

**The  
EDUCATIONAL  
CASE  
for  
PRACADEMIA**

## A New Paradigm for Leadership Development

*Why Leadership Training Has Failed  
and How to Fix It*

#3 in a Six-Part Series

### *Transformative Action Learning Engagement*



*By Robert Porter Lynch, Ronald Steffel, and Joseph Scali*

Version 2.0 August 2020

### Purpose

Leadership Development has not fulfilled its promise to produce great leaders. What's more, business executives are dissatisfied with the results of Executive Education. The problem is compounded by the rapid change in the structure of commerce – a genuine paradigm shift.

Leadership Development is needed now  
more now than ever.



This Six-Part Series examines the problems and obstacles and what can be done to invigorate the Leadership Development process, creating a Game Changer Strategy to shift the paradigm from Executive Education/Development to Advanced Organization Transformation:

- #1 – The Shocking Truth: *The Massive Failure of Leadership Development*
- #2 – What's Wrong: *Three Major Flaws in Leadership Development*
- #3 – New Paradigm in Executive Education: *Transformative Action Learning Engagement*
- #4 – Systems Architecture: *Reframing Organization Transformation*
- #5 – Designing the Future: *Creating Breakthroughs & Shifting Paradigms*
- #6 – Long Term Shift Required: *"Colliberative" Education & the 12 Concordances*

---

**DRAFT ONLY -- NOT For Release!**

### Executive Summary

Business executives are not satisfied with the results being produced by Executive Education, which has failed to live up to the expectation it will produce leaders who can transform organizations.

Chief Learning Officers (CLOs), are being challenged to find concrete justification for their training expenses. A recent survey found that only a third of line managers felt “they have become much more effective after taking part in development programs.” Other critics claim that only little more than 10% of the \$200 billion training and development expenditures produce results of any real value because people soon revert to their old ways of doing things.

It's time to reexamine Leadership Development process from top to bottom, from inside to outside, and bottoms up.

In White Paper #2, we looked at the Three Major Flaws in Executive Education that has caused failures, false starts, and faulty execution.

In this White Paper we address the New Paradigm for Leadership Development based on application of the Transformative Action Learning Engagement strategy. We outline:

- A Better Model for Adult Learning
  - Eight Guiding Principles for Transformative Learning
- How Transformative Leadership must be guided by Paradigm Shifting dynamics
- Creating the Stakeholder Strategic Alliance for the Transformative Action Learning Engagement
- How Corporate Clients should Prepare for Transformative Action Learning
  - Aligning Stakeholder Interests
  - Key Questions that need to be Addressed
  - Building Action Learning Teams
  - Action Learning Management Requirements
- How to Ensure the Impact of Action Learning
  - Preconditions for Success
  - Workshop Methodology
  - Understanding & Analyzing the Organizational System & Processes

Transformational Leadership is actually a *paradigm shift*, but virtually no one is treating it in the systematic way that causes such a shift to be sustainable.

We can double the impact at half the cost.



## Contents

<b>Executive Summary .....</b>	<b>2</b>
The Collaborative Advantage .....	4
<b>Prelude: The Need for a Paradigm Shift in Leadership Development .....</b>	<b>5</b>
Compelling Need for New Leadership .....	5
<b>Part One: A New Paradigm for the Way Adults Learn .....</b>	<b>6</b>
Pedagogy versus Andragogy Learning Models .....	6
The Value of Pracademics .....	6
<b>Part Two: Key Guidelines of Transformational Learning .....</b>	<b>7</b>
Transformation is a Paradigm Shift .....	7
Eight Guiding Principles for Successful Transformative Adult Learning .....	7
1. Compelling Rationale/Value: .....	8
Value Proposition.....	8
Metrics & the Threshold of Change .....	8
2. Question-Centered Learning.....	8
Corollary: Problem Solving Capability .....	9
Corollary: Visionary Progression .....	9
3. Immediacy & Application:.....	9
4. Team Learning.....	10
Corollary: Synergy is the Deepest Yearning of the Soul.....	10
5. People Support What They Help Create.....	11
Corollary: Finding Meaning & Purpose .....	11
6. Five-Step “Learning Loop” for Transformational Paradigm Shifting.....	12
7. Driven to Learn.....	14
8. Architecture & Mental Modeling.....	17
Pattern Recognition .....	17
Scrambling the Brain .....	17
Simplicity .....	18
Mind MAAPPSS .....	19
<b>Part Three: Creating the Stakeholder Strategic Alliance .....</b>	<b>20</b>
Aligning Stakeholder Interests .....	20
Key Questions Clients Should Be Asking .....	21
Five Key Factors for Success .....	21
Building High Performance Action Learning Experiences.....	22
What Makes a Successful Action Learning Experience.....	22
Working Together .....	23
Action Learning Management Requirements .....	24
1. Executive Sponsor -- Gaining Top Rank Support .....	24
2. Program Champions to Advocate for Collaborative Excellence .....	25
3. Program Project Manager .....	26
4. Program Coach/ Facilitator.....	26
5. Participant Practitioner Teams .....	27

# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

### Part Four: Action-Learning Structure --Making Transformation Stick.....29

Preconditions for Success .....	29
Getting Prepared for the Collaborative Excellence Program .....	29
Workshop Methodology .....	32
Understanding and Analyzing the System and the Process .....	32

### Appendix ONE: Sample Course Structure .....34

101 Basic Level Program Content: .....	34
Understanding Fundamentals of Collaborative Excellence.....	34
Multiple Versions Available .....	35
Program Roll-out Map.....	36
Delivery Formats .....	36
Executive Champions, Programmatic Approach & Critical Mass .....	36
201 Advanced Level Program Content: .....	37
Strategic Leadership Professionalism .....	37
301 Mastery Level -- Focused Applications for Integration & Transformation .....	38

### Appendix Two – Difference Between Workshops & Seminars .....40

Workshops versus Seminars.....	40
--------------------------------	----

#### *The Collaborative Advantage*

For years our team has been involved in actually implementing collaborative projects and alliances, as well as studying them to glean the factors for success as well as the comparative advantages.

While our team is not alone engaging in these studies, our conclusions follow the same trend, time and time again: *collaboration* beats its *transactional* and *adversarial* counter-parts by 25% or more. The ability to create a 25% competitive advantage showed up across industries, cultures, and a wide variety of organizations, including in business: Airlines, Automotive, Insurance, Pharmaceuticals, Steel, and many others. In case after case, the level of trust impacted the productivity of collaboration and innovation.





## Prelude: The Need for a Paradigm Shift in Leadership Development

In White Paper #1, we provided compelling evidence that leadership development has failed miserably. White Paper #2 examined the three major flaws in Executive Education, including the lack of a systems design architecture for collaborative leadership, the short-comings of academia, and the disconnection between stakeholders in the leadership development value chain. In the White Papers that follow, we will propose solutions to pave the road to a bold new future.

This White Paper provides a strategic methodology to address the major educational flaws.

### *Compelling Need for New Leadership*

In today's fast moving, rapidly changing world, where uncertainty, complexity, and ambiguity reigns, there is a compelling requirement a leadership development. *Collaborative Leadership* is the form of the future that produces real synergies, where people are excited to interact in teams, to innovate and add value every day – all the time finding meaning and purpose in both the work itself and the people we work with.

Organizational leaders must direct this unfolding -- making people aware of the design architecture that needs to be implemented, giving people the strategies, mind-sets and tool-sets for building innovative and adaptive organizations, creating the cultures that reinforce collaborative performance, and rewarding people for teamwork and alliance building.

Front line leaders are faced with a monumental task of transforming their organizations into agile, innovative, value-creators. To do this, they must bolster their ability to tap into the huge potential in their workforce. This is done by better understanding how to use *culture as a strategic lever*, where trust and teamwork are the central organizing principles. It's a paradigm shift requiring new mind-sets, skill-sets, tool-sets, and something that goes unheralded: "systems-sets," the design architectures that support a new paradigm.

---

*Transformation has been more an aspiration than a reality.*

*Transformative Action Learning Engagement is the  
strategy & methodology that empowers and enables  
Collaborative Excellence in organizations*

---

Business leaders also have not been happy with the results of transformation efforts from Executive Education, which has produced a less-than-satisfactory return on investment. Most people attending programs get reinjected back into an organizational system that simply does not support new ideas or operations.

---

*We are committed to ensure close integration between corporate initiatives and  
the learning process through Transformative Action Learning Engagement.*

---



---

## *#3 Transformative Action-Learning Engagement*

---

### **Part One: A New Paradigm for the Way Adults Learn**

Before we address the Transformative Action Learning Engagement in Part Two (below) we think it's important for us to share how we think about the way adults learn. The Eight Guidelines (below) are an evolution and updating of the Andragogy (adult learning) Principles that evolved from the work of Malcolm Knowles and David Kolb<sup>1</sup> fifty years ago.

In White Paper #2 we examined the difference between pedagogy (child learning) compared with andragogy (adult learning). Typically adult learning (also known as “active” learning, “experiential” learning, “participative” learning, “collaborative” learning, or “problem-based” learning) is differentiated from “passive” learning where the student simply listens, takes notes, absorbs knowledge, or observes.

#### *Pedagogy versus Andragogy Learning Models*

Because university (graduate & doctoral level) education evolved first from delivering undergraduate college degrees, historically the idea of learning was based on the knowledgeable professor who would “teach young students what they didn’t (and should) know.” This legacy learning model (called “pedagogy,” which means child learning) has hampered Executive Education, and is becoming a severe impediment moving into the future.

The pedagogical model positions the professor as the massive fountain of research-based knowledge. The professor’s role is to pour his brain into the student’s brains in a logical, sequential manner, thus instructing students in the realms the professor deems important.

When universities decided bolster their Graduate programs by adding Executive Education as part of the life-long learning repertoire, all-too-often the professorial model was carried along with it. The assumption was that Executive Education was an extension of the Graduate School programs.

This assumption was wrong. After adult learners enter the real world, their learning needs and modes become significantly different. The strategies and methodologies of adult learning have not been fully embraced by university-based Executive Education. The major obstacle to making the shift is that it requires a significant retooling and restructuring of education, including how professors are selected, credentialed, and advanced in their careers.

