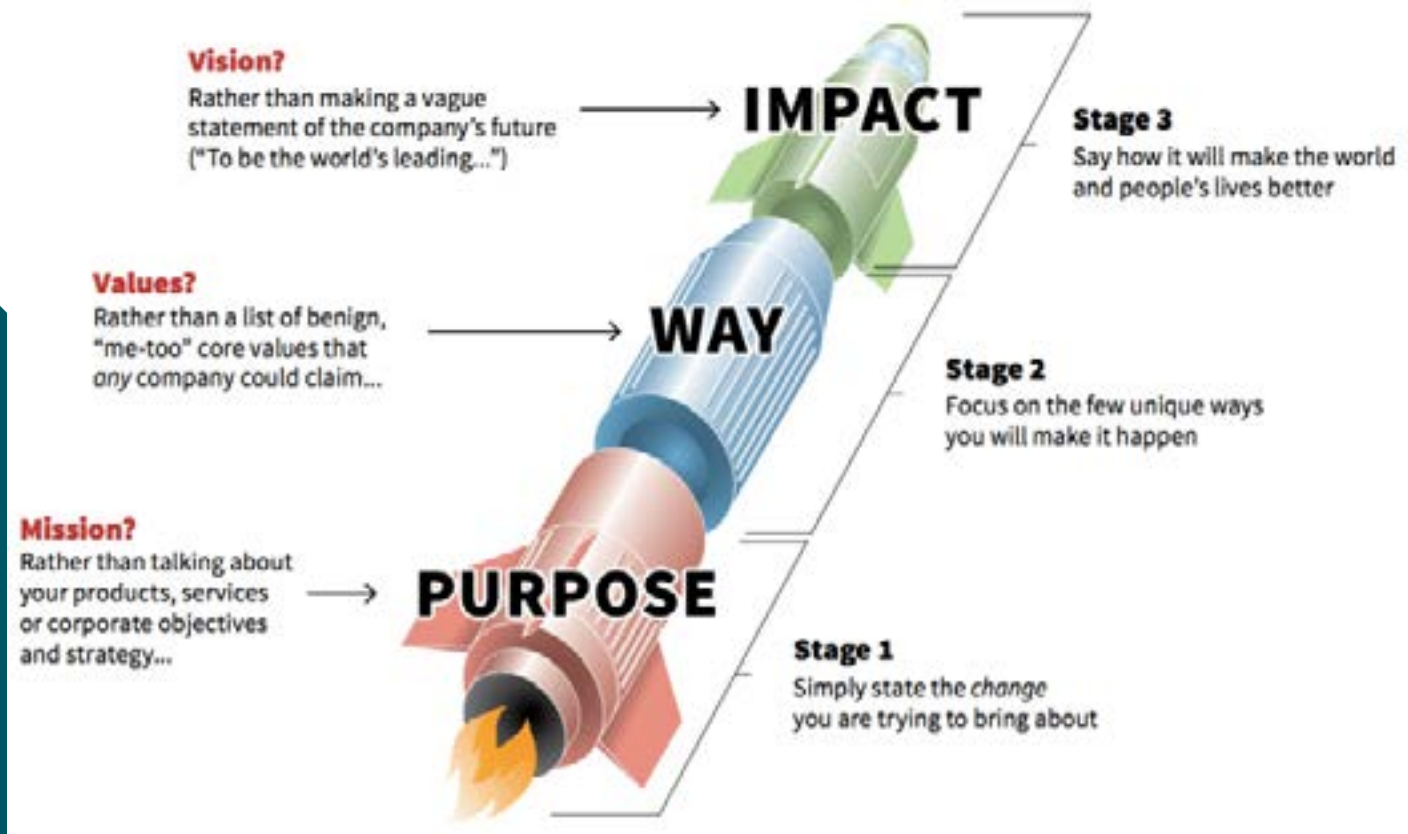
We flip that process upside down. Obviously, the leadership team and founder will have significant input, but let's let the organization tell us what they think the brand and culture story is here. We'll tease it out from them, and then leaders make sure it's in alignment with their vision. Obviously, there's a chance for a disconnect, but that very rarely happens. Instead, what comes out tends to be more lively, and people feel more empowered. Leadership can talk about the brand, but employees have to live it every day. They have to feel a sense of ownership and pride.

