

Task Sets for the Emergent Approach

Staffing Your Framework Design Program

For large, multifaceted strategy endeavors with diverse, spread-out organizations, you may need several unique roles and teams. In small endeavors, team members will wear multiple hats. Where strategy development is embedded into the fabric of the organization and not an event (the nirvana case), some or all people will fill roles as part of their normal assignments. Staffing may change as you learn people's skills.

This section describes options for roles and teams and offers guidelines for what to look for in participants, including the use of consultants. If you do not have the authority to choose, maybe you can influence team composition. Included is the recommendation to extend the design process in time where feasible to enable key people to participate (Chapter 11).

Roles and Teams

There should always be tension and a trade-off between the benefits of inclusion and the complications of additional participants. Inclusion supplies more diverse experience, more workers, should lead to better decisions,¹ and gives more people the chance for internalization and emotional ownership. On the downside of inclusion, it is hard to design by committee; an open and honest dialog may be difficult, and the larger the group, the harder it may be, depending on the culture of the organization. Though online conferencing helps, scheduling and sheer availability become a challenge, which is more difficult still if people are in different parts of the globe. The other downside is that more people involved in an endeavor, the less any individual may feel accountable. The staffing techniques presented here suggest ways to find a good balance between inclusion and smallness. When in doubt, start small and add more people as needed.

¹ G. Paul and S. Kovvali. July 01, 2018. "The Other Diversity Dividend," *Harvard Business Review*.

Sponsor

The person you report to or take direction from may be the “boss” or the sponsor. This person is likely the controller of resources and someone who has authority or strong influence in the system to be worked on. If you are from outside the organization and serving as a consultant, this person may be your client. Usually, this person has a vested interest in the success of the program, but if you are driving it, they may not.

The sponsor role may be a steering team that likely includes the boss, from which you can gain the buy-in from decision-makers and advice from people with potentially broad, diverse experience. The steering team can also simply be a de facto part of the organization, a business leadership team, for instance. If you can influence, limit the steering team to two or three people. Members of large steering teams (like boards sometimes?) may feel safe making decisions without investing time to learn about the endeavor.

Program Participants

The *design team* is your core working team. By having, say, two to five key members possibly representing the various functions of the organization involved (e.g., sales, R&D, product management, supply chain), you will have more experience and awareness of what’s going on throughout the organization. If your endeavor is large, and the organization is large, more diverse, and/or geographically separated, you might consider adding:

Extended design team. This team includes people you consider important for their knowledge, their position, and in whom you wish to instill a sense of ownership. An extended design team will meet and work less frequently than the core design team and should especially include people in the organization who will be a part of implementation. In larger endeavors, where there are multiple functions spread throughout the world, this team could be 20 or more people. The extended team may be only occasionally brought together as a whole, but they can be kept in the loop, informed, and ask for feedback often.

Ad Hoc teams. These teams are commissioned to solve a specific problem, answer a question, or evaluate, assess, or draft an aspect of the design. You can form these teams from people already inside the project or from outside. Ad hoc teams are efficient, use people's strengths, honor people's expertise, and test people's ability and leadership. Members of the extended design team may be good candidates for ad hoc assignments.

The percentage of time team members give to the program depends on the scope of the endeavor and the degree to which you extend the process in time. However, expectations and commitments should be clear and required.

Facilitator

The *facilitator*, sometimes called a *process leader*, gives technical guidance and training on the framework design approach to individuals and teams, leads or assists in running meetings and interactions (whether in person or on video), and assists with live capture of group work. The facilitator must be respected and supported by the program leader and sponsor. Beyond technical knowledge of the emergent approach, the facilitator should have the skills (and confidence!) to:

- Keep people engaged and work through pain
- Help the team get unstuck
- Pick up vibrations and undercurrents of what people are thinking
- See through seduction by easy answers
- Manage disrupters
- Keep their own prejudices at bay
- Stop at any time

Neutrality—controlling prejudices and biases—is particularly important for the facilitator. This goes beyond content. It may be hard for a facilitator to stay neutral if they favor a person who likes their approach or likes them personally. All leaders are faced with this challenge.

It may be best for the facilitator to be an outsider. You, as program leader, or another team member, can be the facilitator, especially in a small endeavor, but this is tricky. It's hard for a leader or invested team member to be neutral.

If you must use a facilitator who is an insider, be cautious of “playing it safe” by choosing someone who ruffles no feathers. Even-tempered people are great, but not when they have a personality that aims to keep everyone happy, or that lacks the sensitivity to see and feel the subtle differences in what people are saying.