#### *The Value of Pracademics*

Experience in Executive Education has demonstrated that the best teachers of leadership in adult learning environments are actually not professors at all, but “pracademics” – senior leaders who have, in the latter part of their careers, turned to teaching, often combined with writing.

They bring more than knowledge; they are living case studies, and are usually committed to empowering others, which is what they did in their careers in business. Pracademics are hybrids between business and academia that bring the best of both worlds to the adult learning experience. The important difference is that academics focus on teaching individuals, pracademics aim at transforming organizations via teams.

---

<sup>1</sup> The lead author of this article trained under Dave Kolb in 1973. He was a pioneer thought leader in “experiential” learning.





## Part Two: Key Guidelines of Transformational Learning

### *Transformation is a Paradigm Shift*

Repeatedly, Executive Education promotes the importance of acquiring and updating skills to meet the urgent needs of a rapidly evolving work world.

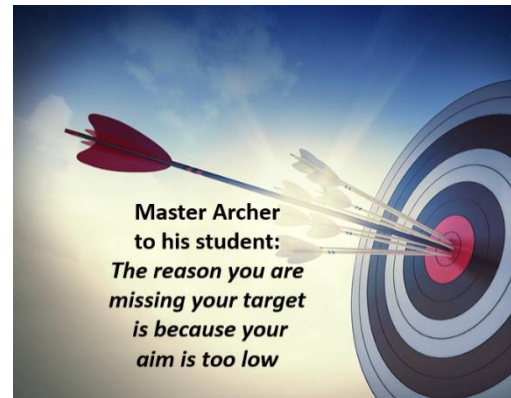
While this makes good ad-copy, it misses the mark by a wide margin. Companies are expecting that leadership development will produce influencers who can *transform* their organizations.

Here's the disconnect: *Transformation* is, by its nature, a *Paradigm Shift*. However, we never seem to hear these two-phenomenon connected as two sides of the same coin. Most leadership development is based on old paradigms, neglecting the nature of how real transformational change occurs. Just improving skills is simply insufficient.

Ever since the Greeks, leaders and educators have known that great learning emerges when the *mind* and *spirit* are engaged, when people integrate *knowledge* and *desire*, when what's *best* merges with what's *good*, when *concepts* become *measurable processes*, when *mindsets* align with *skillsets*.

Paradigm shifts are the hardest to design and even after they are designed, many people can't even see the structure of the new paradigm until it's too late, because they are so invested in the old paradigm. That's why often it takes the younger generation to engage in the shift; they are less encumbered by the culture created by the older generation.

Creating a Paradigm Shift means seeing today's world through a different lens. Paradigm shifts require a multi-level change, otherwise the shift won't stick.



## Eight Guiding Principles for Successful Transformative Adult Learning

What makes a successful learning experience? Our team has engaged with tens of thousands of senior leaders and managers over the last forty years. We have had over a century of experience in Executive Development as Pracademics – successful Practitioners who have, later in their careers, turned to the academic community to teach other emerging and existing leaders.

During this time we have delivered thousands of days of programs, observed thousands of senior and emerging leaders grapple with problems, received feedback about what was effective, interacted with other Pracademics, and read hundreds of books. Several of our team received our doctorate degrees, others have written books and published scores of articles about what we learned. We have consolidated some of that learning into 10 Guiding Principles about what works and how people learn.

### *#3 Transformative Action-Learning Engagement*

#### 1. Compelling Rationale/Value:

Adults need to know the reason for learning something. Experience can be both an asset and a liability, if prior knowledge is inaccurate, incomplete, or naive, it can interfere with or distort the integration of incoming information.

The rational circuits of a leader's brain need to a strong justification for taking a stand, leading an initiative, and convincing people to change.

##### *Value Proposition*

This requires a very clear Value Proposition for the learning experience. A Value Proposition is both an expectation and an aspiration. It is a vision made measurable – a commitment to having the learner be able to increase their performance by some specified amount of gain.

##### *Metrics & the Threshold of Change*

Everyone makes a mental input-output calculation: will the energy/difficulty put into the effort be worth the outcome or benefit?

For example, if I change my diet, how many pounds will I lose? or how many more years will I live?

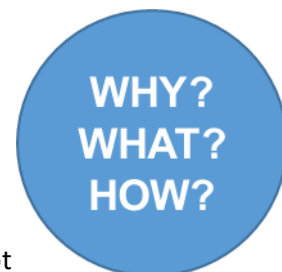
Fuzzy promises – such as “you’ll live longer” – have little value compared to clear metrics, such as “you will add 5 years to your life if you quit smoking.”

Adults are motivated by what they perceive as value for themselves, when they can have a role in directing their own learning and have a strong inner and excited motivation to develop a new skill or acquire a particular type of knowledge, this sustains learning. Adults learn by taking responsibility by the value and need of content they have to understand and the particular goals it will achieve. Being in an inviting, collaborative and networking environment as an active participant in the learning process makes it more than efficient, people sense they have value and create value for others.

#### 2. Question-Centered Learning

Humans are learning machines – it is a natural process that we all observe in children. We are naturally inquisitive. Just watch any three year old get into everything.

Questions are at the heart of adult learning. People want to know WHY? Why is this important? Why does something happen? Why can't I do something? Why does something work sometimes but not others? And so forth. Then they want to know WHAT? And then HOW?







In many ways the level of interest in questions will separate Leaders from Managers from Technicians. The latter will focus on HOW? Managers on WHAT? And the best leaders will integrate all three levels: WHY? WHAT? HOW?

In framing learning experiences, most problems or opportunities are easily framed around a question. In this sense, a question is like an “itch” that will need scratching. Most people are not at ease until they dig into the question and start finding solutions. Be careful to formulate questions that are answerable, even if it takes work.

## *Corollary: Problem Solving Capability*

The formulation of a question is closely connected to how adults feel duty-bound to solve problems.

This is often referred to as the “pain” side of the making progress. Every leader has something that keeps them up at night; that they worry about; that they know can backfire or misfire. Adults want to learn things that will be a realistic solution to their problem.

To create a more meaningful learning engagement, participants will start by posing realistic questions to solve problems, creating space to generate innovative joint solutions – demonstrating that using one’s imagination is an integral part of real learning.

---

*The best learning programs are designed to give adults the greatest advantage by being fully immersed in the action-learning loop.*

---

## *Corollary: Visionary Progression*

<sup>2</sup>“Where there is no vision, the people perish” is ancient wisdom. All great leaders have some vision, goal, strategy, or opportunity they wish to take advantage of. This is often referred to as the “gain.”

Great learning experiences will demonstrate a clear *progression* from the current state to a future state where the vision, mission, or goal is achieved.

## **3. Immediacy & Application:**

Adults are most interested in learning things that have immediate relevance to their work and/or personal lives. Adults want ideas, strategies, practices, insights, and information that will help them improve their situation.

They do not want to be told what to do, they want it to unfold as a product of their own insight and logical understanding. They want to feel confident they can evaluate what helps and what doesn't. They want to choose options based on their individual needs and the meaningful impact a learning engagement could provide.

---

<sup>2</sup> From the Book of Proverbs in the Judaic Old Testament

# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

Learning needs to be connected to something in their experience. Adults are practical in their approach to learning; they want to know, "How is this going to help me right now? – Is it relevant? Does it meet my targeted goals?"

---

*When adults immediately APPLY what they learn, they retain 80% three weeks later.*

*When they DON'T APPLY, they've forgotten 80% three weeks later.<sup>3</sup>*

---

### 4. Team Learning

Because adults are always seeking to apply their learning, they inherently know that most applications will require others in their team, unit, department, organization, or alliance to be aligned and committed to the solution and implementation process. This leaves the learner/leader with two inherently different choices:

- a) Sales Option: learn/develop the solution or strategy myself, then try to “sell” the whole thing to my team or subordinates
- b) Co-Creation Option: learn/develop the solution or strategy and implementation process *with* my team so they are involved in defining the problem/opportunity and committed to the path forward.

The Sales Option is what the typical hierarchical or transactional leader will chose. Why? It's primarily an ego and control issue, and certainly not based on wisdom or practicality.

The Co-Creation Option will be the typical path of the collaborative leader who will want the wisdom and insights of those affected by the solution early-on. This approach significantly reduces resistance to change, cynicism, and the “it told you it wouldn't work” syndrome.

Additionally, most adults would rather sense the elation of having a “team victory” than a divided, polarized working group. Peer acceptance and approval is highly beneficial for any change (and learning is a change process) to stick.

#### *Corollary: Synergy is the Deepest Yearning of the Soul*

Humans are, by their nature, social creatures. It is built into our DNA. Synergy is the magnetic attractive yearning people seek. They want to be in environments free of fear, free of potential attack for their ideas, free of ridicule, free of condemnation.

When the learning environment is properly designed, the applied learning solutions are a product of synergistic co-creation. This produces an emotional high – the feeling that something is going right. Time flies by. People feel good about themselves. They create group presentations that none of them could have done alone. This should be highlighted by the instructor so that the participants hone-in on the unique outcomes when synergy and trust are present.

---

<sup>3</sup> Origin: Data from Xerox Learning Centers from mid-1990s



## 5. People Support What They Help Create

Adults have egos that need to be acknowledged and made secure. People want to feel that they have a voice and that voice is both heard and heeded.

The process of co-creation is essential not only to gain support, but also to gain the insights and cautionary advice necessary to make any initiative successful.



Adults need to feel their points of view are embraced by others, which gives the sense they are at least somewhat in control of their lives. Generally they want to be included in decisions that impact their lives.

Thus they want to be involved in the planning and evaluation of their instruction. Adults learn through active practice and participation. This helps in integrating component of their learning experience into a coherent whole.

### *Corollary: Finding Meaning & Purpose*

This aspect of learning is the most overlooked of all learning experiences. It certainly is lacking in most educational texts.

Every person wants to know their life has value, meaning, and their work makes a difference. When engaged in co-creative problem solving, designing their future, team learning, there is a sense of both personal value (I make a difference) and value creation (I create something that makes the world a better place).

Humanity's search for meaning and purpose is fundamental to life itself. Many of the earliest recorded ancient writings in Babylonia, Egypt, Greece, and China record the search for meaning, where man looks to God, to Community, to his Soul to find significance and elevate himself above emptiness and insignificance.