When leaders are willing to let go and take a step back, they'll get a lot farther. They'll hear things they may not have considered before, and they'll learn a lot more. They'll be a more agile organization if they let the rest of the company have a say in who they are and what they're all about, and then get behind it and champion it. To allow everyone to come together and coalesce around a process is a powerful thing and says a lot about leadership.

This seems like a good time to talk about your purpose-driven approach. How did you come up with that model?

Defining an organization's higher purpose is a key to the brand. It ties everything together. This is usually expressed in the framework of "mission, vision and values." Knowing how important a mission or vision statement could be in an organization, I began to dig into the topic for a thought leadership piece. What I found was that many mission statements are terrible. Also, everyone has integrity as a core value, which isn't differentiating.

When you run a Google search on the difference between a "mission statement" vs. "vision statement," you get hundreds of millions of documents. I decided I'm not writing another article on this. In fact, we declared that "Mission, Vision & Values Are Dead." This model first showed up in the 1960s, and it captured the imagination of a post-WWII generation. Today's millennial workforce is very different; they want to make an impact.

Vision?
Rather than making a vague statement of the company's future ("To be the world's leading...")

→ **IMPACT**

Stage 3
Say how it will make the world and people's lives better

Values?
Rather than a list of benign, "me-too" core values that any company could claim...

→ **WAY**

Stage 2
Focus on the few unique ways you will make it happen

Mission?
Rather than talking about your products, services or corporate objectives and strategy...

→ **PURPOSE**

Stage 1
Simply state the change you are trying to bring about

What's your alternative to "mission, vision and values"?

We created a model based on a three-stage rocket: purpose, way and impact. The purpose is the reason why you start the business, and it's very change-driven. There's a problem, and you want to change it. The way statement identifies the one or two unique ways you'll go about pursuing that purpose. The impact statement describes the last stage of the rocket. After you've launched and gone through the growing pains and built your culture and you're finally in orbit, you look down at the world and see, how have you made people's lives better? The impact should be something big and lofty: lives are improved, new opportunities are realized. You may never quite achieve it, but it's your North Star that keeps you going.

We used the example of Southwest Airlines. In the 1970s, flying wasn't affordable, and they wanted to democratize air travel. That was their purpose. They did it by cutting costs and focusing on the human experience, offering fun and humor instead of peanuts and perks. Those two things guided how they ran the business. The impact: More travel, more connections, more shared experiences make life richer and bring humanity closer together.

What implications do brand and culture have for OD professionals?

Elevating the brand and culture story is a way for OD professionals to tell a strong internal brand story—not only for sales, but also for engagement.

OD professionals are sitting on one of the most valuable parts of an organization. The biggest driver of valuation is intangible, roughly equated to brand and culture. KPMG surveys have shown that, when a company is sold, 50% of the company price is allocated to goodwill. Certain industries, like technology, may attribute up to 80% of the valuation to goodwill. Goodwill is the promise of what the company will be worth: people, culture and brand. Where marketing can show ROI with campaigns, HR has a hard time showing ROI on culture. Focusing on valuation changes that.

By being stewards and building resiliency into the culture, OD professionals can have a huge impact on valuation. Resiliency is especially important because those intangibles are more precarious than ever. Look at what happened to Starbucks in Philadelphia. Starbucks is very clear on their higher purpose.

They don't just serve coffee; they created that third place for people to go to—not just home or work. When those guys were thrown out, someone running the store was not in touch with the organization's purpose, and it was a total affront to what they stood for. They knew what to do: shut every store down. That situation could have been a horrible PR disaster, but they did a good job of turning it around.

When these things go bad, they have a huge impact on the valuation of the company. The culture can very much undermine the brand. One financial institution tried to recreate their model into retail stores. The goal was to sell every account holder eight different services. Not shortly thereafter, they had 40% turnover in their branches—something that's normal in retail, but horrific in banking. Understanding your brand, what you stand for and your purpose and how it ties back to your organization, all that had better be in alignment, or you have the potential for something to go really rogue.

What challenges and opportunities do you see for the OD industry?

First off, OD professionals generally work under the umbrella of Human Resources, and HR usually doesn't have the pull to get involved with brand. As I just mentioned, taking part in the branding conversation offers a way to gain influence in the organization.

Another way to increase their influence is to get better at internal communication. Right now, chief marketing officers have a lot of influence and budget, but most marketing departments aren't experts at internal communications. By filling this need, OD people can better partner with their marketing peers and expand their contributions to the organization.

