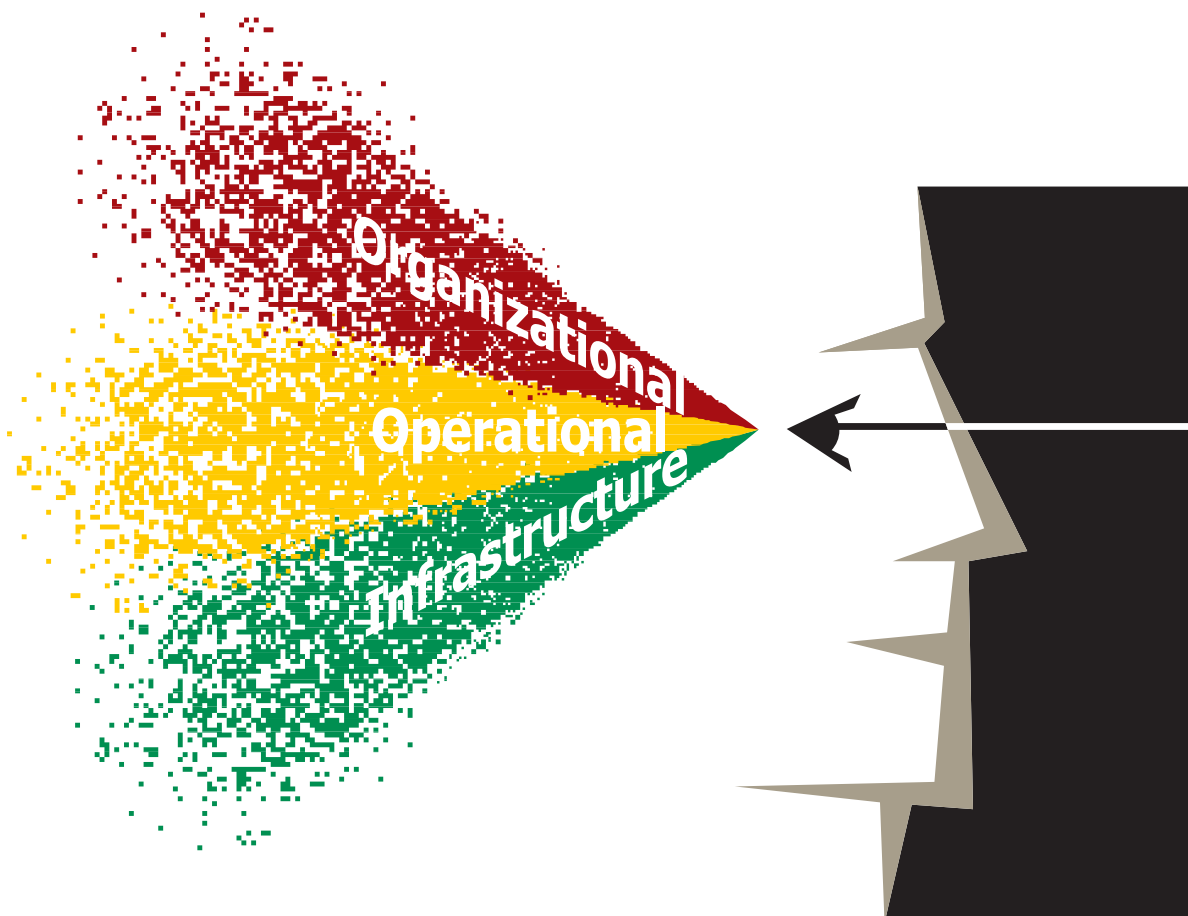




Knowledge-Advantage, Inc.

Dimensions of Success

From Intuitive Thinking to Thoughtful Actions



The "Fast Path" approach to ensuring the early-on and ongoing success of your business initiatives or solutions.

Introduction

Welcome!

I expect you are reading or considering reading this book for any one of the following reasons:

- A colleague suggested you read it.
- A customer, client, or prospect suggested you read it.
- A vendor suggested you read it.
- It was provided as part of participating in a *Knowledge-Advantage* program.
- You are at the airport waiting for your plane and the cover caught your attention!

I hope it is for one of the first three reasons. I also hope the copy you are reading was a personal copy that someone “marked up” and gave you to read with the intent of getting together in the very near future to use the framework and supporting tools within this book.

To the extent you are the first one within your “circles of influence” reading this book, I hope that it proves valuable, and as a result, you are suggesting and using it with others (colleagues, customers, clients, prospects, vendors, etc.) in the very near future.

Be Careful What You Ask For...

“This certainly is an unbelievable situation to be in,” Mike Abernathy said to himself behind the security of his closed office door. He threw his hands up in the air in frustration, thinking about the last forty-five days and what he had signed up to do.

“Unbelievable!”

Forty-five days ago John Topkins, the CIO of Morgan Industries (MI), had asked Mike to be the IT project leader for MI’s “Seize the Moment” eBusiness initiative. It was a great opportunity. Being selected as the project leader of MI’s eBusiness initiative occurred at the perfect time. Though Mike had enjoyed a track record of successes in supporting roles for a number of previous initiatives at MI, he was anxious to advance his career and he knew he needed to “step up” if he were going to meet his personal and professional ambitions. When John Topkins presented the opportunity, Mike thought this was the ticket he had been waiting for! Now forty-five days into the initial sixty-day phase of the project plan, he was truly wondering what he had gotten himself into.

Of course the first thirty days had gone by in seemingly perfect fashion. All of his defined activities had been executed exactly to his timelines. He had documented all his key findings from each of his meetings, making sure to distribute them to all of the key stakeholders. Yes, everything had gone exactly as planned.

Then just two weeks ago, albeit subtly, things began to unravel. He was still successfully gathering “high-level” information regarding requirements. But he now wondered if he was asking the right questions and capturing the right information. There had been no self-doubt before. And then there was the little matter of providing the business case to justify MI’s eBusiness initiative. He was beginning to really worry about this. While the benefits appeared obvious, expressing them in hard dollars and cents seemed now an overwhelming challenge.

With just fifteen days to go, he was still looking at a white board full of stuff! It seemed the more information he gathered, the more overwhelmed he became. For the first thirty days of the initial phase, all he could think about was the personal and professional rewards he would realize by being the project leader. For the past fifteen days, all he could think about was the potential consequences if he failed.

“Fifteen days and counting,” he thought to himself. Again he threw his hands into the air and started mumbling softly to himself. “I knew when I accepted responsibility for this initiative I’d hit some speed bumps along the way. I knew that. What I didn’t anticipate were the potholes.”

Mike had a history of responding to challenges. Many times he made up for what he lacked in the way of know-how by relying on his persistence and intuition. He was

good at that. During his days as an applications programmer, he had stayed up many a night when necessary trying different things until he power-solved the problem at hand. Mike had always figured that when the chips were down, his persistence and intuition would see him through. Only this time he wasn't so sure. Times were getting tough. The clock was ticking. His back was to the wall. All the old clichés. And to make matters worse, John Topkins had just left him a voice message requesting they meet within the week to formally review the status of the "Seize the Moment" eBusiness initiative.

As Mike attempted to regain his composure, he caught himself wondering if and when history would repeat itself!

Ready, Set, Go...

“Day ten on the job, new hire orientation behind me, quota assigned, now it's time to put a plan in place,” Kevin thought as he sipped his coffee and scanned the business section of his personal copy of *The New York Times*. As with any new employee with a new company and a fresh assignment, Kevin was genuinely excited to get off to a fast start with his employer, Integrated Services And Products (ISAP).

Kevin Cooper was thirty-five and had just recently joined ISAP as a strategic account sales representative. Prior to joining ISAP, Kevin had spent fourteen years as a sales professional with a globally recognized IT products and services provider. Kevin had a track record of consistently meeting his numbers while maintaining extremely high customer satisfaction ratings. And as he entered day ten of employment with ISAP, he had every intention of repeating history.

Grabbing a notepad to organize his next steps, he thought to himself, “define my plan... work my plan... seek client feedback... refine my plan... work my plan. Yes, that’s the way to do it. That’s the way to succeed.” Experience had shown Kevin that the recipe for success was based on combining three things: this personal mantra, the right methods and tools, and his 100% commitment to serve the interests of his prospects and clients. As he flipped open the cover of the new notepad, he thought, “no time like the present to get started!” He then reached for his territory assignment.

The territory assignment served two purposes at ISAP. First, it defined the companies he was responsible to sell to and serve. Second, the territory assignment drove the assignment of quota. The list had four “named” accounts. Three of the accounts were existing clients and one was a prospect. Management seemed to believe that the key to his success would be to focus on his current clients. That was clear just by looking at the list and noting the percentage of quota assigned by account.

While Kevin respected at “face value” what the numbers suggested, he knew he would need to make his own assessment.

From The Top...

“All right, time to go through this one more time,” Mike said to himself. He looked up at the white board full of information and then looked down at his desk at the journal in which he kept, or attempted to keep “detailed minutes” for each of his key meetings over the past forty-five days. Opening the notebook to the first page he began reading and rolled his eyes. The header said “Day #1 - Meeting with John Topkins - MI’s CIO.” Mike shook his head, mumbling to himself as he did so, and began to reread the entire journal entry for day one.

Day #1 - Meeting with John Topkins - MI’s CIO (60 Minutes)

- Here is to Success... Because... Failure is not an Option!
- This is my chance to be a project leader for a major IT initiative within MI.
- Opportunity is being presented based on previous achievements.
- The initiative was born out of a series of statements made to investors by Jim Bowman, MI’s CEO.
- Internally, the initiative has been officially named “eBusiness - Creating a Collaborative First Mover Advantage.”
- Unofficially, it has been named “Seize the Moment” by Jim Bowman.
- Urgency to deliver this solution successfully is extremely high.
- I will have very high access and, as a result, visibility to key members of the executive team throughout the organization.
- The first 60 days (Phase 0) is critical to ensure expectations for the overall initiative are properly set for all involved.
- John will make himself readily available and he will do whatever he can to assist during “Phase 0.”
- He expects to have a formal assessment of “where we are” on or before day 55 of “Phase 0.”
- In closing, he volunteered that with the success of this solution, I can be assured of significant career advancement within MI.

Mike thought about the notes he had taken from his meeting with John. Before he had been named the project manager of this initiative, John had told him, on several occasions, that he was one of his “up-and-comers.” Mike had just assumed that John, being such a great people person, had shared similar encouraging thoughts with many of Mike’s peers as well. While he knew John was pleased with his performance, this was the first major action John had taken to support his previous words of encouragement.