A positive learning environment, especially one that has collaborative excellence as its central organizing principle, will give people a much deeper sense of meaning and purpose to their lives. This is when the idea of "work" shifts from "travail" to "value generation." At this point the synergistic effects of teamwork kick in, productivity improves, and non-value added work diminishes.

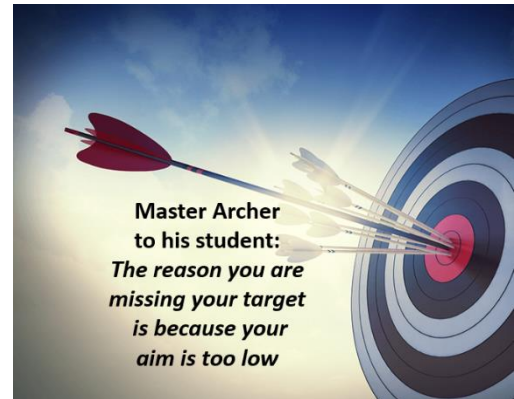
# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

### 6. Five-Step “Learning Loop” for Transformational Paradigm Shifting

Over and over again, Executive Education promotes the importance of acquiring and updating skills to meet the urgent needs of a rapidly evolving work world.

While this makes good ad-copy, it misses the mark by a wide margin. Companies are expecting that leadership development will produce influencers who can *transform* their organizations. This requires far more than skills.



Here's the disconnect: *Transformation* is, by its nature, a *Paradigm Shift*. This means that *Transformational Leadership requires Transformational Learning* to acquire the new frameworks that will truly change the way leaders operate.

However, most leadership development is not is transformational learning, neglecting the nature of how real transformational change occurs. Just improving skills is simply insufficient.

Ever since the Greeks, leaders and educators have known that great learning emerges when the *mind* and *spirit* are engaged, when people integrate *knowledge* and *desire*, when what's *best* merges with what's *good*, when *concepts* become *measurable processes*, when *mindsets* align with *skillsets*.

Paradigm shifts are the hardest to design and even after they are designed, many people can't even see the structure of the new paradigm until it's too late, because they are so invested in the old paradigm. That's why often it takes the younger generation to engage in the shift.

Paradigm Shifts require a multi-level change, otherwise the shift won't stick. Creating a Paradigm Shift means seeing today's world through a different lens. The human mind interacts with reality on at least five levels (think of these as "frames of reference,"): What you *believe* is what you will *perceive*, *conceive*, *achieve*, and *receive*. Each needs to be unified and aligned for the shift to work:

- **Believe** -- What I hold as inner values, what I think about other people, what I believe motivates me and the world around me. What I think are the governing principles in my world. Where I position my self-interest versus the mutual-interest of my community. These beliefs are seldom generated solely by the individual; most come from the culture and its leaders. Note: What one *believes* will color the course and intensity of the next four factors)
- **Perceive** -- This is how I see my reality, how I interpret what my senses tell me, whether I see my world as a place of conflict or opportunity, my possibility, my weaknesses, and what I will value most highly. Perceptions are always run through the filter of beliefs. If perceptions and beliefs don't match (called cognitive dissonance), most people are very resistant to changing their beliefs. Together what one believes and perceives constitutes their *awareness* and *ability to recognize patterns in life*.

# A New Paradigm for Leadership Development



- **Conceive** -- My conception and design architecture of my world, how I see the future evolving, my ability to be proactive as the evolving design unfolds, the commitments (or ambivalence) I choose, how I foresee my mission in life, how I conceptualize complex situations, how I consciously balance and align my personal drives to acquire, bond, create, and defend. This is what I “think about.”

*These three levels constitute one’s “Mindsets.”*

- **Achieve** -- My actions, direction, and goals. It addresses what I am going to do to achieve my conception of life, such as my role as parent, worker, leader, or other more personal mission, how I spend my time. It’s also about what I do with my resources (or lack thereof) such as how I spend my money, how I treat my friends, what I do with my intelligence.

*Actions relate directly to the “Skillsets” one develops.*

- **Receive** -- The results I get from my actions (or inactions), the feedback that tells me if I am “on point,” the rewards or other consequences from the congruence (or incongruence) of my mindsets and skillsets, the metrics<sup>4</sup> used to measure my success or failure, and the course adjustments I must make to bring my reality into alignment.

*Together, all five become one’s “Solution Set”*

If you just train skillsets, the total “learning loop” impact will be neutralized or countermanded by the other four dimensions which are out of alignment or under-developed, and the paradigm either will not



*Transformative Action Learning Engagement embraces these five dimensions holistically to ensure both a “cultural shift” and the “stickiness of the transformational shift” for individuals and teams.*

shift or shift and revert back, or get stuck somewhere in the middle of an upshift and downshift.

Failure to pay attention to the interplay between these five factors, and develop an aligned architecture has been a major factor in the inability of leadership development to have real impact in the field of operations. New Paradigm generation is the most noble of intellectual quests for it is so impactful on what the world believes, perceives, conceives, achieves, and receives in return. Yet this is also a thoroughly difficult and daunting task; one can work in intense intellectual and creative thought for a lifetime, never shifting a paradigm because one gets caught inside their own frames of reference.

---

<sup>4</sup> Every situation has its own contextual metrics. For example, the metrics in sports (such as speed, distance, accuracy, time, and completion rates) predict whether your team will likely win or lose. If the metrics are misaligned, such as focusing strictly on individual behavior, not team performance, the solution set will be out of alignment. The metrics in business will always include financial performance, which is really a lagging indicator driven by other leading indicators, such as sales revenue, innovation, etc. Metrics must also be tied to rewards.

## #3 Transformative Action-Learning Engagement

### 7. Driven to Learn

Humans all have “drives” that cause us to think, desire, imagine, collaborate, achieve, and protect ourselves, our families, and our tribes/communities.<sup>5</sup>

---

*A new Transformative Learning System  
is required  
to produce Transformational Leaders*

---

While our brains are the most complex mechanisms on the planet, there are some basic circuits that control our behavior in a normally functioning brain, and different parts of the brain are assigned responsibilities for performing these functions. Most things in the brain happen automatically, without conscious thinking, like breathing, heartbeats, and digestion, to name just a few.

“Drives” are the ultimate, irreducible motives of human behavior, and there are four basic drives in all healthy human beings (and easy to learn A-B-C-D):

- 1) Drive to **Acquire** – seeking food, shelter, reproduction, and even pleasure. Attached to this drive are certain very *basic emotions* such as *desire, achievement, and greed*. All of us have this drive, but each of us have our own personalized version of what we want to acquire.

In learning, it should be clear precisely what the participant will acquire as a result of the learning experience.

When other people are impacted, if one person gets more than their fair share, others may quickly perceive it as unfair, or even aggression or domination, and typically respond with the next drive:

- 2) Drive to **Defend** – maintaining level of safety and security, protecting ourselves from threats and aggressors that will prolong individual survival and even prevent our extinction as a species. Attached to this basic drive is the basic primal emotional reaction to danger, such as *fear*, and its derivatives such as *anger* and *vindictiveness*.

This drive is also addresses the question of risk, control, and how one handles uncertainty, doubt, and divisiveness. Everyone has a different threshold level for how well they handle uncertainty and need a sense of control of their lives.

In learning environments, it's important for participants to understand the level of risk in implementing any solution. When there is too much perceived risk, there will be substantial resistance to change.

These two basic brain functions together are often termed “self-interest” or “self-preservation.” These two drives mostly use evolutionarily-old brain regions that humans share with fish and reptiles. When a leader or trainer triggers these two drives excessively and exclusively, however, circuitry in the brain related to collaboration and innovation is inhibited, as we will explain later.

---

<sup>5</sup> See Lawrence, Paul R.; *Driven to Lead, Good, Bad and Misguided Leadership*, Jossey Bass, 2010. In this book, Lawrence presents a far more compelling framework than Maslow's *Hierarchy of Needs*. The Four Drives of Human Behavior are also outlined in two joint articles written by Lawrence and Lynch.





## Important Characteristics of All Mammals

Because humans are mammals, our brains share certain functions that are common among all mammals. The most important one for our immediate purpose is:

- 3) Drive to **Bond** —the drive to live and work in groups, such as teams or herds.<sup>6</sup> This “communal instinct” starts with our nurturing of our young. Associated with this drive are some of emotions exhibited by humans and a few higher mammals –*love, empathy, happiness, playfulness, loyalty, and gratitude*, to name a few.

The bonding impulse is especially strong in humans. It starts with pair-bonding that gives us the nuclear family and community cohesion.

This drive is extremely important because it provides the natural desire for humans to *collaborate*, coordinating their actions for their mutual benefit, and the desire to work for the “greater good.”

In any learning environment, an instructor must leader must consciously work to engage participants in team environments and ensure there is a highly discernable level of trust to sustain the collaboration. Without trust, the drive to *Bond* will be diminished or repressed, causing people to default to accentuating the drives to *Acquire* resources and *Defend* one’s turf (self-interest) rather than working together to achieve something they could not accomplish alone (mutual-interest). If these drives are in conflict then the leader must resolve this or innovation will be diminished. (in Part Five – Trust in Action we provide this guidance.)

## Unique Human Brain Circuitry

Human beings have high-order cognitive capacities that allow us to create, comprehend, find meaning, and learn.

Located primarily in the comparatively over-sized prefrontal cortex, this capacity

gives humans the ability to weigh, balance, and align the drives to *Acquire*, *Bond*, and *Defend*. We term this capacity:

---

*We hear the clarion call for Transformational Leadership, but fail to link it with a dynamic Transformational Learning Experience.  
This Paper addresses this gap*

---

- 4) Drive to **Create** – the unceasing impulse of humans to comprehend the world around them, to find meaning, to imagine a better future, to solve problems and puzzles, and to build new and better things. Attached to this drive are emotions we often call *spiritual* such as *inspiration, wonder, and awe*. We see the drive to *Create* manifesting in children at a very early age; people are just naturally innovative.

It is this very human drive to *Create* that every instructor wants to trigger to engage in joint problem-solving. This is the drive where inquiry and curiosity lies.

---

<sup>6</sup> Scientists have studied this quality going back all the way to the ancient Greeks and have concluded time and again that these characteristics all have served very important evolutionary functions to give mammals a competitive advantage over reptiles. A very small percentage of any species of mammal seems to be born without this quality. In humans we call these psycho- or socio-paths.