Most companies in the US are service businesses, and the brand is the people and the experience you have with the people. We need to break down the wall between HR and marketing. Why not have a C-suite leader that owns both disciplines since they're so complementary?

Why do you see the need to marry HR and marketing? What do modern organizations need that they're not getting?

The old mentality was that people were the biggest expense: "It's our biggest cost, so make the CFO stay on top of it." It's a scarcity mindset, and it has to change by recognizing people as our biggest opportunity. To grow the business, to be profitable and agile, and to know our customers, all of that lies with our people. They can be our best marketers, our brand evangelists and our top recruiters. That's an abundance standpoint, and it's also the mentality of marketing and sales—looking at the world not from a cost basis, but searching for the opportunity. If HR is driven by marketing-oriented mindsets and taps into the leadership's vision, they have an opportunity to get more out of people, to better understand their skillsets, and to find untapped resources.

We're working with a client that's creating software platforms to help you understand latent skillsets in your employee base—not just the skills that they use at work, but the things they love to do on the side. When you find ways to bring those skills to work, it brings a different mentality and ups the engagement. Ultimately, unlocking that potential in your people is what will make organizations agile. Employees will be happier people who are willing to stay. They'll get more done with less. They'll outcompete. They'll see where the market's going and get ahead of it. ⬛ INNOVATOR

DEFINING AN ORGANIZATION'S HIGHER PURPOSE IS A KEY TO THE BRAND.

SWITCH:
A PRACTICAL GUIDE TO CREATING EFFECTIVE, LONG–TERM CHANGE

Mistina Picciano

For many people, the new year represents opportunities for both professional and personal growth. January 1 ushers in new strategies for organizations where fiscal and calendar years coincide. And who hasn't made at least one New Year's resolution at some point in their lives?

Whether implementing a new inventory management system or resolving to hit the gym three times a week, change is hard. *Switch: How to Change Things When Change Is Hard*, written by Chip Heath and Dan Heath, examines the fundamental reasons behind human inertia and offers a three-step system for overcoming these innate tendencies. Even though the book was first published in 2010, its challenges and solutions remain relevant. In fact, the accelerated rate of change in today's dynamic world makes the message timelier than ever.

HARD CHANGES, EASY FIXES

Switch opens by describing an experiment in which researchers gave moviegoers a soft drink and a bucket of popcorn. Some people received medium buckets, while others received large tubs, but everyone received more popcorn than one individual could eat. The popcorn, however, was terrible; it was nearly a week old. Despite the abysmal quality of the popcorn, variations of the experiment all yielded the same results: the moviegoers with larger buckets consumed 53% more than those with smaller containers.

Someone viewing the experiment data—minus information on bucket sizes—would likely conclude that some people have healthy snacking habits, while others are gluttons. A public health expert analyzing the same information would probably respond by educating the overeaters on the dangers of excessive popcorn consumption. Yet, the experiment reveals a simple, but effective solution: if you want people to eat less popcorn, shrink the container.

The popcorn experiment illustrates a key premise of the book. Too often, we turn "easy change problems" like reducing the size of a popcorn bucket into a "hard change problem" like changing the way that people think. In the words of the authors, "What looks like a people problem is often a situation problem."

THE RIDER CAN IMPOSE HER WILL ON THE ELEPHANT FOR ONLY SO LONG BEFORE THAT TEMPERAMENTAL CREATURE FINALLY GETS ITS WAY.

THE RIDER AND THE ELEPHANT

The authors make the case that all change ultimately comes down to behavioral change. At some point, change requires someone to act differently. Successful behavior modification requires reconciling two independent systems in the human brain: the rational system and the emotional system.

Switch uses the metaphor introduced by <u>social psychologist Jonathan Haidt</u>, who compares the rational system to a rider atop a massive elephant, the emotional system. The rider has the information to make decisions that serve our best interests, such as going to the gym and eating more fruits and vegetables. But that massive elephant is driven by instinct and our desire for instant gratification, preferring short-term pleasures like chocolate cake to the long-term goal of a smaller waist. The rider can impose her will on the elephant for only so long before that temperamental creature finally gets its way.

The outsized influence of the emotional system explains why so many New Year's resolutions are abandoned in January and most organizational transformations fail. When we want to effect change—whether at a personal, organizational or social level—we typically appeal to the rational rider. We collect data, create charts and presentations, and build an air-tight case for the new behavior. But ignoring the elephant ensures that the status quo will prevail.