Mike turned the page with an increasing sense of urgency and read about his first meeting with MI's CEO Jim Bowman. "That is a meeting I will always remember," he thought to himself. Mike had been at the company six years and had only met Jim twice before, once at a Christmas party, and once at a summer barbecue/picnic with karaoke for entertainment. The night before the meeting, Mike stayed up until four a.m. to prepare. He prepared for every conceivable question that Jim might have. But the meeting didn't go as he had expected.

Day #3 - Meeting with Jim Bowman - MI's CEO (22 Minutes)

- His office is huge!
- After about a minute of chatting, he gets right to the point.
- "We have doubled our size over the past three years based on acquisitions."
- "We do not have the resources to continue to grow through acquisitions."
- "Worse yet, the combined resources as a result of the acquisitions are under utilized."
- "Growth is flattening and margins are just beginning to erode."
- "We must continue to outthink and outmaneuver our competitors."
- "Key to our success is finding ways through our existing resources to better serve new and existing clients."
- "We need to get started now; quick wins are critical; we do not have time to bake a complete answer."
- "If we don't get there first, our competitors will."
- "Sue Jacobs, who runs Sales & Marketing, owns the 'Seize the Moment' initiative from an operations perspective."
- "I expect you, within the next sixty days, to create a solid plan and gain the commitment from all the key executives who must be involved for the 'Seize the Moment' initiative to be a complete success."
- "I will make myself readily available and do whatever I can to assist you."
- "The success of this solution will determine your future with MI."

A few days after his initial meeting with Jim, MI had announced "less than expected" results to its investors and MI's stock subsequently dropped 18%. As Mike reread his notes, he realized there was more meaning to the words than he had known when he jotted them down. Of course Mike had wanted to ask Jim a number of questions to further clarify some of his statements, but a combination of Jim's style and a fear of "asking the wrong questions" had prevented Mike from probing further. Mike remembered that he had felt both a sense of relief having survived his initial "one-on-one" and a deep curiosity to know exactly what Jim meant by his comments on the success of the initiative

determining his future with MI. Certainly, his curiosity was beginning to get the better of him now!

Mike compared the notes in his journal to what he had written on the white board. The two sets of notes were almost identical. He shook his head, wondering what exactly he was looking for. Then he began reviewing the next journal entry.

Day #6 Meeting with Sue Jacobs, VP of Sales and Marketing (45 Minutes)

- Sue is extremely cordial and makes me quickly feel right at home.
- She asked about my background and “personal wins” for this initiative.
- I replied candidly about my wanting to do a great job for the business and as a result advance my career within MI.
- She stated that she was appointed by the senior leadership to own the end-user requirements for the “Seize the Moment” initiative.
- She shared enthusiastically that she wanted to help with this initiative.
- She also shared cautiously that at the end of day she will be ultimately judged by how well she meets her numbers (Revenue, New Sales, and Client Satisfaction).
- Her bottom-line, when push comes to shove, is that she will not allow this initiative to become a distraction to her meeting the numbers.

Only now, in hindsight, and perhaps still only intuitively, could Mike appreciate the real meaning of some of the notes he had taken. To Sue’s credit, she had made it very clear from the start how she was motivated. They had agreed via phone that their initial meeting would simply be a “getting to know you” session, and after that they committed themselves to getting together the following week to begin hammering out the specifics for MI’s “Seize the Moment” eBusiness initiative.

Mike needed to take a quick break before he continued reviewing his journal entries. A quick trip to the company cafeteria for an expensive cup of “branded coffee” would provide him with a good mid-morning boost and a break from his worries. But as he was returning to his office with his double café latte, he heard his name. Looking up, he saw John Topkins. John waved his hand, gesturing for a moment of Mike’s time. They met by the water fountain, and John put his hand on Mike’s shoulder.

“Mike, I’m starting to get a few questions and comments from some of the senior leadership about getting a formal update on the status of the ‘Seize the Moment’ initiative. I just wanted to let you know I’m looking forward to our review some time before the end of next week. Subsequent to our review we can take forward our findings to the leadership team for their consideration and action.”

John turned and walked swiftly back to his office.

“Great,” thought Mike. “Just what I needed, an optimistic assumption about the value of our upcoming review!”

Mike retreated to his office and closed his door. With his double café latte steaming, he went back to reviewing his notes.

Day #9 - Meeting with John Topkins (30 Minutes)

- Reviewed in detail my session notes from my time with Jim and Sue.
- He seemed genuinely enthused by both what I was sharing and the fact that it was clearly documented.
- Outlined my next actions for the coming week, which included meeting with Doug Johnson (MI's CFO) and scheduling a two-hour follow-on session with Sue.
- John made two specific suggestions regarding next steps:
 1. First, quickly schedule a call with an analyst from one of the IT research firms we have on contract to gain their perspective.
 2. Second, contact 2-3 recognized vendors in the eBusiness space to let them know that “MI is in the preliminary steps of investigating an eBusiness initiative.”
- John offered that in prior initiatives, he has invited vendors early-on into a “controlled” environment and as a result received a number of good “free” ideas.
- John concluded with a few kind words of genuine praise.

Mike sipped his double café latte and thought about what John had recommended he do. He was still certain he had done exactly what John had suggested. However, somewhere in the execution of John's suggestions, something had gone wrong. Oh yes, a lot of “free” ideas had been provided. Unfortunately, the word that “MI had a funded eBusiness initiative” got on the street, and suddenly ten vendors had descended upon him like a flock of vultures.

Mike looked up at his white board to scan the potential vendors still in the running. He had narrowed the list from ten to three very quickly. Even now, Mike shook his head in disbelief when he replayed the amazing stunts some of the vendors had pulled. He had never before fully believed in the phrase “Caveat Emptor - Let the Buyer Beware.” But he had seen the truth of it firsthand, the way some of those vendors had behaved. It was truly amazing what vendors thought they could get away with!

Still shaking his head, he turned back to his journal.

Day #12 - Analyst Inquiry (30 Minutes)

- Analyst was very knowledgeable with regards to the technology required to successfully enable an eBusiness initiative.
- She was weak with regards to how MI should consider using it to gain a “first mover” advantage in our industry.
- She provided some value with regards to what she called the “soft factors” (people, process, motivation) surrounding an eBusiness initiative.
- Reviewed the set of assessment criteria used by her firm to evaluate eBusiness vendors.
- Provided a revised list of 3 reputable vendors MI should consider in the initial assessment.
- Also discussed how external service providers and systems integrators are being used for eBusiness initiatives.
- Closed with an open invitation for me to checkpoint as I felt necessary in the coming weeks.

Mike recalled thinking at the time that that meeting was a good use of thirty minutes and that he would most likely take the analyst up on her offer to checkpoint in the coming weeks. Still trying to understand where things had gone wrong, he continued reading.

Day #13 - Vendor Requests (90 Minutes)

- Contacted the three vendors from the analyst’s “recommended list.”
- Attempted to be 100% consistent with what I told all three (expectations, timing, etc.).
- Two did a great job listening; the third must have been having a bad day.
- Stated I would like to meet for two hours “one-on-one” with each of them to exchange ideas.
- All stated they would bring additional individuals to the initial meeting.
- I asked each to drop in the mail an overview of their company, their offerings, and how they believed they could help MI with its eBusiness initiative.
- All agreed to meet within the next two weeks.

Finishing his café latte, Mike thought it ironic how what appeared to be a straight forward request could, without his even being aware, spin so quickly out of control. He laughed half-heartedly and then reminded himself of the task at hand. He should not wonder at the actions of characterless vendors that would do anything at all when they smelled an opportunity! “Focus!” he shouted, crushing his paper coffee cup and tossing it in the trash. Then he leaned forward and jumped back into his notes.

Day #18 - Meeting with Sue Jacobs - VP of Sales and Marketing (90 minutes)

- I started by asking what Sue expected from the “Seize the Moment” eBusiness initiative.
- She listed her priorities:
 1. Find Ways To Drive Labor Out of the Sales and Marketing Equation
 2. Ensure Sales and Marketing Professionals are “Doing the Right Things”
 3. Build Loyalties with Current Clients
 4. Make MI Easier To Do Business With
- For each of her expectations, I asked her to expand on what she believed was required to ensure success.
- As instructed by John, I worked hard to both accurately capture her thoughts and make sure that as I questioned, she knew I was not questioning her, but only questioning to gain clarification and understanding.
- Our time together was cut short by 30 minutes based on an unforeseen client crisis.
- Sue apologized for the circumstance and said she could easily schedule additional time next week.
- We agreed to do so.

Mike looked at the outline on the white board with regards to “end-user” expectations. They accurately reflected his original notes from his meeting with Sue. Feeling confident that he had built solidly on what she had initially shared, he continued to the next page in his journal. But when he saw the journal heading, he immediately felt a sudden wave of angst. The meeting had been with Doug Johnson, MI’s CFO.

Doug had a reputation for being a “strictly business” executive and was considered by many within the IT organization as objective, analytical, and, most importantly, decisive. A few of Mike’s peers offered very specific advice with regards to meeting with Doug. They all said the same thing. Get to the point. Think dollars and common sense. And make sure you know the value of what you can offer. As Mike began rereading his notes, he got a sudden chill.

Day #22 - Meeting with Doug Johnson - CFO (25 Minutes)

- His office is very sparse. Other than pictures of his family, there are no decorations.
- He encourages me to sit at his couch to have our discussion.
- I quickly share what I have been asked to do with regards to the “Seize the Moment” eBusiness initiative.

- Doug then quickly took over the conversation.
- “There is value in technology when it is used appropriately,” Doug said.
- “Unfortunately most IT solutions fail to deliver their expressed or intended promise.”
- “All investment requests must have a concise business case.”
- “Show me the *Balance Sheet and Income Statement* impact, from there I can figure out what it means to our overall financial performance.”
- “Lay out in a simple format the inflows and outflows for the eBusiness initiative.”
- “As a part of the business case, tell me the risks we should anticipate and what we can plan to do to mitigate them when they occur.”
- In closing he said, “Under no circumstances are high visibility/urgency initiatives an excuse for insufficient due diligence.”

Mike rubbed his hands together, hoping to banish the chill his meeting with Doug had prompted. Rereading the notes had forced him to replay the meeting in his mind with vivid, icy clarity. Surprisingly, Mike had found Doug’s style to be engaging, but he was confused nevertheless. He had written down exactly what Doug had said about his expectations for a business case, yet Mike didn’t have a clue what he would do with the information he had captured. In fact he wasn’t altogether sure what Doug had been talking about, an unsettling thought to say the least, and one which had occurred to him during the meeting itself.

