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ROUND TABLE

CHAPTER 1

ABRAHAM M. GUTSIOGLOU, PH.D.

Chapter 1

The Transformation Model

The Keys to Understanding the Elements

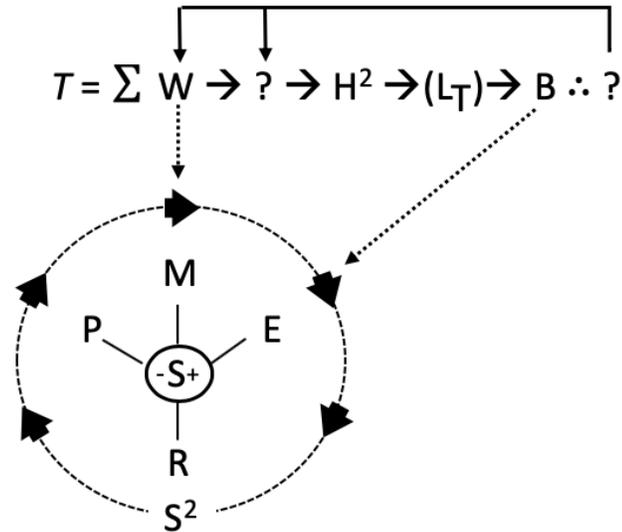


Figure 1.1: The Transformation Model

Let's start by breaking down each element of the transformation model. Trust me, it looks much more complicated than it really is, once you understand the elements and use it a handful of times you won't refer back to it, because it will become a natural part of your approach. After going through the model, we will close off the chapter by putting it all together, so that you get a better idea of how to apply the model.

T stands for "transformation." It's that simple.

\sum represents the summation of your entire approach and work effort.

Basically, everything you do will add up to help you create the transformation. I am in the process of converting this model into an actual formula with numerical weights, but you don't need to worry about a formula for now – that is something that will come out in a future publication. For now, just leverage the elements.

W stands for "what do you want?"

It can be something like, implementing a new business process or launching a new technology that people must adopt. Remember, it can also apply to a personal goal like making a career move, learning skill, or embracing kindness. Yep, kindness.

P stands for “why do you want this?”

Having a clear reason as to why you want this will take you a long way. When things get tough (and they will) this is your North Star – you need to come back to this often and remind yourself why you want this. If you are approaching a problem as the fixer, this should be your first target. Understanding this will help you get things back in order. This is what you will use to get others tethered to your momentum.

H stands for “**H**ow will you know you have it (or getting close)?” and “**H**ow are you keeping track?” It is squared because there are two H’s in the model.

The first piece reminds you that you need to be crystal clear on your objective, while the second piece forces you to put a gauge in place. For example, as a fixer, how will you know things are getting better? Are team members barking at each other less? If so, how are you measuring that? Will staff be more aware of your campaign? If yes, how do you know more people actually know it exists – are they talking about it, are they asking more questions? If you are working on a personal transformation, ask yourself... Am I less stressed? Am I meeting new people or making new friends? You get the idea; you need a clear objective with a clear and tangible measurement.

LT stands for “Length of Time.”

This element of the model will make things much more complicated for you, or fun, depending on your view of the world. It will inform you how (un)realistic your transformational goal is. It is equally important that you don’t fall into the trap that more time means higher chance of being successful. I have found that having too much time is just as bad as having very little or no-time. When things are going haywire, people freak-out and let their emotions get the best of them; when you are brought in to fix a situation, your job is to “stop time”, assess the situation, and begin pulling on the levers in the model to stabilize the situation. The less time you have the harder and more aggressive your tactics need to be. Stay focused.

B stands for “Barriers or Blockers” that will get in your way.

Allow me to strongly emphasize the point that there will be things that will get in the way. Just when you think things are turning around, you can count on something making sure your plan begins to deviate. It’s life! Don’t get discouraged, just rely on your wealth of previous experience to inform the future. If you don’t feel like you have the experience, that’s okay too, because you can use the experience of others in the situation. In the model, this part connects with **S**²(keep reading ☺). As a heads-up, two of the most common things you can count on to get in your way are people (emotions/behaviors/patterns) and processes (ways of doing things or not doing them).

Physical - **M**ental – **E**motional levers you need to pull and apply a negative, neutral, or positive **S**timulus to obtain a specific outcome (**R**esponse). The outcome will inform you how much you need to adjust your strategy. We will see some ideas in detail when we bring the entire model together into a few situations. This piece of the model connects to the personas in Part Two of the book.

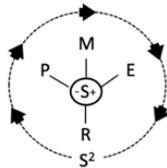


Figure 1.2: The Support System

S² stands for “Support System.”

As you begin to make adjustments and turning the situation around, you will need a system to help you reinforce that changes you have applied. I see this as a person or group of people put in place to keep the momentum going long after you are gone. It can also be a place/environment that is put in place or adjusted to remind people to stay focused and on track. A support system can also be a thing, a symbolic reminder (e.g., a logo, crest, brand, mascot, etc.). A support system is the equivalent of training wheels or guardrails, they are meant to keep momentum on a path. Just like training wheels, a support system is also temporary – you need it long enough to build confidence, trust, and behavioral patterns (i.e., predictable behaviors in ways of working).