To show the power of emotional appeal, Switch relates the experience of a manager who wanted to save his manufacturing firm $1 billion over five years. Instead of analyzing cost centers across the organization and presenting his findings in a mind-numbing PowerPoint deck, he focused on one example of inefficiency: work gloves. He asked an intern to identify the different types of gloves used throughout the company, as well as their costs. The intern then collected samples of each glove—424 total—and attached its price tag. The manager piled all the gloves in the center of a conference-room table for inspection by the leadership team. This unconventional exhibit inspired a visceral reaction in the executives, who were shocked both by the total number of gloves purchased and by the vast pricing discrepancy that resulted from letting each factory negotiate its own rates.

CREATE CLARITY (OR DIRECT THE RIDER)

Bringing the elephant on board is critical to long-term behavioral change, but motivation alone won't do the job. The elephant needs clear direction—something that can create issues for the rational rider, who often suffers from "analysis paralysis." Without a specific destination in mind, the rider tends to lead the elephant in circles.

Consider the noble goal of "working smarter, not harder." A dozen people can interpret this aspiration in at least a dozen different ways. One person may turn to email batching, checking for messages only twice a day. Someone else may experiment with creating standing appointments for important projects, scheduling sacred time when he won't be available for meetings or other activities. Yet another individual may elect to start the work day early, to knock out key tasks before business hours start. While any of these practices could improve personal and professional productivity, most people adopt these prospective habits simply because they worked for this superstar CEO or that business guru.

A more effective approach is to identify the target destination and to develop a concrete plan for reaching it. For instance, someone who wants to create new career opportunities by establishing herself as a thought leader may decide to launch a blog that forms the basis of a book. She sets a daily writing goal of one hour. Because she has a full-time job and two school-age children, she'll need to carve that hour from parts of her schedule already occupied by social and family obligations. She comes up with two criteria for assessing the value of current and prospective commitments.

• *Outsource when possible.* Grocery shopping takes two hours each week. By using a grocery-delivery or meal-kit service, she can reclaim some of that time for writing.

• *Focus on the priority.* She decides to evaluate every optional activity in terms of whether it advances—or hinders—her blogging goal. She enjoys her book club, but reading romances and thrillers won't enhance her expertise. Plus, taking a hiatus will free more than ten hours each month.

Setting such guidelines simplifies the daily decision-making process, which wears down the rider's finite supply of focus and self-control. Our aspiring blogger has created clarity in the form of two rules that will free her time now—and protect it in the future.

HARNESS DESIRE (OR MOTIVATE THE ELEPHANT)

With a clear goal and action plan in hand, the next step is to entice the elephant to take the journey. Knowing what to do and why to do it usually isn't enough to make change stick. People need to connect emotionally with the desired results, like the outraged executives who saw the glove exhibit. More than mere change, magic happens when people operate from a strong sense of purpose, a passion that arises from fulfilling their core "why."

In the example of the budding blogger, she wants to improve the professional lives of millennials by sharing best practices on how to maximize one's impact and flexibility in any organization—even within a traditional corporate setting. She plans to offer guidance on identifying potentially receptive employers, as well as actionable tips for shaping one's role, drawing from her own experience and that of her friends and colleagues. Her inspiration comes not from the desire for personal fame, but from a calling to fill a need.

But motivation alone may not be enough to keep the elephant going. The emotional elephant is easily spooked, especially when the rider wants to take it into unfamiliar territory. For this reason, the authors recommend shrinking the change. Lowering the bar allows the elephant to score easy wins, giving it the confidence to push further.

Even seasoned writers are daunted by facing a blank page. Instead of starting at one hour each day, the blogger aims for five minutes. Such a low goal may sound silly, but it's so easy to manage that even a recalcitrant elephant will likely acquiesce. Often, the hardest part of any change is simply getting started. Once the change is in motion, most people figure they might as well stick with it for a little while longer, and five minutes turns into fifteen or twenty. Only requiring five minutes per day—at least, at the beginning—offers a non-threatening way to create a habit based on the desired change.

MAKE THINGS EASY (OR SHAPE THE PATH)

Speaking of habits, developing these automated tasks is one of the best ways to ingrain change. People are "creatures of habit" because routines decrease the mental load required to function. Learning new skills and behaviors demands focused attention—something we possess in limited quantities. With repetition, these actions shift into auto-pilot, which appeals to the elephant's desire to take the easiest route and frees the rider for other matters.