There was Doug talking away and Mike had been struck by the oddness of the words. “It’s like listening to a foreign language,” he had said to himself, and for a moment Doug disappeared and Mike was mentally transported to Barcelona, Spain and a vacation he had taken there some years earlier. Mike was trying to get to the bullfights and had asked a taxicab driver for directions. The taxicab driver responded with great enthusiasm, smiling and gesturing with his hands, and there was Mike, nodding but not understanding, and then he thanked the driver anyway and went off to ask directions of someone else.

Mike looked up at the right-hand corner of the white board and the words he had written there.

*Balance Sheet & Income Statement Impact
Inflows & Outflows
Know and Mitigate Risk
Ensure Proper Due Diligence*

Mike stood slowly, stretching, trying still to regain some measure of warmth. “I am an IT professional,” he thought, “not a financial analyst. What do they expect from me?” Mike knew he would have to bring this issue up with John when he had his review for

the “Seize the Moment” eBusiness initiative next week. For now he had more work yet to do. “Focus,” he said for the second time that morning. “You have to focus.” Then his stomach growled and he looked at his watch and saw it was nearly time for lunch. One more journal review and he would swing down to the cafeteria for a “blue plate” special. He could stay focused that long. His stomach growled again, but he did not notice.

Day # 30 - A Day with The Vendors (3 - 2 Hour Sessions)

- The day was exhausting.
- Attempted to run each session exactly the same way.
- All of the vendors talked/presented more than they listened.
- Identified a couple of “free” ideas that should prove helpful downstream.
- The claims made by one of the companies was truly “unbelievable.”
- All suggested next steps that included a request to meet with MI’s senior management (CEO, COO, CIO, etc.).
- Stated clearly that meeting with MI’s senior management was not appropriate until the “Phase 0” findings were presented.
- Stated that I would follow-up personally with each of them within the next two weeks regarding if/how we would go forward together.

Mike pushed his journal aside and headed down to MI’s cafeteria, still shaking his head. Even now it was still hard for Mike to fathom the arrogance displayed by one of the vendors. “One thing I know for certain,” he thought, “I will never do business with that individual. And, if we are known by the company we keep, I can’t imagine myself buying from his company anytime soon either.”

Mike entered the cafeteria with one goal in mind. He wanted to get his “blue plate” special without being noticed and quickly retreat back to his office. He had work to do. Unfortunately, the cafeteria offered little cover.

“Hey Mike!” came a shout from across the room. It was Sue Jacobs. Mike groaned inside but tried to present a calm yet cheerful façade. Sue walked quickly down a center aisle and caught Mike just as he was about to enter into the lunch line.

“Mike, I got another call from yet another vendor asking to meet with me to discuss MI’s “Seize the Moment” eBusiness initiative. As we discussed last week, I am not sure how this occurred, but if the word is on the street, it is only a matter of time before our competition catches wind and there goes our first-mover opportunity.”

Sue paused a moment, waiting for Mike to nod in acknowledgement, and then continued.

“At this point, I’m ignoring their calls. But knowing the persistence of sales professionals, I’m sure they’ll catch me via phone when I least expect it, and when they do, I’m sending them straight to you. Just a heads up.” Sue smiled abruptly, almost politely, and then walked quickly out the cafeteria door.

Mike waited in line for his “blue plate” and replayed what had just happened. “It is difficult enough to get my hands around the project management of this initiative,” he thought. “Now I have to facilitate the role of vendor management for a solution that does not yet formally exist!”

“Here you are,” said the server from the other side of the counter. “Bon Appetite!”

Mike grabbed his plate, paid the cashier, and hurried back to his office. Closing the door, he dug into his lunch and turned to the next page in his journal.

Day #31 - Meeting With John Topkins (30 Minutes)

- Reviewed quickly the chronology of events over the past three weeks.
- John paid close attention, but I could tell something was on his mind.
- After reviewing my notes, I asked for suggestions.
- He asked how I thought things were coming together. I could tell his question was not just idle curiosity.
- Responded that I have and continue to gather a tremendous amount of information.
- Stated that I am attempting to sift through the data to draw the relevance as swiftly as possible.
- He asked earnestly what he could do to help.
- Responded: “Stay Tuned.”

Reflecting on that meeting, Mike became pensive. “That was clearly the-writing-is-on-the-wall meeting,” he thought to himself. “I should have seen it coming, but I missed it. What happened to my famous early-warning intuition?” Mike took a few quick bites of his “blue plate” special and shuffled through his notes. There were only a few entries left and he was resolved to revisit them all in the next hour. He took another bite, the taste of his tasteless food barely registering in his mind, and began once again to read.

Day #32 - Meeting with Sue Jacobs (45 Minutes)

- Sue must have left her “agreeable” style at home today.
- Her style is much more aggressive than in our previous meetings.
- Volunteers her priorities again without asking:
 1. Find Ways To Drive Labor Out of the Sales and Marketing Equation
 2. Ensure Sales and Marketing Professionals are “Doing the Right Things”
 3. Build Loyalties with Current Clients
 4. Make MI Easier To Do Business With
- Is concerned that she does not see any evidence of progress with this initiative.
- Also questioned why IT vendors were attempting to call her directly.
- Restated that in the end “numbers matter” most to the senior leadership team.
- I attempted to begin drilling down in earnest on her expectations.
- As before, I listened actively but began to question some of her assumptions.
- She immediately sensed the subtle but deliberate change in my approach.
- Her assistant knocked on the door, and said that Doug was waiting on line #1 to review the forecast.
- Her closing comment as she ended our meeting to take Doug's call was, “Mike, this is exactly what I was talking about!”

Mike remembered walking out of the meeting thinking about the movie *Dr. Jekyll and Mr. Hyde*. That was clearly the first visible sign of what was to come, he thought, and he was about to jump into the next journal entry when he suddenly made a second previously unrealized connection. The day after his meeting with Sue, MI had made a public statement to reset revenue and earnings expectations for the coming quarter. That change had most certainly been the major factor in Sue's dramatic change in attitude.

Day # 32 - Voicemail from John Topkins (<1 Minute)

- Asked if everything was all right with Sue.
- Shared that she left a message “venting” frustration.
- Stated that Sue sometimes behaved this way to get attention.
- Made the offer to make himself available if I needed assistance.

Then as now, Mike has been truly impressed with how John has tried to support and back his efforts. He was still very glad that John was his boss, a thought that gave him a slight boost as he labored through the next journal entry.

Day #37 - Unsolicited Vendor Bid - ISAP Corporation

- The vendor representative I admired least delivered an unsolicited bid via overnight mail for MI's approval.
- I reviewed the contents in complete disbelief.
- The scope outlined is completely off the mark with regards to what I am remotely beginning to define as a viable answer.
- A contract based on the scope is enclosed for MI's signature.
- An attached cover letter suggests that now is the time to buy based on the value this vendor claims to be able to provide and the extraordinary "one-time" incentives being offered based on their upcoming quarter close.
- Filed the unsolicited vendor bid in my "entertaining but not useful" file.

Mike stopped reading a moment, looked at his lunch, which was only half eaten. He was no longer hungry, at least not for cafeteria food. After reading that last entry, the thought of finishing his "blue plate" special seemed an impossible task. "Just like this project," he thought.

Dismayed by an ever-increasing sense of futility, Mike hurled the remains of his lunch into the trashcan. Two journal entries left and then he would then take a quick break for a "sugar fix." That's all he needed.

Day #42 - Forwarded email from John Topkins, Originally Sent by Jim Bowman

- Realize you are still only about $\frac{3}{4}$ through the "Phase 0" activities for our "Seize the Moment" eBusiness initiative.
- Would like to schedule a slot at our next staff meeting for you to give a brief (20-30 Minute) status update.
- Will assume you are in agreement.
- I will confirm the logistics within the week.

Mike then turned to his last page of notes.

Day #44 - Forwarded email from John Topkins, Originally Sent by Jim Bowman

- Meeting is confirmed one week from Monday.
- The team will expect a crisp update.
- Anticipate “challenging” questions from the leadership team.
- Let me know what I can do to help.

Mike looked up at the white board, the last two journal entries fresh in his mind. Reviewing all of his notes in one fell swoop had been beneficial because it allowed him to get a handle on everything that had happened over the last month-and-a-half. He felt he could see the big picture now.

“Well,” he sighed, “what next?” The answer, of course, was sugar, and with that sudden realization, he practically jumped to the door and headed for the vending machines. He knew he had yet to formalize his next steps, but he would do that after the candy bar. “I can still pull this off,” he thought. “Come on intuition! Come on perseverance! Any time now!”

Then he pulled the vending machine lever and watched a *Hershey Bar with Almonds* drop into the slot.

Trust But Verify...

“All right, let’s start from the beginning,” Kevin said quietly to himself as he jumped into the “account turnover” files for each of his four assigned accounts. Based on the collective depth of the files, Kevin knew this was most likely going to be a quick exercise. The first three folders contained information on his installed accounts. While the contents were thin, he was impressed with the fact that there appeared to be a standard “look and feel” in the way information was laid out. Within each folder, there was a brief company overview, a listing of the install base, upgrades scheduled to occur, known competitive threats, key contacts with a relationship assessment for each, a listing of all up-selling and support activities (letters, emails, meetings, etc.) for the past 90 days, and any known outstanding client satisfaction issues.

Having done his homework prior to accepting the position with ISAP, Kevin knew that its clients depended heavily on ISAP’s offerings once they were installed. This, in conjunction with the ever-expanding scope of eBusiness and Customer Relationship Management (CRM) initiatives, would be key considerations when putting together his account development plans. Kevin understood that a solid account development plan that served both the account and ISAP’s interests would be critical in order to grow the “year over year” install base of the accounts he served.

The fourth and last folder contained information on Kevin’s only prospect account. Or at least it was supposed to! While the other folders had some concise content, this folder was empty except for a single sheet of paper. There was a single sentence on the paper, written in bold capital letters:

SEE KEN GALLOWAY IF YOU HAVE ANY QUESTIONS!

Kevin closed his eyes and thought, “This ought to be interesting! All right, let’s go see Ken Galloway.” Kevin had heard Ken’s name during his orientation. What he recalled was that Ken was a senior sales representative and had been with ISAP for seven years. Prior to that he had worked for a nationally known database software company, and right after college he had worked for a mainframe hardware company on the West Coast. He was considered something of a loner, and yet by all accounts he was also a great entertainer. More importantly, he was extremely creative as far as “structuring” deals. From a performance perspective, except for this past year, he had always far exceeded his quota.