∴ stands for “Therefore.”

In the context of this model it is placed as a philosophical question of Now What? Once you have reached your goals, have turned things around, or at least nearing the end-game. You need to ask yourself things like, now what? Do I need to rinse and repeat or should I refresh my methodology or approach and (re)execute? The answer to this question will depend on the whole reason you are doing this anyway. If you were called to fix a situation and you fixed it – that’s it you’re done. If it was tied to a personal goal, you’ll need to reflect on this a bit longer, as it may indicate you have more work to do.

The Transformation Model: Bringing It All Together

Projects go south for many reasons, they can start deteriorating because of unresolved or hidden problems, the project keeps getting stalled, the initiative has a bad reputation, and so on – we can be here a while. Sometimes you are directly involved and you can see it coming, while other times, you are doing your own thing and suddenly get invited to the party. In this section, a scenario is presented and we will use the model in the form of patterned questions to bring it all together.

▶ Business Challenge: Culture Transformation

The Client:

Your client has an aggressive strategic plan to expand its portfolio of services and goods. To do this, the company needs to grow its portfolio through acquisitions. The company has been doing it for years and is good at powering through financial research, negotiations, and legal. However, they failed to consider that acquiring a company also comes with personalities filled with emotions, hopes, and dreams – oh yeah, and baggage. The client believes that leaving the company alone (as if nothing ever happened) means that they would keep performing. Their philosophy is, “If we don’t disturb them, nothing will happen.” The problem with this thinking is that it rarely works. You get called in because over time several of the previously acquired companies begin to act out, underperform, or express feelings of distrust for “corporate.” Your task is to put a strategy in place to turn this around. The client has no plans of slowing down, so they need you to help them sort this out, quickly!

The Transformation Model in Action:

As a “fixer” you’ll need to have the intake conversation with the main person of interest, likely the executive sponsor who has a vested interest in things actually turning around. If you fail to have the conversation with the right person, you’re wasting your time. Let’s go with the assumption that you have the right person.

Applying the model is as simple as getting the answers to these questions from the client.

1. What do you want to accomplish?
2. Why do you want this / why is this important?
3. How will you know we have accomplished this goal (what’s the measure)?
4. How much time do we have?
5. What are things that will get in the way?
1. Are you willing to do what I ask of you and to provide the needed support to get this done?

Here’s a simplified conversation between you and the client.

Note, real conversations will be more complicated, the client may not provide clear answers or just put the entire weight on your shoulders. Over time you will get good at navigating these types of conversations and get the details you need to move forward.

YOU: What do you want to accomplish?

CLIENT: I need company X employees to stop bad mouthing headquarters, I need company Y to stop fighting and sabotaging us as we try to integrate their systems to ours, and finally, I need company Z employees to include others on the deals they are working on. They just all need to get along with us.

YOU: Why do you want this / why is this important?

CLIENT: If they don't get along with us or become inclusive, we can't sell or hit the market the way we planned.

YOU: How will you know we have accomplished this goal (what's the measure)?

CLIENT: Well, to start people will stop bad-mouthing each other, we will actually show up to clients as a unified front, and we will win the deals. Our deal win-rates should be increasing not staying flat.

YOU: How much time do we have?

CLIENT: YESTERDAY! We will keep expanding our portfolio and I don't have time to babysit them because they don't get along.

YOU: What are things that will get in the way?

CLIENT: I feel like the middle level management and some of the executives will make it hard for you to get this going. They have egos and pride that stops them from creating synergies.

YOU: I will need you to do things or be places. In fact, this will cost you: time, money, resources (things and people), and maybe even your reputation. Are you willing to do what is needed to get this done?

CLIENT: YES! (Note, be cautious here, they often say yes, but when things get worse, they will transfer the pressure over to you).

Chapter One

Summary

In this chapter, you learned that projects go on a declining path and fail many reasons, most of them fall apart because of people related problems. You can expect to see things like, unresolved conflicts, hidden agendas, insecurities, fears, and so on.

There will be times when you are part of a project in the early phases and you will see first-hand where the issue comes from, then other times, you are going to be brought in as an outsider to turn things around. You will be asked to “fix” a failing situation.

As a “fixer” it is helpful to have a model to work with, something to get you thinking about key elements to leverage through the process.

This chapter introduced you to the Transformation Model, a mental model that guides you through a process of getting situations back on track.

Applying the model is as simple as getting the answers to these questions:

1. What do you want to accomplish?
2. Why do you want this / why is this important?
3. How will you know we have accomplished this goal (what’s the measure)?
4. How much time do we have?
5. What are things that will get in the way?
6. Are you willing to do what I ask of you and to provide me with the support I need to get this done?

As you learn to use the model, you will also learn to challenge your way of thinking by seeing the world through the lens of different professions. Often times, over the course of a single project you will need to leverage the thinking skills of other professions.

The rest of this book will introduce you to various professions and ways of thinking like them, so that you can revitalize a failing situation.