One way to encourage positive habit-building is to set "action triggers." Returning to the aspiring blogger, she brews a pot of herbal tea each night after her children go to bed. She decides to make this her trigger: after she pours her tea, she will sit down to write. Incorporating the desired behavior into her evening routine removes decision-making and self-control from the equation. She doesn't stop to evaluate her motivation each night; she simply follows the path.

Modifying the environment is another way to engineer successful change. Altering the situation often alters the behavior. For instance, the blogger's previous routine involved watching television in the family room as she drank her tea; moving into the dining room with a laptop cues her brain to follow the new writing routine. Removing temptation is another effective way to change the environment—deleting social media and gaming apps from one's phone, for example, or storing the television in the basement (although other household members may object).

Anything we can do to make change easier—whether setting out gym clothes the night before or reducing the steps to file an expense report—will increase our chances of long-term success. Tweaking the situation so that the desired behavior becomes the default decreases our dependence on the rider's self-control and the elephant's mindset. As shown in the popcorn experiment, such adjustments can transform a challenging "people problem" into a manageable "situation solution."

OD INNOVATOR

WHY LEADERS THINK THEY ARE COLLABORATING WHEN THEY'RE NOT

Jason Myers

Leaders talk a good game about when it comes to collaboration.

They've watched competitors out-innovate them and suddenly get religion around cross-functional collaboration. So, they collect inputs from stakeholders and collect those inputs to make a decision, which then gets shared with the team.

But that's not collaboration.

It's merely an extension of directive leadership disguised to look like a collaborative, team effort, but a single person is still making the decision and passing it "down" or out to stakeholders or direct reports.

Let's not call this collaboration. (It's actually the RACI model of decision-making.)

In this model, the leader navigates who needs to provide inputs—who needs to be consulted, who's accountable, etc.—so he or she can make a decision.

But it's not possible for an individual to make the best decision singlehandedly, particularly for strategic decisions or others that have a wide impact.

TRUE COLLABORATION REQUIRES THE RIGHT TOOLS

Following structured processes or sets of steps helps ensure that teams will arrive at the best possible outcome—whether solving a problem, doing a risk assessment, creating an adoption plan, etc.

Whatever the team task, it goes more smoothly and creates a more robust solution when a collaborative tool is used and someone (usually the team leader) facilitates the process.

In a collaborative model, key stakeholders are assembled in a team, and the leader acts as facilitator of the decision-making process. The leader shares the process that will be used to make the decision with the team. (It helps if there is a standard collaborative decision-making model that everyone uses so the team knows the steps ahead of time.)

Then, the team begins working through the decision-making steps.

1. **The first stage is Define.** The team clarifies the parameters of the decision they need to make, and the facilitator records the team's discussion and any conclusions.

2. **Then, the team moves on to the next stage, Choose.** Here, the team decides on the criteria they will use to make the decision. They may brainstorm with self-sticky notes, which the facilitator will collect and help organize so that the criteria are clearly defined and weighted. *Note: The facilitator doesn't have a say in what the criteria will be or how they will be prioritized. This person's job is to ensure that the team follows the process and that team dynamics are productive.*

3. **Now comes the Identify stage.** The team reviews the criteria and identifies possible solutions.

4. **Finally, we arrive at the Decide stage.** The team analyzes options versus the criteria. At the end of this stage, the team should reach consensus that they have made the best possible decision. In addition, the team and the facilitator have captured their thinking throughout the process so they can explain—and sell—that decision to others.

True collaboration requires participation by all team members, which creates engagement in the process and, through this engagement, ownership of the results.

THE NEED FOR CONTROL KILLS ENGAGEMENT

The reason we haven't moved beyond directive leadership is because leaders don't want to let go of control. They think they can solve problems better than their teams, and they don't trust the teams to make decisions—particularly when the leader will be on the hook for the team decision.

They want to make the decisions themselves, and they want engagement and ownership from the team. But it's not going to happen.

To create engagement and ownership, you have to let people participate fully in the process. You have to let them make decisions. You have to stop trying to control both the decision and the team.

Well, that's a scary proposition for many leaders. After all, they're being asked to eliminate controlling behavior, but they're still on the hook for the results.

But if you think about it, you never really have "control" over all the people whose buy-in you need to implement whatever decision you want made. Sure, you can order around your direct reports, which may include an entire department. But what about other departments that need to adopt your solution?