Kevin walked over to his team’s administrative assistant and asked where Ken was seated. Wayne looked up and said half-heartedly, “out back in the alley for all I care.” Realizing Kevin did not know how to react to his brand of office humor, he pointed to the other side of the large bullpen.

Kevin moved quickly through the cubicle patchwork towards Ken's desk but slowed when he saw Ken was having a heated phone discussion. It wasn't the right time. Later he could pick Ken's brain. But then he noticed the photos, pictures of Ken and twin engine airplanes and women in sunglasses. Actually the pictures all appeared to be of the same plane, and of course the same man, but the women were all different. Kevin wondered about the women, and then about Ken, and then the two made eye contact for a split second and Ken waved his hand in the air. "Right," Kevin thought to himself, he's too busy now. The moment Kevin turned from the desk, Ken slammed the phone down and said, "Hold on there, kid. I'll be with you in a minute."

Kevin took a seat opposite Ken, who was rummaging through a desk drawer.

"You're the new kid on the block." Ken said. He took out a notepad, scribbled a couple of notes and shoved the pad back in his desk drawer.

"Damn glad to have you on board," he continued, leveling his eyes at Kevin. "Now what can I do for you."

With that the two men started talking, though it was mostly Ken at first. Kevin listened with patient, studious attention while Ken talked about his previous achievements, what was wrong with ISAP, and how this was one of the toughest sales environments he had ever worked in. When Ken paused with his recitation, which was clearly not over, Kevin shifted somewhat abruptly to the subject of Morgan Industries (MI).

Ken looked at his watch, leaned back in his chair and smiled.

"Oh, so you're the one who got that lemon?" Ken looked up at the ceiling and continued talking. "Let me tell you kid, the supposed great opportunity at MI is anything but a real opportunity. Don't waste your time! I can assure you I tried just about everything to get something going before I asked them to take MI off my territory assignment list."

"They were on your territory assignment list then," Kevin repeated slowly, as if by repeating it slowly he could mask the concern he was beginning to feel inside.

"Yeah, up until about a week ago. I guess it was two weeks ago that I sent an unsolicited proposal to Mike Abernathy, our key contact, for his and MI's consideration. Despite my repeated phone calls to Mike and a few others in the organization, I never heard back. I put a very creative package on the table, and the fact that I never heard back from anyone at MI means, well, I'm sure they're just kicking tires kid. But hey, it's just the luck of the draw that the new kid would be assigned MI. What did you say your name was again?"

Keeping to himself a growing irritation with this "new kid hazing," Kevin asked if it would be possible to see a copy of the proposal Ken had sent to MI. Ken leaned forward without comment and shuffled through a large pile of assorted papers and magazines on his desk. Halfway through the pile he smiled and said, "Here!" and then pulled out a

stapled six-page document. “I doubt it will do you any good,” he continued, his smile becoming a symbol in Kevin’s eyes of smug ignorance.

“Is there anything else I should be looking at,” Kevin said.

“It’s all in the folder, kid.”

“Yes, the folder,” said Kevin. “Thanks for your insight Ken,” and with that Kevin stood quickly, with business-like precision, and extended his hand. Startled by this sudden gesture, Ken paused a moment, but then he offered Kevin a clammy, dead-fish hand in return.

“Let me know if I can do anything else to help you along while you get your footing at MI,” Ken said.

Kevin politely gave the man a thumbs-up gesture, but as he rounded the corner of Ken’s cubicle, he was thinking, “Thanks Ken, but I’m sure you’ve probably done more than enough already!”

Ten minutes later, Kevin was walking down the three flights of stairs from his desk to the lobby. He was heading outside, for a bit of “fresh air,” but he was brooding over the MI situation. He was still brooding as he walked out the front door and directly into the sunshine flashing brilliantly off the cars in the parking lot. Temporarily dazed, he almost walked into Marsha Lambert, his Vice-President of Sales and Marketing, who was entering the building.

“Good morning Kevin,” she said. “You seem lost in thought. How are things going so far?”

Kevin blinked a moment in the sunlight and regained his bearing.

“Well,” he began slowly. “For my tenth day with ISAP and my first official day on quota, I would say things are going pretty much as planned.”

“Is there anything I can do for you?” she asked.

“Well, it would be great to grab a quick lunch today, if you don’t have any plans,” Kevin said.

Marsha flipped open her handheld quickly to make sure she was available. Regaining eye contact with Kevin, she asked, “How about at 12:30?”

Without hesitation, Kevin said, “Sounds great! I’ll swing by your office at 12:30.”

The two parted, Kevin heading towards the walkway that wove itself around the office building to the pond in back, and Marsha heading inside towards the elevator. “That was a stroke of good luck,” Kevin thought to himself. And then he looked again at the flash-

ing brilliance of the sun and all of a sudden he was back at his interview with Marsha, prior to being offered and accepting a position with ISAP. Marsha had been the VP of Sales and Marketing for ISAP for the past four years. Like Kevin, she had had prior work experiences with one of the largest IT providers in the industry. She had started in customer service and moved into sales and ultimately sales management.

Kevin remembered his interview with Marsha quite explicitly. To the extent that he was the “offering,” it had not been one of his better sales calls. Marsha had led him into a discussion around sales process methods, and at one point he stated, “I believe a sales process is valuable if and only if a prospect or client would see value in using it.” He remembered his comment taking her back for a moment. Reading her body language, he backed off the point and redirected the conversation back to her to better understand the sales process currently in use within ISAP. He could see her energy rebound as she began walking through, in fairly specific details, the approach ISAP was using and the types of results ISAP had experienced over the past four years. Listening to her use of specific terms, it was clear to Kevin that ISAP had licensed a well-known third-party methodology and customized it to meet their explicit requirements.

Fortunately, Kevin had been previously trained to use the methodology and quickly aligned himself with Marsha by using the language she was very comfortable with. The interview continued and ended on a reasonably good note, but Kevin assumed that Marsha had been on the fence with respect to extending an offer. He was certain that the only reason he got the job was because his personal and client references had checked out and had aligned with Marsha’s genuine interest in providing the best client satisfaction possible.

“So, here we are!” he said out loud. He looked away from the sun and noticed the spectacularly vivid blue of the sky and began thinking of his first few days in ISAP’s new hire program. That was where he got an additional perspective regarding Marsha Lambert. He learned from the program facilitators that four years earlier, Marsha had championed the adoption, modification, and adherence to the third-party sales process methodology that had helped to form their discussion during the interview.

One of the facilitators went so far as to jokingly say, “Some folks around here refer to her as the process queen because of her tireless focus on making sure everyone adheres.”

Kevin’s first reaction, all labels aside, was that her efforts had served her and ISAP well. She was four for four at exceeding her annual sales plan. And with the possible exception of a few old “salty dogs,” she seemed to have had everyone adhering to ISAP’s sales approach.

Recognizing he only had about an hour prior to his lunch with Marsha, Kevin went back inside, ran up the stairs to the third floor and wound his way to his desk. He smiled as he settled into his chair and thought about the day before and how he had been lost among the cubicles and had to ask for directions to get back to his desk.

“There certainly is power in repetition,” he said, and smiled at the thought. Then he turned to the proposal Ken had offered to MI. It was a very creative “terms and conditions” attempt to try to get something going at MI. Fortunately, the creative terms and conditions were based on a very narrow scope. Kevin suspected strongly that Mike Abernathy had not valued the scope within the proposal and most certainly had not appreciated receiving it unasked for.

Kevin jotted down his remaining thoughts and then looked at his watch. 12:26! Grabbing his notepad and suit coat, he started quickly towards Marsha’s office. With any luck he would not have to ask anyone for directions!

Marsha was just finishing a call when he arrived and she immediately opened her desk, grabbed some money, and came around to greet him.

“Perfect timing,” she said, smiling, and then Kevin followed her to the corporate cafeteria. As they made their way through the “make your own” sandwich line, Marsha and Kevin engaged in the typical and expected “new hire” chatter, but by the time they sat down at a small gray cafeteria table, they were right back into the dialogue they had begun during Kevin’s initial interview.

“Have you had a chance to review the ISAP sales process?” she said.

Kevin had barely taken a bite of his tuna sandwich, swallowed with a look that reflected the sudden recognition that this was a working business lunch, and then stated that he had walked through it quickly. At first blush he had thought it looked very comprehensive.

“It is obvious that a lot of thought and energy went into taking an “off the shelf” recognized sales methodology and personalizing it to ISAP’s unique selling environment,” he said.

Marsha nodded knowingly. She had an ongoing non-stop need to police everyone’s continued use of ISAP’s sales approach, which is why her next question took Kevin back a bit.

“How do you think it compares to other sales process models you have used?”

Kevin understood she was looking for something, but just exactly what that something was he did not know. He needed a context for her question.

“I’d be happy to answer your question, but I am curious why you are asking.”

She jumped on his response with catlike quickness.

“You said during our initial interview that you believe a sales process is valuable if and only if a prospect or client would see value in using it,” she said. “I was intrigued by your idea then and I continue to be intrigued.”

“The way she was looking at Kevin suggested that she was truly interested in what he had to say. Recognizing that this was not the time or the place to go into details, he simply said that a previous client had introduced him to a framework and a set of supporting tools that had proved to be valuable in serving and selling other prospects and clients.”

“You say a client introduced you to a sales methodology,” she exclaimed.

“Actually, I’m not sure if it is a sales methodology or a buying methodology,” said Kevin. “The objective of the framework and supporting tools is to ensure the early-on and ongoing success of a business initiative or solution.”

Kevin could see Marsha’s eyes beginning to glaze over, so he stopped. He had not yet earned the right to have this conversation with Marsha, but he did not want to back off entirely. Instead, he offered to schedule some time, after he had planted his feet firmly in company soil, to share with her the framework and supporting tools.

Marsha paused for a moment to reflect and then said, “Given that our responsibilities around here are to make sure we meet our numbers and to keep our clients happy, I think you are probably right.”

With that, Kevin and Marsha agreed to meet some time in the next two to three weeks for an hour.

The rest of lunch sailed by quickly. Kevin listened attentively as Marsha shared her insights on what someone trying to get off to a fast start should know about ISAP. The more Kevin listened to her suggestions, the more he could see that she genuinely cared for the well-being of her sales organization. As he made his way back to his own desk, he knew that he would build a great working relationship with Marsha. By quickly demonstrating his ability to serve, and as result sell to his prospects and clients, he would win her confidence.