## What's Wrong & How to Fix It

### #3 Transformative Action-Learning Engagement

By reinforcing the drive to *Bond*, a leader emphasizes *collaboration*, and by simultaneously reinforcing the drive to *Create* the leader stimulates *innovation*. The good news is that it doesn't require hiring new people, just tapping the massive capacity for innovation already within its organizational boundaries. In tandem, these two drives give people a deeper sense of meaning and purpose, as well as what we often refer to as *conscience*.<sup>7</sup> Further, the drive to *Bond* activates the pleasure circuitry of the drive to *Acquire*. This gives leaders a "win-win" way to stimulate innovation: it benefits both the individual and the group.

Each of the four drives operate both independently and interdependently. Each drive must be satisfied in some reasonable proportion, otherwise people will feel unfulfilled. And if people feel unfulfilled, they will seek fulfillment of the drive that's lacking in some other way. In designing learning activities, the Four Drives of Human Behavior need to be addressed so that there is a high likelihood that every learning experience will satisfy each of the Four Drives.

We've arrayed the four drives in the form of a "leadership compass." (see **Error! Reference source not found.**) The four drives are easy to remember: A, B, C, & D)

But exactly how does an instructor know just what proportions of these drives are needed? How does one steer the organizational ship with the compass? How do we stay on the collaborative innovation course?

To illustrate, think of your car's front-end when you are driving: if the one of the wheels is unbalanced, you get feedback from the pounding the tire creates when it's bouncing and not running smoothly. And when the front end is out of alignment, the car is always pulling to one side or another, constantly needing correction. Our brains give us similar feedback if we tune into

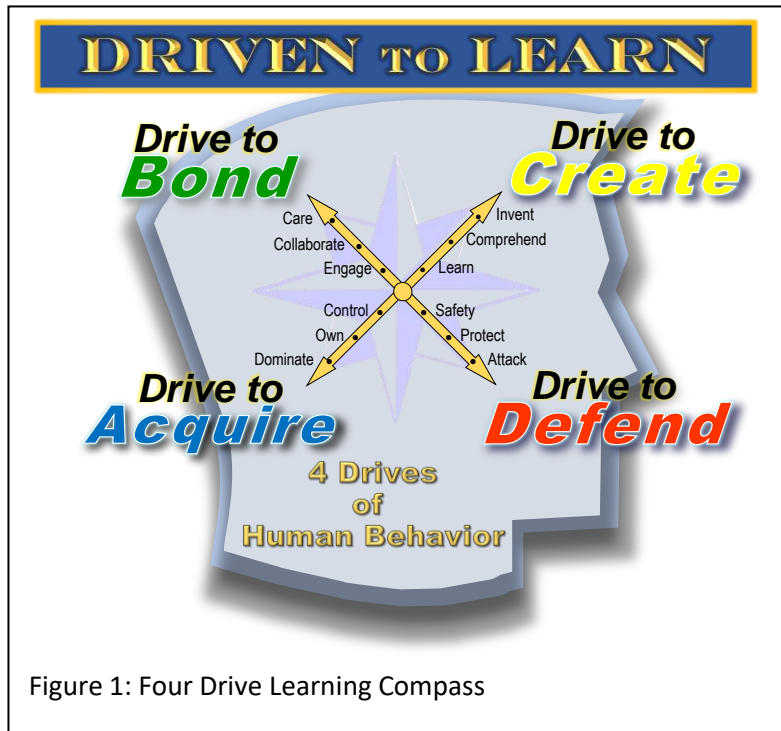


Figure 1: Four Drive Learning Compass

<sup>7</sup> Psychopaths are defined as people without conscience; they lack empathy because their brains have an impaired capacity to process oxytocin. Darwin maintained that a conscience was the primary feature that distinguished humans from other animals.



its signals. When everything is tuned right, we trust and synergy often manifests, when out of balance and alignment, we distrust and anxiety is present.

## 8. Architecture & Mental Modeling

### *Pattern Recognition*

The brain is a massive Pattern Recognition & Prediction computer; this is part of the brain's most basic needs -- to recognize patterns and predict outcomes from those patterns.

By understanding a pattern of circumstances, the drives to **Acquire, Bond, Create & Defend** interact to determine if we can safely move into the future, acquire what we need or desire, who we can work with, and how much we can count on others to help understand the reality around us.

When the brain engages in the three stage query – WHY? WHAT? HOW? – it is looking for the design of things – the “architecture.”

This is why understanding the architecture of things is so important; it creates a pattern the brain can recognize quickly, make necessary assessment, and take appropriate action.

---

*Architecture is the design that aligns, integrates, and enables a system's diverse components to function efficiently & synergistically.*

---

### *Scrambling the Brain*

While the human brain is highly sophisticated pattern recognition machines, we can also scramble the brain's prediction mechanisms if we fill our world with high levels of ambiguity, uncertainty, and chaotic complexity. In any learning system, the brain will be ascertaining, often unconsciously:

What's the Pattern? What does it tell me? Is there danger ahead? Should I take precautions?

What's Next? Same? Different? Unknown? Predictable or Unpredictable?

Does the pattern tell me how something functions? How does it work? How should I be prepared? Is there a Reward? Punishment? Consequence?

What is the most Predictable Outcome/Unfolding?

- Is the outcome random – a matter of Probability? (for example, if you turn on the television, what are the chances of encountering an advertisement?)
- Is the outcome based on Cause & Effect? (if sun low in the western sky, can I predict that nightfall will happen soon?)
- What are the Rules of Engagement? (how can I be proactive to take advantage?)
- What is the Safest Assumption? What are the Distinctions that enable Greatest Accuracy?

**Table 1 Ambiguity, Uncertainty & Complexity**

– <b>Uncertainty &amp; Ambiguity</b>	– <b>Unclear Direction</b>
– <b>Paradoxical Complexity</b>	– <b>Fuzzy Mission Statements</b>
– <b>Continual Reorganization</b>	– <b>Mixed Messages</b>
– <b>Continuous Change</b>	– <b>Misaligned Rewards</b>
– <b>Conflicting Goals</b>	– <b>Mixed Leadership Styles</b>

# What's Wrong & How to Fix It

## *#3 Transformative Action-Learning Engagement*

- **Political Cross-fire**
- **Insufficient Collaboration**
- **Silo Mentality**

- **Chaos & Turbulence**
- **Anxiety & Stress**
- **Opposition**

into the information stream, the brain will get confused, clogged, and will often become fearful, withdraw, and find the safest position possible. This often manifests as resistance to change, anger, or anxiety.

In situations where the learning must embrace these factors, learners will want to know how to recognize the difficulties and take appropriate action.

Our brain always wants to organize the patterns so we can make better predictions. This is what happened during the Corona Crisis. Scientists were deeply engaged in understanding the patterns of the pandemic – both the science of the disease and the human behavior patterns. Those who followed the probabilities of the pattern were the safest -- they were able to avoid the likelihood of becoming sick and dying. Those who denied the pattern's realities had astronomically higher chances of catching the disease and either dying themselves or passing it along to others.

When the brain can't understand the pattern, or receives conflicting information about the pattern, it typically defaults to safety, or fear, inaction or even denial (the lack of recognition of anything (such as the Black Swan phenomenon).

When it comes to social interaction, our educational system has done a poor job enabling the brain to recognize patterns of human behavior, particularly about collaboration and leadership excellence. That's why we elect leaders who are corrupt – we don't see their lack of a moral compass, we evaluate wealth or power higher than conscience or compassion. That's why dictators can still get away with telling lies and spreading fear.

That's also why, when we encounter senior executives and ask them if they run collaborative organizations, they answer affirmatively. But when we survey employees, the responses are very different. Essentially, senior leaders were too well imbued with outmoded or muddled pattern recognition frameworks, which has distorted the realities of what collaborative excellence really means.

This is one of the most important reasons why good models and communicative graphics are essential to an effective Transformative Action Learning Engagement.

### *Simplicity*

We live in a highly complicated world. People are deluged with data. Complexity clutters our brain's circuitry often just adding confusing information (see Table 1 above).

Studies of the brain show that we are most likely to remember things if they are simple, visually augmented and contain no more than five things – that's why phone numbers are clustered in groups of three or four numbers and postal codes are optimally no more than five characters.

# A New Paradigm for Leadership Development



When acronyms are used, they should have some semblance of meaning.

For example, an acronym like **POSDCORB** is virtually useless. It stands for **P**lanning, **O**rganizing, **S**taffing, **D**irecting, **C**o-Ordinating, **R**eporting and **B**udgeting, which are key management functions.

Compare that with **START**, which stands for **S**pirit, **T**rust, **A**dversity Response and **T**eamwork which are key factors for success in building a collaborative culture.

People will forget **POSDCORB** in a flash, but remember **START**.

When managing complexity, remember **KISS** – **K**eeP **I**t **S**imple & **S**traightforward, but, as Einstein admonished, not too simple as to lose the key issues.

## Mind MAAPPSS

Leaders and educators should be adroit in using key tools to frame complex ideas in simple ways. Mind **MAAPPSS** are six tools to communicate often ambiguous or intricate issues



**Metrics:** Putting a number into the message

gives it a sense of concrete reality. For example, notice the difference between “the baseball pitcher threw a fastball” and “the baseball pitcher threw a 100 mph fastball.”

**Architecture:** People can relate to something that has a design. For example, notice the difference between “he took a ride on a vehicle” compared to “he took a ride on a train.” They know the train has an engine, cars, a caboose, and travels on tracks – the systems design architecture is communicated in one word.

**Actions:** Actions speak louder than words. For example, “John thought about voting in the next election,” as opposed to “John drove five of his elderly neighbors to the local voting station.”

**Pictures:** A picture speaks a thousand words. Try to describe the cloud formation in a thunder and lightning storm compared to seeing a video of the wind tearing the treetops and lightning bolts plummeting into the ground.

**Stories:** A story has a beginning and end, it travels a journey, it has heroes, antagonists, and emotions. People remember stories, especially when coupled with the other mind mapping elements.

**Symbols:** These are images that represent things that people understand and value. For example, the national flag (the colors and picture have very deep meanings and emotions of patriotism, honor, glory, battles, and heritage, to name just a few. Logos are another means of creating a symbolic image.

# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

Leaders and educators will use these Mind MAAPSS to solidify something quickly.