When you stop to consider how limited your personal control is, you start to recognize the greater benefits of collaboration.
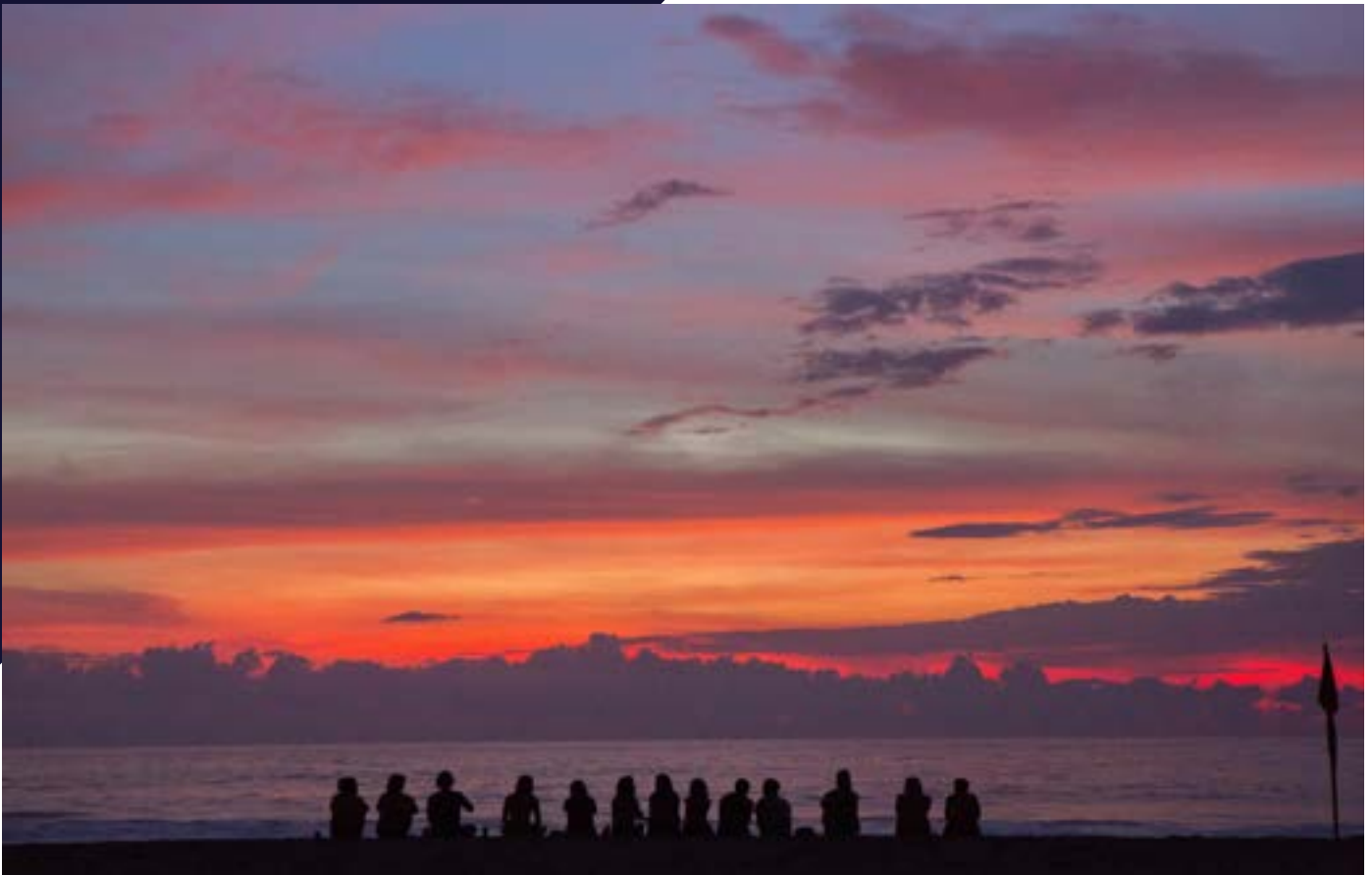
COLLABORATIVE TOOLS GIVE REAL CONTROL

By using collaborative tools that ensure the team thinks about the right factors and works through the right steps in a structured decision-making—or problem-solving or planning—process, you do have control.

You aren't controlling the people, but you are prescribing the process they use to make the decision—and you can review the documented thinking process they used to look for any gaps.

Once people are trained in using collaborative tools, teams can work through decisions pretty quickly. More importantly, they can recognize where they need more information or where they are missing an input.