With newfound optimism, he reached for his notes regarding MI and the proposal sent by Ken Galloway. Kevin knew that the proposal Ken forwarded to Mike had not created the type of first impression that Kevin would have desired. Still, Ken had initiated a sales activity that required some type of formal follow-up. Armed with an initial call plan, and recognizing that there was no time like the present to begin working his plan, Kevin dialed Mike Abernathy’s phone number.

A Needle In A Haystack...

Mike returned from the vending machine and settled into his chair. His voice message light was flashing, so without thinking, he picked up his receiver and dialed in to get his messages.

He had three messages. The first message was from his fiancée, Brenda, reminding him that he needed to schedule an appointment to get fitted for his tuxedo. Her message ended with, “it is hard to believe that our wedding is only a month and half away, I love you honey!” He smiled as he jotted down a note, and proceeded to the second message.

The second message was from a headhunter. He listened to the message and then saved it. The headhunter suggested that a colleague within MI thought Mike might be interested in changing companies. “Great!” he thought, “Now one of my fellow workers is spreading the word that I may be looking for a new job.” His mind raced as he wondered if one of his peers was secretly doing things to position themselves as the new project lead for MI’s “Seize the Moment” eBusiness initiative. He shrugged and thought to himself, “You can have it!”

The third message was from Kevin Cooper of ISAP. His first reaction was to skip the message and delete it. But there was something in the man’s voice, the tone of it, which kept his finger off the button.

“Good afternoon Mike,” the message began. “My name is Kevin Cooper of ISAP. I have just replaced Ken Galloway as your account executive. I understand there have been a couple of correspondences between you and Ken. I believe the unsolicited proposal Ken provided was not of any interest to you based on your lack of subsequent correspondence.”

The message continued, “I understand from Ken, as a result of our account transfer session, that you are in the initial phase of understanding how an eBusiness initiative will best support the priorities of MI. I also understand that based on your assessment of how this initiative will support MI’s priorities, you then intend to determine the specific requirements for the initiative and the criteria for how you and other executives within MI will measure its ultimate success.”

That’ll be the trick, thought Mike, but he kept listening.

“I have had a number of clients, like you,” the message continued, “who have been responsible for the early-on and ongoing success of a business initiative. Almost, without exception, all of them have shared that the early phases of their business initiatives or solutions were often both the most difficult and most critical.”

Mike shifted in his seat.

“I have taken the liberty of forwarding, via email, a set of assessment questions which they used and found useful in working through the initial phase of their business initiatives or solutions. I hope the same proves true for you. Also in the email, I have provided all of my contact information. I look forward to connecting with you at your earliest convenience.”

As Mike deleted the message he said quietly to himself, “Well this guy can’t be worse than the last knucklehead ISAP assigned.” Mike then looked at the whiteboard covered with information and turned back to the task at hand. He had worked through a mountain of notes with the goal of coming up with a couple of key next steps, but the more he worked at it, the more frustrated he had become. “I seem to have more than enough information, but not nearly enough insight on what to do next.” Three straight hours without either interruption or success. Before he realized what time it was, his digital watch beeped and he looked to see 5:00 staring him in the face. “How can this be,” he thought.

The only thing Mike had to show for his earnest effort was a trash can full of balled-up pieces of note pad paper.

Mike realized he needed to stop for the day. A quick perusal through his email and Mike would be on his way to get fitted for a tuxedo. Mike opened his email and was met with twenty-five messages. “About par for the course,” he thought with regards to how many he typically gets on a daily basis. “Based on the typical junk, this should only take a couple of minutes to get through,” he thought as he started to plow through.

With two exceptions, all of the emails were either corporate news propaganda or internal CYA’s. The first exception was a request from Sue Jacobs to meet at his earliest convenience possible. “Now what?” Mike thought to himself. Mike made a note to call Sue first thing in the morning to schedule a time to meet.

The second exception was the promised email from Kevin Cooper of ISAP. When he first opened it, he expected to see another vendor advertisement making absurd claims. To his absolute surprise, the content and tone felt nothing at all like a sales pitch. Kevin Cooper’s message was very straightforward. He used simple words and demonstrated a believable sense of empathy. Most importantly, he cited individuals and companies where the attached document containing questions had proven helpful for ensuring their early-on and ongoing success with a business initiative or solution.

Kevin’s email suggested a three-pass approach to the attached document containing assessment questions. Specifically it said:

- For the initial pass, read the assessment questions from beginning to end and do not attempt to answer them.
- For the second pass, read the questions and highlight the ones that jump out as reasons for concern.
- For the final pass, take your best shot at answering all the questions.

- For the ones you previously highlighted, ensure you document what needs to occur to ensure that you can answer them confidently and accurately in the near future.

Mike launched the attached document from his screen and quickly scanned the list of questions. He was about to go through the entire list when he thought of his bride-to-be. It was now 5:30 and she wouldn't be happy if he postponed the tux fitting, so he hit print and left the questions for the morning.

Glad to call it a day, Mike grabbed his briefcase and coat and pulled his office door closed behind him, checking to ensure it was locked. While he walked down the hallway, he began to recognize he was getting a very faint sense of some new ideas. As he reached his car, he realized he was quietly saying to himself over and over, "failure is not an option, failure is not an option." While he could not put his finger on it yet, he smiled as he thought that his given talents of intuition and perseverance were getting ready to kick-in. As he pulled out of the parking lot, he hoped his re-emerging intuition was in fact re-emerging!

A Defining Moment...

“Day #46 and counting,” Mike said out loud to himself as he pulled into MI’s back parking lot. He grabbed his briefcase and coat and started running towards the employee entrance, attempting to dodge the falling rain. He made a beeline to the cafeteria for the first of two daily morning double café lattes.

As he was leaving the cafeteria to find the security of his office, he heard his name being called. He turned and saw Sue Jacobs walking towards him and smiled in a politically correct manner, wondering if Sue had perhaps been waiting for him. “You’re being paranoid,” Mike said quietly to himself as she intercepted him at the elevator.

“Hey Mike, did you get my email with regards to getting together as soon as possible?” she asked. Without waiting for a reply, she continued with, “how about sometime this afternoon or tomorrow morning?” As the elevator door opened, Mike said he would confirm a time as soon as he got to his office and checked his schedule. Mike stepped into the elevator. As the doors closed, he smiled and tipped his coffee.

Moments later, while attempting to balance his briefcase, a double café latte, and the documents he had sent to the printer from the previous day in one hand, Mike unlocked his office with his free hand and placed his belongings safely on his desk. Then he took off his coat and flung it onto a chair in the corner of his office. He closed the office door, a sign that he did not want to be interrupted, sat down at his desk and organized himself. He had barely taken a sip from his café latte before he had become absorbed in the document with the list of questions Kevin Cooper from ISAP had sent him.

Mike recalled the three-pass approach Kevin suggested. “What have I got to lose,” Mike said out loud. He read through the assessment questions quickly from beginning to end without pausing or reflecting. Then, as suggested, he read them again and highlighted the ones that jumped out as areas of concerns. After finishing this second pass, he counted the questions twice. The first time he counted to determine the total number of questions. The second time he counted the number he had highlighted. Fifty percent of the questions were highlighted in yellow.

Mike dropped the highlighter and took a sip from his cup. He felt himself smiling still despite the fact that he could only answer 7 of the 14 questions with confidence. Then he reread Kevin’s email, the one he had printed last night, the one that had accompanied the document containing the questions. He zeroed in on one sentence:

Individuals and companies found the attached assessment questions to be helpful as a part of ensuring their early-on and ongoing success with a business initiative or solution.

Mike realized now why he was smiling. Until this moment, he had not known the questions that needed to be asked and answered. Now he was beginning to feel as if a veil

was being lifted. He knew Kevin's list was not the complete set, but it was a step in the right direction. More confident still, Mike opened his journal to make an entry.

Day #46 Questions to Answer - Provided by Kevin Cooper of ISAP

- Kevin Cooper of ISAP provided the following assessment questions. Other project managers have apparently used these questions to ensure the early-on and on-going success of their business initiatives or solutions. Those marked with checks are the ones that I do not feel I can currently answer with confidence.
- What is the "business problem" this initiative/solution is trying to solve?
- ✓ How does addressing this business problem align to the priorities of the key categories (Organizational - RED, Operational - YELLOW, Infrastructure - GREEN) of stakeholders within the enterprise?
- ✓ Which categories of stakeholders are committed (sponsorship/ownership/funding) to the success of the initiative/solution?
- What is the priority of this initiative/solution as compared to others currently being considered or currently underway?
- Has the organization attempted an initiative/solution of similar scope?
- Has a formal plan (work scope, expected business outcomes, timelines, resource allocations, etc.) been developed for this initiative/solution?
- ✓ What are the backgrounds (tenure, previous experiences, recognized competencies, organizational acceptance) of the initiative/solution team?
- What are the odds of this initiative/solution delivering to intended expectations (business results, acceptable risk, timelines, budgets, etc.).
- Are there any political forces, preconceived ideas, or biases of what the recommendation should be?
- ✓ How will third parties (consultants, advisory services) be used during this initiative/solution's evaluation, recommendation, and implementation?
- ✓ What is the approval (formal, informal) process for approving an initiative/solution of this nature?
- ✓ Who must be involved to ensure the initial approval and successful implementation of this initiative/solution?
- ✓ How much time and resources have been allocated to bring forward a recommendation?
- In what format (executive briefing, business summary, feasibility study, supporting business case, detailed project plan, etc.) must the initiative/solution recommendation be presented?

Mike put down his pen, stood up from his desk, and walked over to his white board. As he looked at everything on the board, he was feeling confident that he had done a reasonably good job of answering fifty percent of the questions offered by Kevin. The

exercise he had just concluded was beginning to provide him with an intuitive sense of what he needed to do next.

He returned to his desk.

Looking at his calendar to view his availability for the day, he picked up the phone to confirm a time to meet with Sue later in the afternoon. He left a voice message saying that 3:00 to 4:00 this afternoon was a go and that he would consider it confirmed unless Sue indicated otherwise.

Then he clicked open his email and found twenty-three new messages waiting. “Yikes!” he said out loud. He looked at his watch, 8:30 in the morning, and couldn’t believe he already had more than twenty new messages since last night. As he dove into the messages, he shook his head in disbelief and thought to himself, “and this is supposed to be a productivity tool!”

True to form, only a couple of the emails proved to be of substance. The first was from John Topkins asking for two hours from 10 a.m.-12 p.m. the following Monday to meet and review the progress for the “Seize the Moment” initiative. Mike accepted the invitation with a click of the mouse. He was sort of relieved that despite John’s earlier request for Mike to schedule the time, John himself had taken control to set up the meeting.