### Part Three: Creating the Stakeholder Strategic Alliance

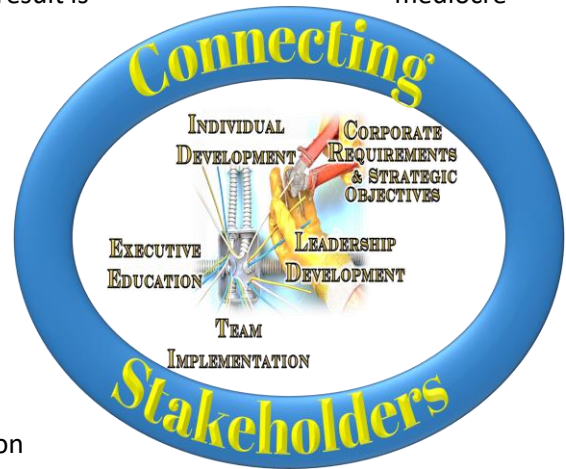
In White Paper #2 we examined the problems in Executive Leadership Development. Much of the dissatisfaction with Executive Education originates with the disconnects between the realms of Executive Education and Corporate Requirements – the result is mediocre performance.

#### Aligning Stakeholder Interests

Our Collaborative Leadership Institute has its origins in what we learned in the field of Strategic Alliances.

The solution to the Stakeholder Disconnect problem is to build a strategic alliance between Learning Delivery and Organization Development which also aligns the other vested stakeholders:

- *Strategic Leadership Objectives* of the Corporation
- *HR Department* that will be selecting the participants
- *Implementation Teams* who will be applying the learning
- *Individual Managers/Leaders* who desire capability building
- *Organization Development Sponsors* who are expecting transformational results.



The job of initiating and managing the stakeholder alliance is joint the responsibility of the Leadership Institute (the Transformative Learning Provider) and the Corporate Client (the team responsible for implementation).



In the sections that follow, we discuss the elements of building the **Transformative Action Learning Engagement** – the strategic alliance that underpins the *New Paradigm for Leadership Development*.



# A New Paradigm for Leadership Development

---



We call this “engagement” – because we engage and connect at multiple levels to ensure we are producing real, measurable results, not just lots of ideas and enthusiasm.

## *Key Questions Clients Should Be Asking*

Every Client sponsor and stakeholder should be concerned with several key questions about the Action Learning process, because it is actually quite different from the approach typically used in colleges and universities at the undergraduate and graduate level (remember, here we are talking about Advanced Executive Development, not graduate-student MBA learning).

- First, does Action Learning increase performance at the individual, team and organizational levels? Are the measurements in place by the senior managers the right ones?
- Second, can the improvements in learning and performance be observed and measured as a result of an Action Learning experience? Is there a feedback loop? Will it be effective at making changes and adjustments?
- Third, how exactly does Action Learning work? What can stakeholders do to increase the chances that they will get a positive, high quality outcome?
- Lastly, what are primary causal factors and secondary support factors that will determine success in conducting the learning?



As your Learning Provider, we have built in many answers to these questions into the Collaborative Excellence Program.

## *Five Key Factors for Success*

There have been numerous studies about the power of Action-Learning and its power to impact results. Here are the Five Key Factors for Success that every Client company should embrace:

1. Action Learning is most effective when used to develop broad executive and managerial leadership skills, particularly collaborative leadership and coaching skills;
2. Action Learning significantly enhances managerial ability to generate integrative, win/win solutions to difficult situations and reduce destructive conflict;
3. The most important leverage points that practitioners identified as critical success factors included: questioning, taking action, learning from group members, listening, group diversity, feelings of confidence and well-being, safe environment. and the presence of a coach;
4. Successful Action Learning programs were designed to engage at two levels:
  - a. Teams, specifically team-level processes of skilled coaching, diversity, self-directed team processes, effective team presentations and review of team processes; as well as



# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

- b. Organization-level processes of ensuring implementation of solutions, alignment and importance of the problem, support of top decision makers and the leveraging of organizational resources.

### Building High Performance Action Learning Experiences

#### *What Makes a Successful Action Learning Experience*

We think that it's be helpful for you to know what research and our experience has determined:

- Insightful Questions: Participants attribute almost half of the development of leadership capability via Action Learning to focusing on insightful questions that cause introspection, root cause analysis, discovery of interrelationships, cause and effect impacts, and the reflection and analysis of those insights
- Collaborative Innovation: The second most important factor was the ability of teams to work together (rather than individually) to assess problems and generate innovative solutions. They cited the ability to learn from each other, asking “cascading questions” (going deeper into root cause). Those managers who learned to listen “between the words” to understand different points of view became more effective.
- Strategic Advantage: By understanding the linkage/alignment between strategy and operational performance, managers see how their short-term work produces long-term advantage, which gives their work more purposeful meaning as well as giving people as sense of job security in rapidly changing times.
- Action Orientation: The ability to take action (rather than get trapped in bureaucratic indecision) to correct problems and implement new ideas is a real energy boost.



When researchers examined the obstacles that got in the way of people becoming better leaders, the typical culprits showed up: excessive workload, not enough time, wrong composition of the team, and poor coaching skills within the team or from an outside facilitator. This means the Human Resource group must be involved in the assessment of teamwork, how members of teams make contributions to the advancement of the organization, and their long-term growth prospects.

Choosing the right team is something that should not be left to chance, a random grouping of people, or a reward for good behavior. It takes people with a passion for







change as members of the team. And if people are not suited to an action learning environment, can they be reassigned?

We cite these factors in order that your planning for the Action Learning component of the Program be as successful as possible.

## *Working Together*

Throughout this Program, we request Client companies work with us closely make the program a success. This is a must; both the Client Sponsor for transformation and the Executive Learning Provider (us) must work together, be aligned (the “alliance”); we must be more than “involved,” together we must be committed and engaged.

While *Collaborative Excellence* is generic, how that is achieved varies with each unique company and is influenced by tradition, culture, size, composition of work force, industry classification, geographic location, organizational structure, and budget. That’s why we ask that the Client Company take charge of the Action-Learning component of the Program, with our assistance.

Throughout this Program, we endeavor to weave these into the fabric of the Action Learning Process, and we request Client companies work with us closely make the program a success – our success is your success.

While Collaborative Excellence is generic, how that is achieved varies with each unique company and is influenced by tradition, culture, size, composition of work force, industry classification, geographic location, organizational structure, and budget.

That’s why we ask that you, the Client take charge of the Action-Learning component of the Program, with our assistance. In the end, the client sponsor and his/her team have to be responsible for the program’s success.

A well-constructed and tailored Action Learning Plan, with strategic and operational objectives— using many reliable measures, success criteria, Key Performance Indicators, & diagnostics of behaviors — is the first step in development of a short- and long-term implementation. There may be an associated budget for this, depending on the nature of what is happening and the scope. For example, if the Client is engaged in large scale transformation, there may be additional costs. Other Clients may task their work teams with more incremental improvements that are easily woven into current activities. This is a meaningful first-step in establishing a trusting relationship with corporate clients.



In other words, the Planning & Design of the Action component of the Learning Process is worthy of taking the time to think through exactly who, why, what, where, when, and how the participant practitioners will be putting their learning to work. We strongly encourage participants to come in

## What's Wrong & How to Fix It

### *#3 Transformative Action-Learning Engagement*

teams (at least a pair of people) so they can orchestrate implementation together, thinking through the analysis and formulating a plan together.

When and if appropriate, we might spend a couple of days on-site to provide a stem-to- stern evaluation of strengths and weaknesses and then jointly develop an appropriate plan-of- action.

This starts the relationship with clarity of goals, roles and how we will interact to achieve both.

#### **Action Learning Management Requirements**

In most Resource Requirement outlines, the typical list would involve such things as people, time, money, and technology.

We are going to focus this dialogue on the people aspect because that is the most important factor for success in collaborative excellence:

1. Executive Sponsor
2. Program Champion
3. Program Project Manager
4. Program Coach/ Facilitator
5. Participant Practitioners





## 1. Executive Sponsor -- Gaining Top Rank Support

Top-rank support is critical. Without it, the Collaborative Excellence Program will wither over the long haul as unsupportive people will undermine the effort.

*Top level executive sponsorship is often referred to as the “godfather” role.*

As the Learning Alliance is formed, we will work with clients to identify those senior executives who are advocates for change, are articulate about the reason(s), and are determined to overcome obstacles and resistance. These people are known as “champions of change.”

Part of our role is ensure the senior champion(s) are adequately armed with the knowledge, persuasive position statements, metrics, strategies, and potential breakdown responses to be successful. In addition, if there are influential people that might ruin the effort, aren’t willing to change, or don’t have the right values, we will advise what might need to be done, including replacement, retirement or reassignment.

For some, the Collaborative Excellence initiative will look like one more “flavor of the month” and be perceived by traditional-thinking management as a “foreign entities” or something “uncontrollable” by command and control processes. Ultimately, without an Executive Sponsor, these unsupportive people will undermine the effort. Top level executive sponsorship is often referred to as the “godfather” role.



Once the *Collaborative Excellence* Initiative begins to have widespread organizational impact, established power structures and political relationships will be required to adjust to the shift. The presence of the sponsor/godfather validates the strategic value of the venture and helps shield it from the onslaught of naysaying cynics and those threatened by the initiative’s very existence.

### *#3 Transformative Action-Learning Engagement*

#### *2. Program Champions to Advocate for Collaboration*

Experienced leaders frequently note that the sponsor/godfather role requires far more than just support, seeing it as a “protector to provide air cover!” A champion from our focus groups commented:

“We need a godfather to protect us. But often the godfathers get clobbered themselves by the empire builders and fiefdom creators, who we threaten because they perceive collaboration as diminishing their power.”



The seemingly innocent activity of getting autonomous business units to work together within a company can be fraught with anxiety. Business unit executives with profit and loss responsibility might possibly see collaboration as a threat to their power and authority, and even a drain on their resources, thereby diminishing their business unit's profitability -- all fodder for political infighting. One successful leader from a German company commented:

“Collaboration has been unpopular because it has been challenged by our powerful 'empire builders' who believe their way is better.”