LET GO OF ALL THE NONSENSE

You'll never truly achieve collaboration by hanging onto directive leadership. And frankly, it just takes too much of your time, collecting all that input, making the decision and explaining it everyone.

Let someone else do that, and then, if you need to make really strategic decisions, assemble a team of your peers who are stakeholders of the decisions, and work the decision-making process with them.

That way, you get to focus on larger organizational issues that can't be made anywhere else instead of doing all that directive decision-making.

And isn't that what you really want as a leader?

OD INNOVATOR

TRUE COLLABORATION
REQUIRES PARTICIPATION BY
ALL TEAM MEMBERS, WHICH
CREATES ENGAGEMENT
IN THE PROCESS
AND, THROUGH THIS
ENGAGEMENT, OWNERSHIP
OF THE RESULTS.

WHAT'S WRONG WITH PROJECT MANAGEMENT — AND WHY IT'S EASIER TO FIX THAN YOU THINK

Mistina Picciano

In today's dynamic world, organizations must continuously adapt to stay relevant, which requires embarking on projects to deliver innovation and improvements. Despite the fact that an entire industry revolves around project management, most organizations lack the tools and skills to succeed at this critical function. An organization's most valuable work happens in projects, yet common problems persist that appear impossible to fix. Project pipelines are overstuffed. Project teams miss deadlines and exceed budgets. Then, once projects are launched, troubleshooting begins, adoption stalls, and the blame game begins.

HOW DID WE GET HERE?

Several factors contribute to this common symptom of organizational dysfunction. First, project management has developed into a separate, specialized function—its very own silo. In addition, traditional project management uses a directive approach to leadership, which is ill-suited for cross-functional endeavors. Finally, without engagement and buy-in from project customers and stakeholders, project solutions continually languish from lack of implementation. These challenges are clear indicators of ineffective and inefficient projects. Your leaders are likely using project management tools and techniques rooted in the traditional project management thinking of yesterday, which won't work in the cross-functional environments of today.

A fundamental goal of many organizational leaders is having a more effective and efficient organization that delivers on strategy, and OD practitioners are in the best position to help the organization do just that. (Hint: The process starts by shifting the approach from managing projects to leading them collaboratively.) This article examines why traditional project management often fails to deliver innovation and execute strategy; it also offers simple suggestions for leading successful projects.

PROJECT MANAGEMENT CHALLENGES

As the body of knowledge surrounding project management expanded, project managers became highly specialized professionals who shared their expertise with other departments as needed. In other words, project management emerged as its own discipline, one that was disconnected from the core business. Carolyn Solares, founder and managing partner of MurphyMerton, witnessed this evolution firsthand—through no fault of its practitioners—and considers it one of the project management industry's biggest challenges. "The project management profession developed its guiding principles and certification program, which probably didn't help," she says. "Those are good resume bullets, but they can block new thinking."

While traditional project management still has its place, many of the tools and techniques in this extensive body of knowledge are unnecessary for most projects. "Traditional project management tools work best when managing complex projects with a predictable outcome, like a mission to Mars or defense contracts," says Paula Martin, CEO and Chief Creative Officer of the Matrix Management Institute (MMI). "But for the overwhelming majority of projects that aren't that complex, you don't need advanced project management tools like earned value analysis or advanced risk assessment."

Another issue with project management comes from reliance on directive leadership. Project managers may collect input from other stakeholders, but they typically develop the project plan and documentation singlehandedly, delegating tasks to a team. Not only does this approach limit an organization's ability to derive the maximum benefit from its collective expertise, but it can also have a detrimental impact on team engagement and adoption.

Martin recalls an engagement in the 1990s where she helped a client re-engineer its procurement process. She worked with the procurement department to revamp its operations, but when it came to implementation, they needed the support of the manufacturing divisions as well. "Long story short, manufacturing didn't want to adopt the system, so they didn't," says Martin. "It sat on a shelf and was a complete waste of time. That was when I realized that you have to deal with all the stakeholders. They have to get on board early in the process." This "aha" moment played a key role in the development of MMI's project leadership training, which teaches leaders how to use a truly collaborative approach to create engagement and ownership among stakeholders.

IMPROVING PROJECT EXECUTION IS A FAR MORE MANAGEABLE GOAL THAN ATTEMPTING TO TRANSFORM THE CULTURE OF AN ENTIRE ORGANIZATION.