The second email was from Kevin Cooper. “Now the vendor pitch!” Mike thought as he opened the email from Kevin. Once again, the content and tone felt nothing at all like a sales pitch. The first paragraph started with a reference to the previous email he had sent with the thought that he hoped the questions are or would prove useful.

The email then introduced the idea that a business initiative or solution, such as the eBusiness initiative being considered by MI, would take one of two paths. The first path is the “Fast Path” and the second or alternative path is falling into “The Gap.” The difference between the two paths was the amount of time used to achieve progress or complete the initiative/solution.

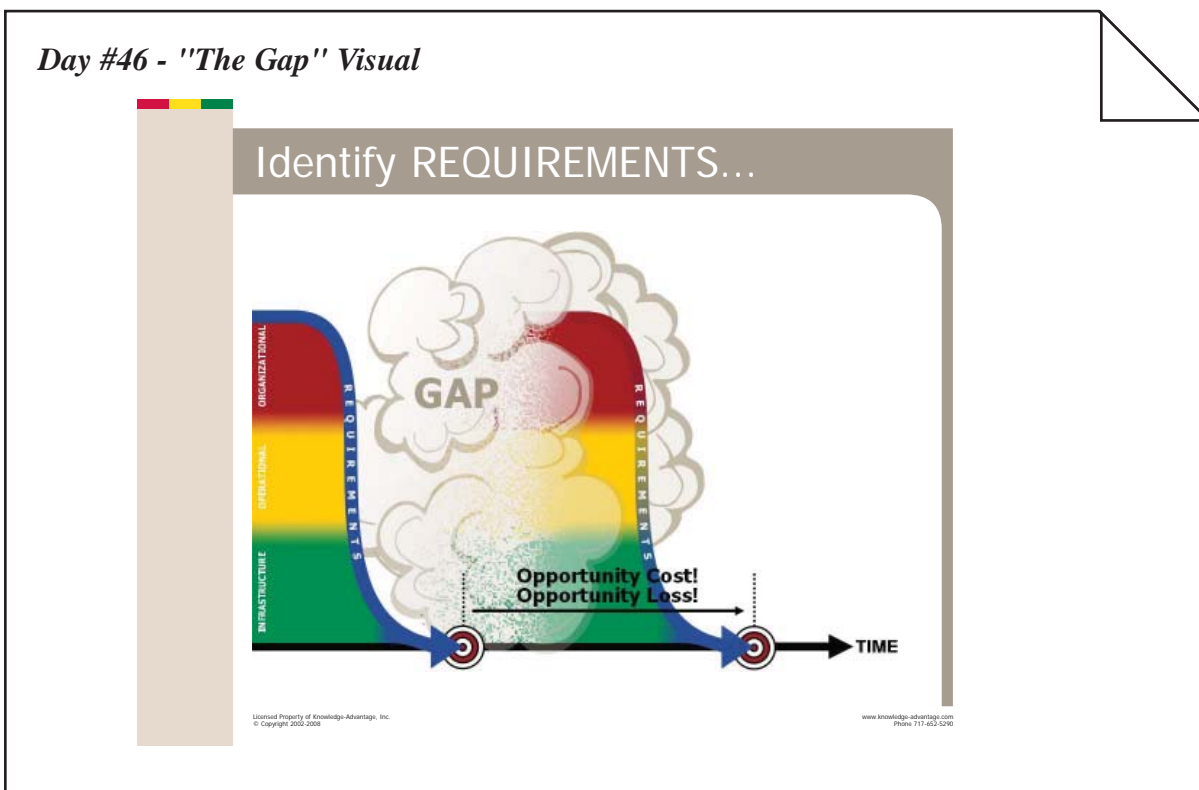
The email continued with a simple explanation of this idea of “The Gap.” When a business initiative or solution fell into “The Gap,” it simply meant that more time than necessary was being spent to either advance or complete the initiative/solution. When this happened, opportunity cost (cost of the solution) and opportunity loss (delay in the realization of the intended value) went up. The email underscored the fact that both opportunity cost and opportunity loss had a monetary consequence to a business initiative or solution.

The email then made reference to the questions that Kevin had previously forwarded. He went on to suggest that when the questions can be answered accurately and with confidence, the odds of a business initiative or solution staying on the “Fast Path” are greatly enhanced. He also cautioned that the opposite was true. When the questions

could not be answered or when there was little confidence in the answers, the odds of falling into “The Gap” increased.

There was also an attached file, which Kevin suggested could be used as a means to convey the concept of the “Fast Path” and “The Gap.” He concluded the email with the statement that many of his previous clients had used the questions together with “The Gap” visual to facilitate a collaborative dialogue with their respective peers as a means to further ensure the early-on and ongoing success of initiatives or solutions.

Mike double clicked the attached file and a colorful graphic filled his computer screen. “Of course,” Mike thought. “How common sense.” Even without Kevin’s explanation the meaning of the graphic was clear. Mike sent the file to the color print queue and then looked at his watch. “Perfect timing,” he thought, which meant that it was time for a quick trip to the cafeteria for his midmorning double café latte. He’d pick up the printed graphic on his way back. Mike returned to his office within 10 minutes, a double café latte in one hand and the graphic in the other. He sat down, opened his journal, took another look at the graphic, made a short notation and taped the graphic beneath the heading.



Mike studied both the questions he had previously highlighted and the picture he had just taped into his journal. Clearly, the combination of the questions and the visual resonated with where Mike found himself. He was intuitively struggling with how to stay on the “Fast Path” and avoid falling into “The Gap.”

Mike opened his journal to make an entry as he began to plan the specifics for his meeting with Sue Jacobs at 3:00.

Day #46 - Next Steps

- Solution is at risk of taking more time than necessary to progress and ultimately be completed.
- A vendor (ISAP) provided a list of diagnostic questions that at a minimum provides guidance to the types of questions that need to be answered by all involved.
- Also provided a picture that visualizes the potential rewards and risks based on the accuracy and confidence of the answers to the questions.
- Not sure of the vendor's angle, but at this point do not really care.
- Will attempt to earnestly answer the questions based on what I know as of now regarding the "Seize the Moment" eBusiness initiative.
- Plan to share the visual along with the questions and my responses with Sue at today's meeting.
- Intend to make it clear that there are specific questions that I cannot currently answer.
- Will solicit Sue's involvement to work together to help answer the questions.
- The outcome of the meeting will determine my next steps.

Mike looked at his watch, 10:45 a.m. He was beginning to feel confident once again about the future of this solution and with this confidence he could feel a building sense of excitement. He believed that because of his re-emerging intuition and with some perseverance over the next four hours, he would be in a position to successfully facilitate a meeting with Sue. To this end, he had one objective. He wanted to ensure that he and Sue were aligned and committed with respect to what must occur to ensure their early-on and ongoing mutual success with MI's "Seize the Moment" eBusiness initiative.

Four hours later, Mike put the finishing touches on what he thought of as his new "game plan." He was very pleased. For the first time in he couldn't say how long he felt he had a definitive next step that would benefit all parties involved. Mike put together a folder with an extra copy of everything he had been working on, a folder he planned to leave with Sue. Then he looked at his watch, assembled his belongings, and headed for his meeting.

He arrived at Sue's office at 2:58. Sue's assistant, Nancy, was not at her desk, so Mike sat down in a Scandinavian style chair, one of several that adorned Sue's ultra modern office space. "It is always great to be a few minutes early," Mike said quietly to himself.

Two minutes later Sue's office door flew open and her assistant Nancy returned to her duties. "Go ahead Mike," she said. "Sue is expecting you."

Mike was met with a politically correct, "Hi, Mike. How are you?"

The insincerity of Sue's concern for his well-being was obvious, but Mike took her indifference in stride.

"I'm fine, thanks," said Mike. "I trust all is well with you."

Sue nodded mechanically, her attention divided between an email on her computer and Mike walking across the room. As Mike sat down on her couch, he realized that the first couple of minutes here would make or break this meeting and the subsequent next steps. Then Sue clicked out of her email and moved from her desk to the accompanying chair to the left of the sofa and sat down. She did not look him squarely in the eye, at least that's how it seemed to Mike. It was more like she was looking past him. Mike knew he needed to make a quick and decisive first move.

Leaning forward, he said, "Sue, I know you have a high level of frustration with regards to the "Seize the Moment" initiative. I apologize and share some of your frustrations." He did not wait for a reply. "You and I have been asked to collaborate to determine the best way for MI to capitalize on this effort. Frankly, I do not believe either of us can be successful with regards to our involvement with this initiative unless we get some additional direction from other key members of the executive team within MI."

Sue nodded with some degree of impatience and Mike continued. "I have a plan I would like to review with you. If you are in agreement with the plan, I will ask for your active involvement to work it out together for the interests of all involved."

Mike could see that his opening comments had a positive initial impact on Sue. He also knew this impact would be temporary if he did not quickly follow up with something additional.

Sue looked at Mike for a few seconds, gathering her thoughts. She then said in a detached and deliberate manner, "Mike, I appreciate your candor, and you are correct, I am very frustrated with this initiative, especially in light of our current and expected sales performance for the next six months. As I said before, what matters most around here are the numbers. Frankly, it may very well be in everyone's best interests to let this initiative fade away and allow all of us to get back to the real business at hand."

Mike wondered if Sue was correct, but he also thought that the payoff of the "Seize the Moment" initiative was tremendous. "Sue, you may be right, but I believe we can do more on our part before we draw that conclusion."

"Well, you said you have a plan, let's hear it!" Sue responded.

Mike reached for the folder he had brought and pulled out the “The Gap” visual. He then proceeded to take less than a minute to quickly walk through the idea of the two paths an initiative can take and the payoffs and consequences to be realized based on the respective path. Sue looked at the visual and then looked at Mike. “Well it’s obvious that either we are in ‘The Gap’ or on the fault line of falling into ‘The Gap.’ So what are you recommending?” She responded without emotion.

Mike nodded in silent agreement and pulled out a clean copy of the original assessment questions Kevin had sent, his own version with the questions he felt raised concerns highlighted in yellow, and his own earnest attempt to answer all the questions as best he could. As he handed over both the questions and his responses, Mike said, “What I am sharing with you is a set of questions that have been used by folks like you and me in other organizations as they are trying to ensure a business initiative or solution like our “Seize the Moment” gets off to a fast start and stays on the “Fast Path.”

A look of curiosity spread across Sue’s face. She spent five minutes in cursory review, paging through both the questions and responses three times. Then she looked up at Mike, a degree of uncertainty in her voice, but also expectation.