The sponsor/godfather's support becomes increasingly evident once the collaborative initiative begins operations, as reflected in this comment:

“Without a strong sponsor/godfather to influence the corporate rewards system, the real benefits of collaboration may be lost. Understanding how they must use their leverage on the organization's leadership is essential.”



In addition to the Executive Sponsor, someone should act as the “champion advocate” for the initiative. The champion is a leader who is charged with making the initiative take shape and become a reality. Often this person can also double as the Program’s Project Manager.

In smaller and middle-sized companies, the Sponsor and Champion may be the same person, different in larger companies. (In larger companies there are made need to be several champions to integrate across multiple divisions.)

Senior management begins by selecting a champion – a leader who is charged with making the initiative take shape and become a reality. This person can also double as the Program’s Project Manager.

Champions are probably the most influential factor in creating synergistic relationships that achieves a mighty purpose. Without an accomplished champion, the chance of successfully sustaining and nurturing the initiative is dim.

Cooperation within and beyond the walls is in many companies considered an unnatural act. Champions are at the same time entrepreneurs, risk takers, visionaries, and results-oriented managers with energy and perseverance. Champions exist in a perpetual state of enlightened dissatisfaction, always looking for a new idea that will improve upon the current state of affairs. Typically, they have a long history of pursuing new ideas, attempting breakthroughs, and challenging the accepted.

### *#3 Transformative Action-Learning Engagement*

Champions cannot command because their authority is not positional. Their authority comes from their vision, their energy, and their ability to touch the hearts of those who believe their vision is the reality the organization must achieve for more than its future *survival*, that vision contains the organization's *thrival*.

To be effective the champion needs to be a realist with a track record of success. Yet down deep, most champions are filled with strong ideals and values; therefore they often tend to become overly optimistic. Thus it is not ironic that the hallmark of real champions is not how many successes they have had, and they will have had many, but rather how they have dealt with failure. Failures should be the learning experiences that temper their idealism sufficiently to make them effective. Often the best champions will have at their side a seasoned realist or skeptic to provide balance and practicality to their idealistic vision.

#### *3. Program Project Manager*

The Program Project Manager's role is to ensure all the nuts and bolts of the Collaborative Excellence Program are launched and function effectively. This person should be a strong advocate of the program, and work closely with the Executive Sponsor, Steering Committee, Champion, Coach, and Key Stakeholders.

#### *4. Program Coach/Facilitator*

This role is for someone who can work both as a facilitator during the learning sessions, and with the participant teams "in the trenches" implementing Action Learning transformations in the field.

Generally, this is a seasoned person with great interpersonal skills, but also a strong desire to see concrete results. With the Program Manager, the Coach/Facilitator will also conduct program evaluation and review.

Not surprisingly, many champions are entrepreneurial at heart, which enables them to excel with broken tools and inadequate resources, under adverse conditions, and with minimal organizational support. Their impact can be undermined when previously committed budgetary support is pulled.

Champions typically are "omni-directional," in that they know the necessity of navigating the halls of power, and at the same time are willing to jump the chain of command or network the bowels of the organization.

Although champions think of organizations as networks, not hierarchies, they also somewhat grudgingly, but patiently acknowledge the realities of the corporate ladder, without giving it their blessing.

The best champions are adept at overcoming their enthusiastic advocacy with a good dose of listening and asking questions, particularly if they are project managers. They are devoted to building a team of experienced action-learning oriented people, which is crucial to any change program success.



This person ensures the practitioner teams are working together as a creative problem solving group, and brings together the key individuals who will have to buy into the plan.

As the Learning Provider, we work with the Client Company to identify the right person for this work.



## 5. *Participant Practitioner Teams*

Assembling the right teams is a critical factor to success. The teams are assembled to perform specific application tasks as a vital component of the Action Learning process. The Champion and Steering Committee, with input from the Stakeholders should select the people to participate in the Collaborative Excellence Workshop Program. These team members should be volunteers, supportive of the collaborative concepts, and have enough time to devote to the effort. Typically, that means relieving individuals of some of their normal workload so that they can focus on the initiative process.

Experience has shown that just putting highly creative people on a team neither generates breakthroughs nor drives convergence. All too often the creative people are too individualistic to be great team players or too competitive with each other, or their creativity escalates into generating even more creativity with no grounding in reality.

Effective teams are diverse, developing a very healthy balance between creativity and practical implementation, which enables members to experience the “synergy of compatible differences” – that very elusive chemistry that characterizes powerfully successful collaborative innovation.

As the Learning Provider, we work with the Client Company to identify those people with the right aptitude to be collaborative managers and leaders versus those that don’t have the drive and/or knowledge to move into roles where collaborative excellence will produce new levels of advantage and performance.

As facilitator this individual keeps people emotionally engaged, making the best use of team resources, maximizing each member’s potential, and monitoring their personal needs and also focusing them on the ultimate objective.

As integrator, this individual acts as liaison between diverse groups, often translating one corporate culture’s needs into terms understood by the other culture.

Facilitator-integrators tend to have excellent listening skills and are highly tuned to the personal needs and sensitivities of team members, thus contributing enormously to the building of a consensus. Often they will search for resources and ideas from outside their team by accessing, leveraging, and building other external networks.



# TRANSFORMATIVE ACTION LEARNING ENGAGEMENT<sup>sm</sup>





## Part Four: Action-Learning Structure --Making Transformation Stick

### Preconditions for Success

#### *Getting Prepared for the Collaborative Excellence Program*

There are several “Preconditions for Success” a potential client should be thinking about to be prepared for this Workshop Program:



#### **1. Is the Program endorsement and supported by Key Stakeholders?**

It's imperative that Senior Management endorse and support this effort. Collaborative Excellence will touch virtually every part of the company in some way.

A united Senior Leadership Team in supporting the Program is an important precondition for success.

This should translate into a specific senior executive sponsor -- champion in the C-Suite -- to inspire the participants and to ensure senior management is aligned with the effort.

#### **2. Is there a clear alignment between the Program, Mission, Objectives & Rewards?**

While these issues don't have to be solidified yet, stakeholders should be asking what impact they expect from the Collaborative Excellence. Senior stakeholders need to understand how business processes have evolved, the digital revolution, the impact of Artificial Intelligence, the change of industry operations.

Specifically, how well does our mission align with your corporate vision, strategy, and approach to the future of your business.

Here is our mission, which your team should assess to see how well we align with your and if there is the likelihood our Program is compatible with your pathway to the future:

- Empower Leaders to build organizations that perform at extraordinary levels by generating trust, enabling teamwork, stimulating innovation, creating new sources of value, aligning functions, constructing internal and external alliances, and managing complexity. Building interconnected systems where work is focused on the most qualified individual to complete the task.
- Build Leadership Capability that can create spirited and energized organizational cultures, work productively in teams, integrate across the boundaries of specializations, respond rapidly to change, use differentials in thinking and diversity of cultures to spur joint innovation and problem solving.
- Provide Leaders and Managers with the design systems thinking, core principles and processes, best practices, and tools to perform collaboratively in situations requiring interaction, joint effort, and high complexity.
- Use Collaborative Excellence methods and processes to avoid the pitfalls of polarization, unproductive conflict, withdrawal, disengagement, and divisiveness.
- Increase the ability to Engage Employees in finding meaning and purpose in their work
- Provide a series of frameworks and methodologies to improve day-to-day operational communications and teamwork, while substantially reducing the amount of non-value added work.

# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

- Reduce the risks of running an organization by enabling more work, problem solving, and decision-making to be done at lower levels.
- Provide a structure for assessing performance blockages, areas of impeding breakdowns, and root-cause understanding of human behavior meltdowns.
- Reduce turnover among millennials by giving them more meaning and purpose in their lives, along with a sense of family/community they can trust.
- For those who attended technical or professional schools, provide the strategies and methods they did not receive in their formal education enabling them to increase their personal and teamwork capabilities significantly.



If there are areas where we aren't aligned, you should be assessing what needs to be adjusted to bring things into convergence.

### 3. Is our Value Proposition worthy of the time, money, and human energy invested?

Ultimately, the Mission of the *Collaborative Excellence Program* is to increase significantly a company's Competitive Advantage through Collaborative Systems Design Architectures, Strategies, Methods, Principles, Processes, Metrics, and Rewards.

In most organizations, the Collaborative Excellence Program aims to create sustainable 25% improvements in Competitive Advantage including Profit, Productivity & Innovation Gains by aligning and integrating people, functions, and value chain partners.

Note: the 25% gain is achieved via the "triumph of small numbers," which are the result of increases derived from better strategic alignment, improved cultural energy, operational performance boosts, removal of non-value added work, lower turnover, lower transaction costs, improved higher value-chain integration, and greater innovation.

### 4. Is there a strong compelling rationale for the Program?

People want to know the reason "Why?" they should make the Collaborative Excellence Program a major priority, devoting the time, focus, and commitment necessary to succeed. The Program should have a direct STRATEGIC impact on the company's future. If needed we will work with the sponsor and a small internal team to develop strategic direction and analysis of the competition. The best approach is to tie the Program directly to the company's mission, purpose, value proposition, and organizational values. Collaborative Excellence, at the highest level, is designed to create COMPETITIVE ADVANTAGE. If this linkage is vague or misconstrued, perhaps this is not the right program or the right timing.



What would be the compelling rationale that would satisfy senior management and attract people to the Program?

### 5. Does the Human Resources Department endorse the Collaborative Excellence Program?



HR is an important stakeholder in the decision to proceed. People's future is at stake; employee engagement is a very powerful outcome and foundation of Collaborative Excellence, which as has been *proven to lower turnover* because it:

- engages people
- improves morale
- builds tight teams
- creates high levels of trust
- recognizes the value of people
- channels energy into purposeful action
- capitalizes on the joint creative energies of employees
- empowers employees to become more entrepreneurial
- flows ideas and innovation across internal and external boundaries
- maximizes the creation of value while reducing non-value added work



Does this Program mesh with HR's strategy and operational approaches? (HR should be part of the team putting together the corporate strategy to improve chances of success.)

## 6. Have we developed Metrics of Success?

Excellence in virtually everything is dependent upon quality metrics. Without identifiable measures, management is like sifting fog, and there will be no unanimity of vision, value, methodologies, and results. At the early stages, a company should be thinking about what metrics should be used as a gauge for determining whether the program achieved its objectives.

