

THE MACRIS GROUP

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From Dean's Desk:



Prologue

What you can't measure you can't improve has been a mantra for improvement initiatives for years. Several years ago, we wrote with the contributions from our friend Tony Aмео about performance measures. Another aspect of improvement is benchmarking. We are firm believers in benchmarking as ways of externally checking an organization. What do others do, how do they do them and what can we borrow from that knowledge to help improve the companies we consult with. We like to think we practice what we preach, but

benchmarking a small consultancy can be a difficult endeavor (perhaps a topic for a future issue). However, we are continually on the lookout for lessons learned; when we saw Joe Bockerstette's post on LinkedIn titled Ten Lessons Learned from Thirty-Five Years in Consulting; it hit home. We contacted Joe and asked if we could use his lessons learned as a backdrop for our 2017 UPDATE series and he graciously agreed. These lessons learned dovetail nicely into our last issue.



Lessons Learned for Better Leaders and Outcomes

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Introduction

Welcome to our 2017 UPDATE series. This year we are focusing on an article/post we read that delineated Ten Lessons Learned from Thirty-Five Years in Consulting written by Joe Bockerstette who is a principal at Business Enterprise Mapping. While a relatively short post, it was quite powerful for us because it validated many of our observations and topics we have written about. Joe's ten lessons seemed to form a nice backdrop for our 2017 articles. This being our first article, we will introduce the 10 lessons and then drill down into the first two.

Often we face the question: why do we do what we do, which is a very good question. We can tell you what we do and how we do it, but answering the why is a challenge. One answer is independence. We believe we offer a very personal level of professional service that does not carry corporate baggage or any ulterior motives. We believe we can be clean and honest with our clients and always reserve the right to walk away if we feel we pressured to compromise our values. Having been in this business for over 30 years we have the privilege of working with great people and companies, gaining a breath of experience and fortunately a track-record of successes; but benchmarking can be difficult.

While we believe we are doing fine based on the longevity we have with our clients, as well as a healthy new client influx, it is nice to get an external perspective of how are we doing. Do our observations make sense beyond our sphere? When we draft our newsletters, we attempt to reach beyond the traditional, challenging ideas, thoughts and practices. Again, benchmarking is difficult. So, when we see something validating our experience, observations and beliefs, we get excited. Our purpose in this 2017 series of articles will be not to extol the virtues of consulting but to present important lessons on effective leadership.

Ten Lessons

Joe's post on LinkedIn caught our attention because the ten lessons learned were spot on and validate our observations from years of consulting. They are:

1. Success depends far more on the client than the consultant.
2. Figuring out what's wrong isn't that hard.
3. Leaders don't know how work actually gets done.
4. Leaders and managers also don't understand process.

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5. Companies measure what's easy, not what's important.
6. Change is simple, just not easy.
7. Leaders would rather hire superstars to solve problems than solve problems.
8. Industry experience is overrated.
9. Corporate politics stops improvements.
10. Great clients have a will that delivers successful outcomes.

Addressing all ten in one article is not realistic for our UPDATE newsletter, so we are going to address a few in each of our four issues for 2017 from our perspective. Our first issue focuses on # 1 - Success depends far more on the client than the consultant; and #2 - Figuring out what's wrong isn't that hard.

In past Update articles, we have discussed how improvement efforts depend on a true and active commitment at the top of an organization and how active commitment sets the tone for participation by the rest of the organization. Let's look at the first of these lessons:

1 - Success depends far more on the client than the consultant

When we started consulting, marketing was a necessary endeavor but not something we were particularly adept at. We felt that our job was to sell ourselves, then our consulting approach. Fortunately, most engagements were successful, but not all. In trying to understand the successful and the not so successful engagements, we saw common threads realizing there were common characteristics of our clients that affected the success of the engagement. We realized in addition to marketing ourselves we had to assess the potential client to ensure they were the right people to drive improvements and the organization's success. The criteria we developed for our ideal client included:

- All aggressive - These individuals were willing and able to take charge and make things happen. They were committed to the organization and wanting to make changes happen so the organization would thrive.
- Variety of levels of Supervision - We found that our success was not at any particular level within the organization. We found we were successful at multiple

levels, provided these individuals possessed these characteristics.

- Not risk adverse - Willing to "upset the apple cart" to gain improvement. In our case, being a small firm carried risks, but one they were willing to accept to achieve organizational success. There have been times when we experienced challenges because we did not have deep pockets or bench strength, or the panache of a larger more recognizable firm. Our ideal clients focused on outcomes rather than perception.
- They can "handle the system" - These individuals could maneuver through their bureaucracies to move the agenda forward. They could sell the improvements to those below and above them in the organization.