“So tell me again what you are expecting from me?” Sue asked.

Mike paused for a moment to collect his composure.

“I would first like to know what you think about my responses to the questions,” he said.

“I agree for the most part with everything you wrote,” Sue said. “And I think it is absolutely clear that to fully answer the questions you highlighted will need a good deal of work before anyone within MI would be satisfied that they had been answered.”

“Exactly!” Mike could feel the excitement he had felt earlier that day beginning to build again. Finally, they were going to get somewhere, he thought, but not too fast, stay calm. Taking a deep breath to steady himself, he looked squarely at Sue.

“Sue, I would suggest that you and I need to get explicit guidance from John, Jim, Doug, and possibly others within MI with regards to the questions I highlighted. If we could get both their insight and agreement, I believe we could further ensure that the “Seize the Moment” initiative gets back on the “Fast Path.”

“Okay, Mike. I see where you’re going,” said Sue. “Let’s assume for the moment that I am in agreement with what you are suggesting. What exactly would you recommend we do next?”

Mike took his time with this one, gauging each word with the precision of a diamond cutter. “To be honest, Sue, I am still formulating that in my head. But I knew, since we have been asked to work collaboratively on this for the best interests of MI, that I had to get your agreement first before I could finalize a next step. If we are in agreement, I will schedule time with John. My agenda for John will include updating him on where I

think we are with regards to needing guidance to ensure we keep the “Seize the Moment” eBusiness initiative on the "Fast Path." Then, I thought I would replay our conversation today, review our collective responses to the questions, and ask him for his direct assistance to get clarity about the questions we cannot currently answer clearly with confidence.”

Sue contemplated everything Mike said, the room descending into thoughtful silence for several minutes. Mike was anxious, apprehensive. This was the moment of truth, at least as far as regrouping and keeping the “Seize the Moment” initiative alive.

“What do you think?” Mike ventured cautiously.

Sue blinked sharply several times and then her features softened. “Under the circumstances, Mike, I don’t see a more efficient alternative. Let’s move on it.”

With that, Mike asked Sue to review the questions and his responses again and to add or refine wherever she felt it appropriate. Sue agreed that she would forward any additions or changes within the next 24 hours. Mike could see from the look in her eyes that he had, at least temporarily, re-engaged Sue.

Then the meeting was over and Mike headed back to his office. The meeting had been a small but significant success, and he wanted to document the progress they had made while the memory of this mini-triumph was still fresh in his mind.

Day #46 - Meeting with Sue Jacobs

- Time with Sue appeared to “buy time” to try to regroup.
- Used a couple of tools (visual, list of questions) to facilitate the dialogue.
- As suggested by the individual who provided the tools (Kevin Cooper, ISAP), the tools allowed us to focus on the problem at hand, as opposed to each of us focusing on the other as if they were the problem.
- Sue reviewed and with very little exception, agreed with my assessment and next steps.
- She committed to forwarding any revisions to my initial responses to the assessment questions within the next 24 hours.
- It was agreed to move swiftly to meet with John and to his seek guidance on how best to proceed with Jim, Doug, and other key executives within MI.

Mike looked up at the wall as he finished his entry. His mind was racing, which felt good for a change. He reflected on the anxiety he had felt only a couple of days ago and compared that anxiety to the temporarily restored confidence he felt now. Cherishing the moment, he decided to make one more entry in his journal.

Day #46 - Kevin Cooper of ISAP

- While I have not met him, what he provided without request is proving helpful.
- Compared to other vendors, his approach is different.
- Cannot figure out his angle, but I am sure he will show his true colors soon enough.
- Stay tuned!

Plan To Succeed...

Kevin looked at his watch. It was 4:45, the end of the day, but Kevin showed no signs of slowing down. “Almost my second full day on quota,” Kevin said. “But I’ve got miles to go before I sleep.” The notion of having miles to go before he slept came from a Robert Frost poem. He remembered it from a college poetry class. When he read the line, he adopted it as a mantra. It was his mantra for success; it kept him going. “Miles to go before I sleep,” he said to himself again, and he smiled. Then he returned to the pages of his notebook to review the steps he had taken and those he planned to take as he was trying to earn the right to meet with Mike and, eventually, other key executives within MI.

Day #2 - Plan for MI

- Need to provide multiple ways to demonstrate value quickly.
- Best way to overcome any baggage is to focus exclusively on MI's interests.
- Unable to sell what ISAP offers until MI knows what they need to buy.
- Will attempt to introduce a framework with supporting tools, that was provided to me from a previous client.
- The framework and supporting tools have helped a number of other clients.
- In almost all situations the framework and supporting tools have assisted them with the early-on and ongoing success of their initiatives or solutions.
- Sent yesterday “The Gap” visual and supporting Assessment Questions to Mike Abernathy.
- Will send via email the *Dimensions of Success* framework to Mike with supporting explanation at end of day today.
- Goal is to meet with Mike before the end of week, worst case first thing next week.

With an even clearer sense now of what he was doing, Kevin set about putting together additional information for Mike to review. Fifteen minutes later, he had a new email with an attachment ready to go. “Miles and miles and miles to go,” Kevin said quietly, and then he clicked his mouse and the email was on its way.

Why... What... How...

Mike was once again on the move. “I have tomorrow and Friday,” he thought to himself, “to ensure I am fully prepared for my meeting with John on Monday. Feeling good about his small accomplishment with Sue, he decided to do a little housekeeping and then end his day a little early. In return he vowed he would be in the office at his desk with his double café latte no later than 7:30 the next morning.

As usual, the emails had piled up quickly during the course of the day. He scanned the headers of the emails and deleted all but three, and of these, he quickly handled two requiring his review and comment. The remaining email was from Kevin Cooper of ISAP.

Mike shook his head and thought of the journal entry he had made a few minutes earlier. “I bet this is where I begin to see his true colors!”

The email began, as before, hoping that what he had previously sent was proving useful. Mike nodded and continued reading. He was certain that he was about to get the evidence he needed to prove that Kevin, albeit more clever than most, was just a fox in sheep’s clothing. To Mike’s chagrin, he was disappointed yet pleased by what he read.

Kevin’s email built on the notion of “The Fast Path” and the assessment questions he had previously sent. He introduced a framework he called the *Dimensions of Success* and said that many of his previous clients had used this framework to ensure the early-on and on-going success of their initiatives or solutions. Kevin stated that his previous clients recognized three fundamental dimensions that are critical to always keep in mind when considering a business initiative or solution. He labeled the three dimensions, “Priorities,” “Requirements,” and “Criteria.”

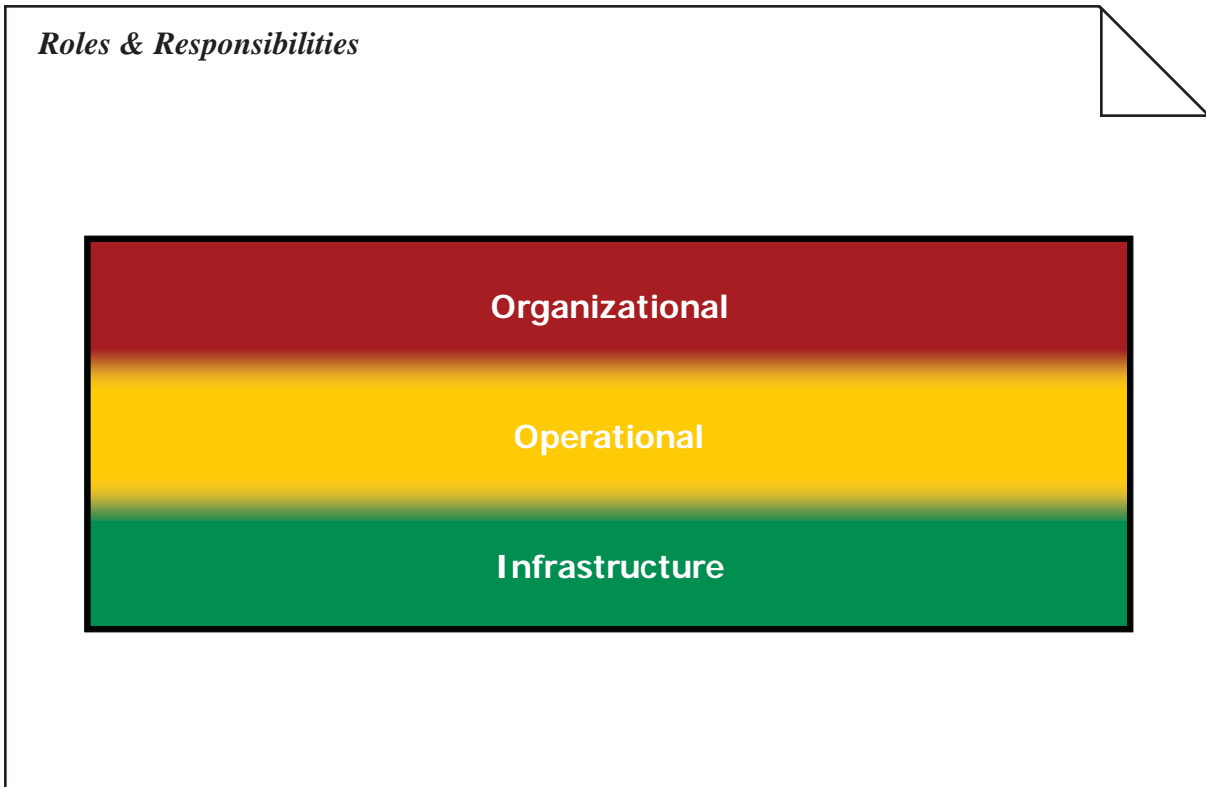
Kevin then suggested that the degree of success a business initiative or solution would realize was based on how well it fit within these three dimensions (priorities, requirements, criteria). He illustrated his point by suggesting that stakeholders needed to know what the specific requirements for an initiative were. They also needed to know why they should support an initiative with respect to the priorities of their company. Finally, they needed to determine the criteria for how they would measure the success of the initiative.

To the extent the Priorities, Requirements, and Criteria were made explicit and communicated to all parties involved, the degree of success for a business initiative or solution dramatically increased.

Building on the *Dimensions of Success* framework, Kevin stated that stakeholders, based on their roles and responsibilities within a company, could be segmented into one of

three categories. Kevin's email instructed to double click on the first of two attached files. Mike followed the instruction and was presented with a visual.