## 7. Do we have Base-line Diagnostics of Health?

Alongside Metrics must be Diagnostics which can be used to ensure the organization is functioning well and any emerging difficulties can be addressed before they create a crisis. The Collaborative Excellence Program addresses many core criteria for Diagnostics of Health, which can be adapted to any organization's unique culture and industry. Any annual review should include the baseline diagnostics plus post-Workshop assessments.

## 8. Formulating a Prospective/Preliminary Plan

Important questions should be asked (but don't need to be solved quite yet) that establish an "internal improvement strategy." Here are some of the questions the sponsors should be asking:

- "What levels of the organization will be part of the capability building?"  
How willing is the leadership team to make wholesale changes to the organization?  
(the answers will drive some of the following questions)
- "What departments, branches, or business units will pilot the first rounds?"
- "Do we use a 'top down' or combination of 'top down, bottoms up' rollout?"
- "How do we message the program?"
- "What are the biggest concerns of the participants?"
- "What will be the biggest objections and resistance?" and a myriad of other practical issues that should be anticipated and dealt with before the first session. Getting out in front of these questions is essential so we don't become reactive at the outset.

# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

### Workshop Methodology

We have found that Workshops are the most appropriate and effective learning methodology for transforming strategies and ideas into best processes/practices which produce actions that get results. Workshops are different from Seminars that exchange ideas and lectures that deliver information. (see [Appendix Two – Difference Between Workshops & Seminars](#) )

A Workshop's intention:

- aims at transforming strategies into action, with metrics of success
- joins learning with work, ideas with implementation, thinking with application
- addresses a problem, goal, opportunity, or initiative with the purpose of improving things
- is attended by core groups or teams that will apply the learning directly thereafter
- provides participants with the mind-sets, skill-sets, and tool-sets which comprise a solution-set
- has follow-up activities to ensure the deployment of action-plans after the learning session
- is presented or facilitated by an educator/coach with experience in the subject area

### Understanding and Analyzing the System and the Process

Many managers, when given the task of Process Analysis will immediately jump into the task, overlooking the larger system in which the process resides. An example will illustrate how to avoid this mistake.

When Toyota had tremendous success reengineering the processes of automobile manufacture (called "Lean Management"), engineers all over the world jumped at the chance to use Toyota's methodology and process maps to change the way things were done, ranging from delivering mail to hospital procedures. One thing the engineers "knew" that got them in deep trouble in the end (but they wouldn't recognize at the time) was a mantra driven into them by their graduate school professors:

*If it doesn't have a process, it just doesn't exist.*

This belief may be true for *technology*, but not for *humanity*. Social systems are driven by "principles" not the "laws of physics."

So, the engineers plowed away at discovering the processes for lean management, and did a thorough job creating step charts and analytical tools to accomplish their tasks.

However, most Lean Management initiatives failed, 80% were cancelled by the third year; 90% were judged failures by the end of five years.<sup>8</sup>

What happened? The engineers overlooked the system dynamics and were hopelessly trapped in their myopic view of the world. What did they miss?

Toyota, unlike its competitors at Ford, General Motors, and Chrysler, had installed a system of *Collaborative Excellence* (they called it by another name) that built an extraordinary level of trust and teamwork into the culture. Toyota's leadership was fastidious in protecting this culture and did little to discuss it with the outside engineers who studied them. In other words, the governing factors for

---

<sup>8</sup> According to data by the Lean Management Institute. Our Canadian team created a "collaborative version" of Lean, which we called "Collaborative Lean" and installed a trust-based Collaborative Innovation Culture in client companies. Our success rate was 90% using this system.





success looked as invisible as radio waves, but nevertheless Toyota employees were “tuned to the collaboration frequency.”

When the outside engineers then tried to transplant their process-driven Lean Management system into other companies -- most of whom had adversarial, transactional, or muddled cultures with little or no trust and did not value teamwork -- the initiatives fell flat on their face. Naturally, the Lean “Experts” blamed their client companies for improper implementation, usually citing lack of senior level sponsorship as the cause of failure – they missed the mark because they held erroneous beliefs, which created clouded perceptions, which led to the wrong conceptions of the problem and the wrong actions to solve the problems.

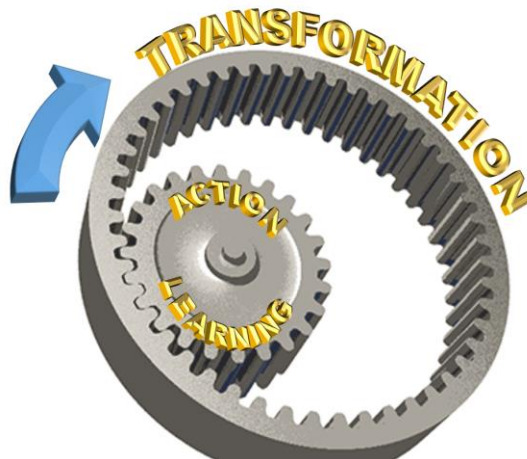
We mention this example for two reasons: first, the *Collaborative Excellence* program will help many initiatives succeed, and second, before jumping into process analysis, a larger systems analysis, including the organizational structure, measurements, and culture is in order.

We suggest Client Companies choose at least one senior person on the Steering Team who realizes that no process exists in a vacuum – the context of the larger system will often have overriding governing variables that must be addressed. We can provide tools for systems analysis that will help reveal those cultural issues that need to be addressed to produce high performance.



75% of Senior Executives  
are Dissatisfied with the  
Inability of Executive  
Education to Produce  
Transformative Results

What can be done  
to Shift the  
Paradigm?



### Appendix ONE: Sample Course Structure

#### 101 Basic Level Program Content:

Each of the following areas are custom designed to your industry & company. With the exception if the Basic Level Program, all elements of the Advanced, Focused Application, and Master Level programs are optional. If you have an additional specific issue to address, we are open to new ideas.



#### Understanding Fundamentals of Collaborative Excellence

- 010 **Why a System of Collaborative Excellence?** – Fully Integrated Breakthrough Architecture
  - a) Competitive Advantage of Collaborative Excellence
  - b) Why Collaboration has broken down over time
  - c) Importance of Embedding Architecture in Leaders and Corporate Culture
- 101 **Four Drives of Human Behavior** – Understanding the “Nature of Human Nature”
  - a) Drive to *Acquire*
  - b) Drive to *Bond*
  - c) Drive to *Create*
  - d) Drive to *Defend*
  - e) Major Advantages over Maslow’s Hierarchy of Needs
- 102 **Impact of Trust** – Foundation of all Collaborative Enterprise
  - a) Economic
  - b) Employee Performance & Well-Being
  - c) Impact on Millennials
  - d) Creation of Successful Alliances & Eco-Systems
- 103 **Architecture of Trust** – key frameworks and trust building methods
  - a) Misconceptions about Trust
  - b) Ladder of Trust
  - c) 8 Principles of Trust
  - d) Who should not be trusted
  - e) Key Factors for Success – Character, Leadership, Culture
  - f) Fast Tracking Trust
  - g) Rebuilding Trust
- 104 **Three Archetypes of Culture** – seeing culture three dimensionally
  - a) Adversarial
  - b) Transactional
  - c) Collaborative
- 105 **Power of Collaborative Culture on Human Behavior** – bringing out the best in people
  - a) Spirit
  - b) Trust
  - c) Adversity Response
  - d) Teamwork

A Learning Module typically follows a Four-Stage Capability Building sequence:





# A New Paradigm for Leadership Development



- 106 **Collaborative Innovation** – Best Processes & Practices for using differential thinking
  - a) Harnessing Differentials In Thinking
  - b) Designing an Innovation System – 10 Core Processes
  - c) Designing Breakthroughs
- 107 **Economic Power of Trust** – how trust creates productivity & profits
  - a) Reduction of Non-Value Added Work
  - b) Acceleration of Speed
  - c) Empowering Innovation across Boundaries
  - d) Cross-Functional Synchronization
  - e) Value Chain Integration
- 108 **Value Creation** – Beyond Money
  - a) Value Evolution – Designing the Next Shift
  - b) Value Maximization – Levering Collaboration to Multiply Value
  - c) Measuring Value & Transforming Value into Competitive Advantage & Profits, Triumph of Small Numbers
- 109 **Four Alignments of Collaborative Leadership**
  - a) Strategic Alignment
  - b) Cultural Alignment
  - c) Operational Alignment
  - d) Dynamic Realignment
- 110 **Managing Complexity with Collaboration**
  - a) Impact of Collaboration on Complexity
  - b) Law of Compounding Risks
  - c) Law of Unintended Consequences

[Download Generic 2-Day Collaborative Excellence Executive Development Brochure](#)

## Multiple Versions Available

This 101 Basic Level Program is available in different “contextual” and “delivery” formats, depending upon the audience.

The “Generic Contextual” format is intended for a wide range of Senior & Emerging Leaders. The Program can be contextually adapted for a variety of specific audiences, such as supply management, alliance management, risk management, project management, and HR management.

## 80-20 Configuration

Each version is designed such that 80% of the core architectures are *common to all versions* – enabling different professions to communicate fluidly with each other. For each version, 20% is custom tailored to the unique context of that profession, using examples each profession can relate to.

Because the Learning Program Design aims at immediate application, rather than use a preponderance of case studies, the participants will apply solutions to their own real-world issues – a real life case study.



# What's Wrong & How to Fix It

## #3 Transformative Action-Learning Engagement

### Delivery Formats

Our Transformative Action Learning Engagements are offered in two delivery formats:

- Extended Virtual Learning
- Immersive Learning

### Extended Virtual Learning

Virtual training occurs on-line over a one-year period guided by one of our pracademics, and facilitated on location by an adult learning specialist or consultant.

### Immersive Learning

There are times when there is a sense of immediacy when an intense 2-day program is the better approach. Often this is done at the pivot-point for launching a Collaborative Excellence Initiative for senior leaders to get on the same page. Often the immersive learning experience is augmented by videos, written materials, podcasts, webinars, and other supplemental materials, then followed by the Virtual Learning as the program expands into the organization.

### Executive Champions, Programmatic Approach & Critical Mass

The issues of Executive Champions & Critical Mass must not be overlooked.