Target individuals vs. Topics - Jim Collins hit this characteristic when he stated in his book Good to Great, get the right people on the bus and they will be able to take you anywhere you need to go. Our Ideal Clients focused on getting the right people involved in the change effort both internally and externally.

Not everything went smoothly. Finding the Ideal Client was and is a challenge. In businesses and or companies where we had connections we were able to do some research in advance so we got as close to the person or people we needed to, but that certainly had limitations. So in order to qualify or get closer to the ideal person we had to do a bit more work. In these cases, we applied, selectively, the following criteria:

- Who is the 'right' person - It takes work to identify the 'right' person and it takes more work to ensure that person would be assigned the lead for the consulting engagement.
- Do you use outside services - Is there an aversion to using outside services. If so, what can we bring to the table to show how an independent approach is beneficial?
- What current ongoing project - Learning what work or endeavors were considered important helped us focus either our approach.
- What current anticipated projects/need - How did what we were proposing integrate with other planned needs?
- What is the budget cycle and \$ sign-off authority - This item is keenly important. A few examples: If we were dealing with a senior executive, budget cycles and sign-

off authority was a moot point. If they wanted something done or believed in a particular endeavor, it happened. In a more planned context of projects, budget cycles and sign-off authority became important. An Ideal Client could make things happen. Without this authority, all the good intentions meant nothing.

In contrast, engagements that did not fulfill our criteria resulted in less than ideal conclusions, as stated above; fortunately, those were few and declining over the years as we refined our process. Engagements where our clients and the people we worked with met our criteria were interesting, engaging and beneficial for both the client and us.

Why are we discussing the marketing of consulting work? Because these characteristics apply to successful managers and provide strong leadership within any organization. An organization succeeds because of leadership. We always try to focus our Update articles on leadership. The 10 Lessons that are providing the backdrop to our 2017 Update articles are lessons not just for consulting but also for building and growing successful organizations.

#2 – Figuring out what’s wrong isn’t that hard.

Several years ago, we wrote an article that likened figuring out what is wrong within an organization as misplaced pieces of a puzzle rather than mysteries. In reality, the challenges facing businesses today are not mysteries. We believe success in addressing the challenges comes from a clear understanding of the issues. The issues and many of the answers reside within the organization and are identifiable. Therefore, rather than mysteries, which contain unknown components, organiza-



tions face misplaced puzzle pieces. The pieces are there; what we do, with our clients, is to sort and reshape the pieces so they all fit together.

Frequently managers think they understand what is wrong in their organization. Their definition of a problem typically is the primary reason behind our engagement. Sometimes these definitions are accurate, but sometimes leaders are not close to defining the real problems. One of our

challenges and a key to the success of the engagement is a clear definition of the problem. As we will address in our next article, leaders don’t always know how work gets done. To gain a clear and true understanding; those who “are in the trenches” must be involved not just with the improvements and changes, but first with helping to define what is wrong. These “trench dwellers” may be wrench turners, accountants, first level supervisors, customer service folks on the phone with the customers, etc.

Achieving this understanding involves tapping into the best thinking of those who confront these issues and then designing the necessary changes. In order to achieve this insight, it is important to create both the environment and framework to identify and sort out the issues, assist organizations regain a sense of purpose and focus, establish an overall improvement design, create real and achievable improvement initiatives and establish the whole picture of its existence. We help organizations shape or re-shape their pieces to solve the puzzle, facilitating tangible outcomes while institutionalizing cultural change.

As noted, rarely is it rocket science to figure out what is wrong in an organization. It takes involvement at all levels and more importantly listening on the part of the leader. After listening, the leader must separate the facts from the “venting” and pull those facts together into a clear and accurate problem definition. As consultants, we work hard with our clients to gain a clear problem definition that sets the stage to move forward with focused and effective resolution initiatives.

Conclusion

When we first read Joe Bockerstette’s Ten Lessons Learned, we thought they formed a great backdrop for us to provide our perspective on the same lessons, interjecting our real world experiences in the context of leadership. Another goal for this year is to abbreviate the length of our articles. Keeping them shorter and hitting the high points. Therefore, we will address the next few Lessons in our next Update issue. Keep in mind we feel these are key leadership issues and many that we have previously addressed in past Update articles. We feel these are important issues in building strong and effective leaders at all levels of an organization.

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