HOW TO MOVE FORWARD, STARTING TODAY

Project leadership remains largely misunderstood, yet successful project execution is more critical than ever. The good news is that improving project success doesn't require complex certifications, organizational restructuring or widespread culture change. Instead, simplifying the approach to projects can produce dramatic improvement.

• *Shift from "leader" to "coach."* One small, but critical, shift involves the role of the project leader. With traditional project management, the leader often acts as an administrator, collecting information from the team at each stage of the process to populate various Excel spreadsheets. Such tools might be useful, but they don't necessarily advance the project at hand. Instead of relying on a rigid, linear playbook, project leaders need to build a structure that facilitates teamwork. Establish ground rules to create a safe space where all team members feel valued and respected. Analyze the available tools, and only use the ones that make sense for the current project. Identify how the team will work: How will meetings be run? How will information flow? How will the team make the decision-making process transparent? The faster a project leader can build this foundation, the faster the project will progress.

Early in Solares' career, she spearheaded a project to build a communication platform to promote information sharing across the organization. All members of the small, cross-functional team—comprised of junior to mid-level professionals, including a representative from Human Resources, a technology designer, and internal customers—had received collaborative project leadership training, and she guided the group as a facilitator. Solares left the organization in the middle of the project because of a geographic move. Several months later, the developer called to let her know that the team had successfully launched the project. "The magnitude of that moment has motivated me to this day," she recalls. "I realized that it's not about perfect project management. We had created a safe environment for the team to create, and somebody else stepped into the leadership role after I left. As a leader, you need to ask, can the work survive without you?"

• *Train more people.* This single action will help meet the widespread need for project management skills, typically held by an elite few that operate outside daily business operations. Offering project leadership training to everyone provides a common framework for the project at hand. "You provide basic planning skills that allow people to see how things fit across disciplines," says Solares. "That's the kind of thinking that changes teams. These tools get you up and stumbling. Then, you get better as you use the tools."

Martin worked with a firm that offered optional training on a collaborative project process to new product development teams. Some teams completed the training and began using the methods, while others did not. A year later, senior leaders started to notice a difference in project execution—namely, some were more successful than others. Further investigation revealed that those teams that were using the collaborative project leadership tools were outperforming their peers who had declined the training.

"Projects are complicated," admits Martin, "but not in the way that the project management industry has made them complicated. They're complicated simply because you're doing something you've never done before, so there's a lot of uncertainty." Arming more people with the tools to manage the unknown is a small change that can yield a quantum leap in overall effectiveness.

• *Make the work simpler.* Traditional project management often scopes out massive projects from start to finish, with timelines that can span more than a year. In today's dynamic world, customer appetites and needs change rapidly, and a product designed eighteen months earlier may be obsolete by the time it reaches market. Tackling a huge project can also overwhelm team members, most of whom have additional responsibilities to juggle. In addition, the larger and more complex an undertaking, the greater the potential for errors and delays. As time passes, the original project scope may bear little resemblance to the final deliverables.

Instead of setting teams up for failures and setbacks, shrink the scope into a series of small projects. For example, determine what can be accomplished in six weeks, and plan accordingly. While some large projects need to be mapped out from start to finish, breaking up the work into phases offers the psychological boost of giving teams concrete wins and creates the opportunity to refine subsequent stages, based on the most recent results. "Focus on Stage One," suggests Martin. "Then, as you're completing that, see if you need to re-plan Stage Two."

GET INVOLVED

Are you trying to create organizational change but frustrated by lack of power or influence? If so, you're not alone. "Getting leaders to understand the value of OD" was identified as a top concern at the January 2018 meeting of the Organization Development Network of New York. Consider a different approach. Specifically, set your sights on the project level, where you can generate immediate, tangible results, while gaining actionable intelligence on the organization's needs in this critical competency.

Not only will participating on project teams improve your own project leadership skills—crucial for overseeing successful OD initiatives—but such involvement will also help connect you with the operational side of the business. "Find out where cool work is happening in the organization, and get involved," says Solares. "Experiment. See how your OD expertise and insight actually work in the organization. Projects make a great testing ground since a project is a microcosm of the larger organization."

Moving from the sidelines to the front lines provides practical, hands-on information on how to improve organizational effectiveness. After all, successful project delivery equals strategy execution (provided, of course, the right governance system is in place, addressed in this article on organizational strategy. In addition, project team participation will show colleagues in other departments the value and contributions offered by organizational development. And in the spirit of simplification and sustainability, improving project execution is a far more manageable goal than attempting to transform the culture of an entire organization.

OD INNOVATOR