Without vigorous *sponsorship* (not just lip service) at the senior leadership level, the commitment to a real *Program* of Collaborative Systems Excellence, and the aggregation of a *critical mass* of leaders *and* managers, participants will be faced with the problem of “corporate immunal rejection response” -- re-immersion back into the host culture and being treated as a foreign body or irritant by those who have not crossed the chasm from traditional transactional or adversarial cultures into the elevated realms of collaboration.

### Program Roll-out Map

While every Collaborative Excellence Program is unique to each company's industry, needs, & culture, we generally follow a basic structure:

**Step One: Executive Briefing & Planning**– No initiative of this importance can start without Senior Sponsorship and Leadership Team buy-in. They must be briefed on the content of the material, and have sufficient understanding to be able to act as sponsors and champions. Because the organizational language and thinking will shift, senior leaders must be able to conversant, skilled, and ready to lead the charge.

The outcome of the Executive Briefing is to develop a plan for implementation, with emphasis on target sections within the organization where internal champions already exist and the initiative is most likely to succeed – producing “quick hits.”

**Step Two: Diagnostic Health Check** – Before launching a program, it's essential to do a health check assessment the organization to determine base-line issues, pinpoint critical areas needing special attention, customizing the approach, and being sure to retain key strengths upon which to build a program.

Once the assessment is complete, it's vital to feed-back the data, first to senior management and then to those who took the survey to get their input/buy-in, then aim at engaging those affected by the change in developing an action-plan for corrective achievement.

**Step Three: Learning Labs/Workshops** which *both teach and practically apply* the Collaborative Excellence Architecture, addressing real day-to-day objectives, strategic initiatives, and imbedding capabilities in your organization.

**Step Four: Establish Pilot Projects** that produce quick results to reinforce the value of the Collaborative Excellence program. This provides measurable evidence and core learning for wider applications.

**Step Five: Train Internal Capability Builders** from the corps of internal trainers, on-boarding specialists, and HR/O professionals to ensure the program is institutionalized well into for the future.



## 201 Advanced Level Program Content:

The 201 level courses are available to those who have taken one of the prerequisites: 101 Virtual or Immersive learning or reading the forthcoming book *Collaborative Leadership Excellence* by Robert Porter Lynch.

### Strategic Leadership Professionalism

The Advanced Level programs are intended for senior and emerging leaders who are ready to engage in complex organizational transformational initiatives.

For the years 2020-21, we are offering four advanced program architectures:



1. **Leading Advanced Organizational Transformation**

Intended for organizations needed a systematic collaborative shift, or a turnaround due to poor performance, or the acquisition of new businesses, or enabling diverse business units or departments to function more effectively.

2. **Leading Strategic Supply Chains**

Intended for senior supply chain executives ready to move to a more strategic leadership position beyond supply chain management where innovation, speed, or better integration of internal and external functions is imperative

3. **Leading Complex Projects**

Intended for senior project managers tasked with large, complex projects with many organizational interfaces, supply chains, stakeholders, further complicated by potential breakdowns, changing conditions and uncertainties.

4. **Leading Strategic Alliances**

Intended for Alliance Managers moving to more strategic roles where their parent company is investing in more impactful alliances or building ecosystem networks. Also for Supply Chain Leaders seeking to build more strategic supply relationships or orchestrate value networks.



# What's Wrong & How to Fix It

## *#3 Transformative Action-Learning Engagement*

### **301 Mastery Level -- Focused Applications for Integration & Transformation**

We offer a “deep dive” into a number of the key issues at the heart and soul of successful collaboration. These are normally ½ - 1 day workshops. Prerequisite: 101 Level completion.

- 301 **Neuroscience & Bio-Economics of Collaboration & Trust**
  - a) The Brain Science behind Trust
  - b) What Evolutionary Science & Bio-Economics tells us about collaboration
  - c) Diagnostics for Collaboration
- 302 **3 Archetypes of Culture, Leadership, & Economics**
  - a) Adversarial Leadership & Economics – Rules of Engagement & How to Neutralize
  - b) Transactional Leadership & Economics – Rules of Engagement & When to Use
  - c) Collaborative Leadership & Economics – Rules of Engagement & How to Shift
  - d) Impact of Culture on Behavior – the Key Issues & Leverage Points
- 304 **Leadership -- Influence Without Authority**
- 305 **Economics of Trust & Trust's Impact on Profits**
- 306 **High Performance Teamwork** – Choosing the Team, Going to the Next Level
- 307 **Cross Functional Integration** – Connecting Siloes with the Right People
- 308 **Resistance to Change** – Why It Happens and What To Do Correctly
- 309 **Millennial Retention** – Keeping the Workforce Intact
- 310 **Diversity as an Engine of Innovation** – the Real Power of Diversity
- 311 **Collaborative Communications** -- Art & Science of Listening & Asking Questions
- 312 **Business Ethics & Equity** -- International Code of Conduct, 12 Principles of Equity
- 313 **Collaborative Exercise of Power & Control** -- How to make Consensus-Based Decisions
- 314 **Collaborative Marketing & Selling** -- Joining Forces to Create & Deliver Greater Value
- 315 **Collaborative Research, Development, & Commercialization** -- Increasing the chances of new discovery coming to market profitably
- 316 **Collaboration for a Sustainable Planet** -- how to create organizations, networks, and alliances to fulfill the Purpose, People, Planet, Profitability Mandate.
- 317 **Human Resource Development for Collaborative Companies** -- selecting, recruiting, and promoting the right people & maintaining a collaborative culture
- 318 **Collaborative Excellence in Non-Profits & Government** – Trust, Teamwork and Alliance Building in community & civic affairs
- 319 **Collaborative Communities** -- Revitalizing cities, towns, and neighborhoods by collaborative engagement with key stakeholders
- 320 **Building a Breakthrough Value Proposition** -- how to use metrics to create collaborative alignment and success.
- 321 **Collaborative Strategy** – Stratagems for Synchronized Execution to Win
- 322 **Strategic Alliances, Eco-Systems & Fasttime Value Networks**
- 323 **Strategic Alliance Formation Workshop** – Structuring & Launching with your Partner
- 324 **Collaborative Business Management** - ISO 44001 Certification
- 325 **Designing Synergy** – Using Differential Energy to Produce More with Less
- 326 **Complex Project Management** – Aligned Project Delivery, Staying On-Time/Budget





- 327 **Value Maximization through Collaborative Excellence** – Gaining Value Advantage
- 328 **Collaborative Capitalism** – Building the Most Competitive & Profitable Business
- 329 **Strategic Execution** -- Leveraging Collaboration to Launch New Initiatives
- 330 **HR's Role in Sustaining Collaborative Culture**
- 331 **Organizational Health** -- Metrics & Diagnostics of Collaborative Interaction
- 332 **Collaborative Risk Management** – Rethinking the Paradigm to reduce risk 30%
- 333 **Using Collaborative Excellence Architecture to Ensure Successful Acquisitions**
- 334 **Building An Innovation-Focused Supply Chain** – Creating Sustainable Advantage
- 335 **Collaborative Lean Management** – Eliminating Non-Value Added Work Successfully
- 336 **Managing Collaborative Contracts** – Agreeing in a Fast Moving Rapidly Changing World
- 337 **Co-opetition** – How to Join Forces Successfully with a Competitor
- 338 **Collaborative Contracting** – Designing and Implementing Trust-based Contracts
- 339 **Collaborative Value Bidding** – How to Get the Best Value & Lowest Cost of Ownership
- 340 **When Collaboration is NOT the Best Strategy** – Knowing Limits & Alternatives
- 341 **Designing Breakthroughs and Cracking Paradigms**
- 342 **Orchestrating Turnarounds** – Using Systems Design Architecture to get the best Results
- 343 **Collaborative Innovation Networks** – Building a Sustainable System of Innovation
- 344 **Leader as Systems Design Architect** --Building the Leadership Team, & Fostering Champions
- 345 **Enabling the Board of Directors to Understand & Support Collaborative Excellence**
- 346 **Dolphin Defense Strategy** (preventing sinister incursions into collaborative synergy)
- 347 **Expanding Collaborative Excellence to Partners in the Value Chain/Network Strategy**
- 348 **Giving Stakeholders a Stake in the Game** – Profit Sharing & Equity Options
- 349 **Training the Trainer** – Building Your Internal Training Team to Grow Collaborative Excellence

**All Programs Supported with world-class thinking, and many Proprietary Reading Materials**

- We will develop or adapt courseware on-demand if that's what's required.



### #3 Transformative Action-Learning Engagement

#### Appendix Two – Difference Between Workshops & Seminars

##### *Workshops versus Seminars*

There is often confusion about the difference between a “workshop,” a “seminar,” and a “program.” Here’s our perspective:

- **Workshop:** a “workshop” connects strategies and practices directly to tools and applications aimed at producing real results quickly. A good workshop is aimed directly at Capability Building to produce leaps in performance.
  - The best Workshops are Immersive Learning Experiences, designed to transform teams, enabling them to produce high performance results.
- **Seminars & Roundtable Discussions:** a “seminar” or “roundtable” is a discussion of ideas, concepts, or options.
  - Its purpose is to convey knowledge, exchange points of view, and give advice on how to be successful. But seminars and roundtables *do not aim at building capability for successful implementation*.
- **Program:** a “program” is more systematic – it aims at integrating strategy and implementation.
  - It consists of multiple elements, including briefings, planning, diagnostics, leadership & resource commitments, engagement, implementation roll-out, metrics, action workshops, feedback and learning.
  - We recognize that for Senior Engineers in the field, much of Collaborative Systems Excellence and Leadership training cannot be done solely as an academic exercise; it must be exercised in the heat of a real challenge – in the crucible of action and the tension of emotions.
  - Our programs focus on integrating frameworks & architectures with success factors, tools, coupled with a heavy dose of application. For this reason, for senior executives we do not rely heavily on case studies, but instead use the pressure cooker of real life situations, simulations, and interactive co-creation.
- **Critical Mass -- Team versus Individual Learning:** We emphasize the *importance of building capabilities within both individuals and teams*.
  - A team learning experience has a major advantage by generating a critical mass of people who “get it;” they:
    - Support each other when implementation hits a bump in the road.
    - Build Pilot Projects to demonstrate quick results
    - Convince Senior Leadership that Collaborative Excellence produces real-time value
    - Help prevent “post-partum implosion” by beginning to imbed Collaborative Excellence into the organizational culture.