Individual Team Members

Everyone wants to work with knowledgeable, thoughtful, and helpful people who can create brilliant designs quickly. Consider the following when staffing your teams (again, assuming you have the right to choose):

- Will they contribute diversity of thought, style, unique skills, experience, and a network of connections? Lafley and Martin recommend having at least one team member who was not part of designing the current state.²
- Are they on the “front line,” directly contacting customers, constituents, competitors, or supervising production?
- Are they from other parts of the company that might be impacted by your framework?
- Will they be part of implementation, either as part of a special team or as part of the line organization? People who are part of both design and implementation give valuable continuity and have valuable buy-in. Including these people is an important reason to extend in time (Chapter 11).
- Do they represent an important functional group or organization? Does that group need to buy into the approach for it to succeed? Are they connected to the bottleneck or important to busting it?
- Do they control important resources?
- Are they at the right level of the organization? A CEO working on a major corporate change may or may not benefit from participation by accountants or fork-lift operators.

² Alan G Lafley et al. 2012. “Bringing Science to the Art of Strategy,” *Harvard Business Review* 90, no. 9, pp. 3–12.

- Will they do work? In meetings and outside? Multitasking and occasionally saying something in meetings isn't much help. Doing offline work that will be presented to and scrutinized by the team requires a different level of effort.
- Will they be so pliant that they go with the flow on everything and suck-up to the leaders? Or the opposite, will they be too independent, unable to follow the leader, and potentially subvert the process?

The *Three Ws* capture several of these criteria—will a person bring **Work**, **Wisdom**, or **Wealth** to the team? (Other criteria are captured by the four **Ds**: will people be **Dunces**, **Disrupters**, **Dilettantes**, or **Dorks**.)

Geniuses and Jerks

Some team members are sure they have everything already figured out. Sometimes, instead of using the process to get their ideas burned into the system, they subvert the process with anger, cynicism, or passive-aggressive stonewalling. Some people insist on being the smartest in the room. And sometimes, you may really be dealing with a “genius” (or they may be encouraged to believe themselves a genius because the organization is analytically weak or nonconfrontational).

You must decide whether to coddle and bend to such people. Will they alienate everyone else? Do they have the ear of a leader who can kill your process (or your career)? Not all brilliant people are easy or fun to work with. Of course, if someone can create excellent frameworks in their head and can get people throughout the organization to follow them with great energy, no matter what their style, then stop reading this book and give that person *carte blanche* and a raise.

Whereas it's easy to see who the jerks are, it is sometimes the best-behaved people that are the most useless for making change. People who won't ruffle feathers or who smile and gently nod their heads to everything that's said are not helpful.

Using Consultants

Consultants can be great for:

- Bringing specialized domain knowledge, specialized techniques and research, or theories and data on how things are in the world.
- Providing high-quality hands and skills when you simply do not have enough people, or when in crisis.
- Lending credibility for your ideas by supporting them. (This may be good or bad.)
- Helping you discover or face truths that you could not on your own, assuming they have techniques and skills to do so.

Consultants are not as good for giving you the strategy (i.e., the framework) answer—doing strategy *for* you, or worse, doing it *to* you,³ especially in a quick linear sequential program where you are perhaps left with a massive PowerPoint deck. Even if the consultant has insight that you do not have, it may be useless if your organization does not have the ability to grasp it. Just taking the superficialities and the slogans of consultant insights does damage, not good.

Don't put your consultants into this situation. If the company is committed to your endeavor, and organizational capability matters, then take responsibility for strategy yourself, using consultants to guide and do it *with* you, versus consultants doing the strategy with the company's help.

Hiring consultants for fast action can be effective when the goal is tearing something down (the proverbial hatchet man). Tearing down, “revolutionary destruction” as described in Chapter 2, is always easier than evolving something new—especially *revolutionary* creation.

³ Rosabeth Moss Kanter said, “Change is disturbing when it is done to us, exhilarating when it is done by us.”

Three Challenges for Process Leaders and Facilitators

Be sure that the sponsor or client who has engaged you really has the buy-in of the organization. This doesn't mean quitting if they don't; it means figuring out why they don't and what, if anything, can be done.

Second, the client may not be a good judge of the approach, or of you. If you are skilled and the program is a success, people should think they did it themselves. In many ways, they did, but only because you gave them the underlying discipline. Developing people is about the best a facilitator can do for a client. Unfortunately, if the boss hears you were not important because you were a teacher and not a doer, it might not help your (internal or external) consulting practice. You can encourage people to see and understand your role in the process, but sometimes all you can do is suck it up.

Third, when using the emergent approach, the client may believe nothing is getting done until the results emerge. You may hear statements like, "We've met seven times, but today is the first day we got something done." This is like spending months designing a building, locating a site, securing funding and permits, and buying materials, and when finally starting construction, someone says, "Hey, you're finally getting some work done."

Being sensitive to these issues will help you better manage expectations.