Organizational
Operational
Infrastructure



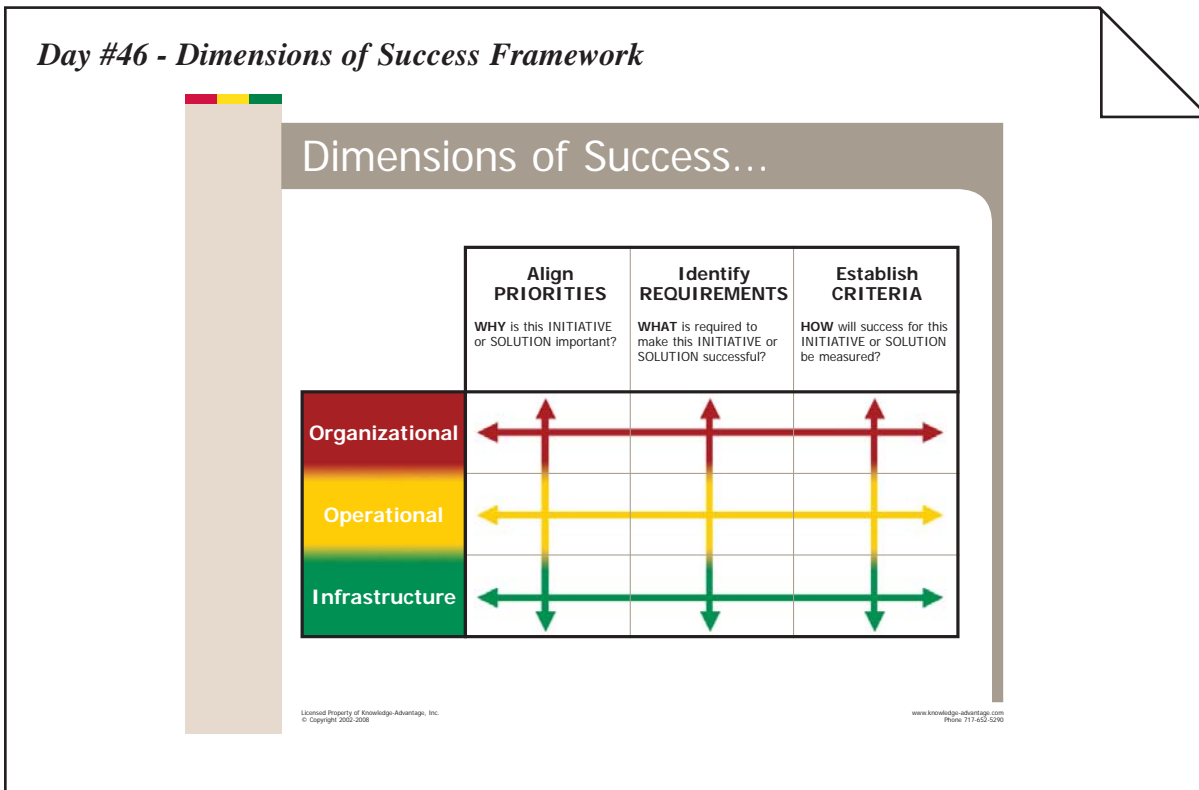
Kevin's point was that in spite of the fact that stakeholders from these three categories (Organizational, Operational, Infrastructure) needed to work together on a regular basis, they typically communicated in different languages. This was significant. Lacking a protocol converter to bring the different languages together to a common understanding ultimately contributed to initiatives or solutions failing to deliver their expected outcomes. It was this inability to efficiently communicate, Kevin explained, that had often caused business initiatives or solutions to fall off the "Fast Path" and into that nebulous cloud called "The Gap."

Kevin then indicated that "The Assessment Questions" he had previously sent were intended to assist with validating the requirements dimension. He also said that he had additional tools that could be used to assist with identifying and validating the priorities and criteria dimensions.

Finally, in his closing paragraph, he said that he had included a second attached file, a visual that should prove useful in bringing the *Dimensions of Success* framework to life.

He then concluded with an invitation to meet to review how the *Dimensions of Success* framework and supporting tools might be used to help Mike facilitate the early-on and on-going efforts surrounding MI's eBusiness initiative.

Mike double clicked the second file. The visual was both simple and intuitive, and Mike soon held a printed copy in his hand. He thought about the information this vendor had provided, still unsure what the guy's angle was. But it was useful information. He taped the visual into his journal and looked at it a second time.



Mike turned the page and jotted down a few additional thoughts.

Day #46 - Kevin Cooper of ISAP

- It is now obvious that Kevin Cooper, on his terms, is unfolding a set of tools that he has used with his previous clients.
- Despite the fact that it is on his terms, what he has offered thus far is proving beneficial.
- At face value, the *Dimensions of Success* framework he described is straightforward.
- Consistent with my meeting with Sue, I can see how the *Dimension of Success* framework could be used to facilitate my dialog with John.

- I am going to attempt to meet with Kevin tomorrow or Friday to learn more.
- To the extent he provides tools which prove helpful, it makes up for the dust and noise created by his predecessor.
- I will keep him at arm's length based on my previous experiences with vendors.

Mike looked at the visual a third time. It seemed unlikely that this vendor was on the up and up. But then again, maybe he was. And Mike wanted more information. He needed more information. And this vendor, Kevin, was the source. Mike rescanned the email Kevin had sent, located his phone number, and picked up the phone. He looked at his watch as he dialed. "It's 4:15," he said out loud. "Probably out on the links!"

But Kevin was not out on the links. The phone rang only twice, to Mike's surprise, and then he heard, "Good afternoon, this is Kevin Cooper."

There was a brief moment of silence, and then Mike responded.

"Good Afternoon Kevin, this is Mike Abernathy of MI."

"It is a pleasure to talk live," said Kevin. "How can I be of assistance to you?" There was no hesitation in his voice.

Mike paused again, and then said, "I would like to meet for fifteen minutes or so to explore further the materials you forwarded for my review."

"It would be a pleasure. When is convenient for you?"

Mike was surprised by the question.

"How about 11:30 tomorrow?" Mike said.

"Sounds like a plan," said Kevin. "I'll ring you at 11:30 from MI's visitor's lobby. Is there anything I can do for you in the interim?"

Mike was not used to this kind of service-oriented approach from a vendor. "No, nothing at this time," he said rather quickly, almost too quickly, but then he had been caught off guard. "I'll look for your call tomorrow at 11:30 from our visitor's lobby."

Mike hung up the phone.

It was time to call it a day so Mike decided to check his voicemail from his mobile on the way home. Satisfied that things were getting back on track, he powered down his laptop, packed his briefcase, grabbed his coat, hit the lights, and made sure the door was locked behind him.

He spent twenty minutes of the thirty-minute drive to his fiancée's home listening to voice messages. One was from Sue Jacobs. She had called to once again acknowledge her support and to say that she had already forwarded her revisions and additions via internal mail. Then he was pulling into Brenda's driveway. He turned off his mobile and stepped out of the car, smiling. "Yes, Mike old boy, you truly have a lot to be grateful for, both personally and professionally!" It certainly was amazing what a difference a day could make. Mike was genuinely excited as he walked to Brenda's front door and rang the doorbell. A moment later, she had wrapped her arms around him and was giving him the kind of kiss almost only seen in the movies.

He knew he was the luckiest person alive.

One Small Step...

As Kevin hung up the phone, he gave himself a virtual high five. He was very pleased with the fact that he would have a chance to meet with Mike tomorrow, though he had hoped for a little more time. Still he was grateful for the chance to meet face-to-face.

Replaying in his mind the brief and efficient conversation he had with Mike, he couldn't help but smile. Mike's tone and comments made it clear that he was only meeting to learn more about the *Dimensions of Success* framework and supporting tools. He was not interested at this point in what ISAP might be able to offer. Kevin's smile broadened. "Remember, Kevin," he said out loud, "you have to give to get."

With that he turned to his notebook to update his plan.

Day #2 - Plan for MI (Updated)

- Confirmed a time to meet with Mike tomorrow at 11:30.
- My single objective is to raise Mike's initial confidence in his ability to trust me both personally and professionally. Once I do this, the business relationship between ISAP and MI will follow.
- Plan to use the *Dimensions of Success* framework and supporting tools as an approach to demonstrate potential value to Mike. Hopefully Mike will see how he can create value using the same approach with his internal clients.
- Will use supporting tools to provide explicit "straw man" examples based on my current understanding of MI's eBusiness initiative.
- Want to ensure Mike understands how previous clients used the *Dimensions of Success* framework and supporting tools early-on and on an ongoing basis to support their business initiatives or solutions.
- Will leave behind client references for his review and use.

Kevin closed his notebook and returned to the conference table located in the middle of the bullpen area. The table was covered with papers. "All right," he said, "back to work. Miles to go, remember? You have to visualize and document your plan for supporting and growing the relationship between ISAP and MI."

First Impressions...

At precisely 11:30 a.m. the phone rang. Mike noted the time with approval. “At least he is punctual,” Mike said to himself, and then, “This is Mike,” into the receiver.

“Good morning Mike, this is Kevin Cooper, I am in your lobby for our 11:30 appointment.”

“Hello Kevin.” Mike responded with a detached tone. “Give me just a minute to wrap up what I am working on and I’ll be right down.”

“Sounds good,” Kevin said.

Mike had been at his desk, a double café latte in hand, since 7:25 a.m. that morning. He had worked without interruption for four hours. Pleased with his progress, he still knew he had a lot to get done before Monday’s session with John. He had been so busy that morning, so focused on the solution, that he had forgotten about his mid-morning latte dose, a fact which he only realized as headed down the hall towards the visitor’s lobby. The coffee could wait a minute, he thought. He’d pick up Kevin in the visitor’s lobby first and then swing back by the cafeteria. Besides, vendors almost always offered to pick up the tab, especially for something like a coffee. Mike figured he would probably get a free cup.

Entering the visitor’s lobby, Mike saw an individual in a conservative gabardine suit watching a television near the security guard’s circular information station. The television featured a never-ending stream of news about MI. Mike assumed the individual in the gabardine suit was Kevin Cooper. Kevin, for his part, was fascinated by the MI news channel, but he was not so fascinated that he did not notice an individual wearing a pair of khakis and a denim shirt walking towards him. Kevin assumed it was Mike Abernathy. The two men met in the middle of the lobby and shook hands.

“It is truly a pleasure to meet you Mike,” Kevin said enthusiastically.

Mike responded warmly, but calmly.

“It is a pleasure to meet you,” he said. Then he turned to the security guard and requested a visitor’s badge for Kevin to wear while he was on MI’s premises. Moments later, Mike and Kevin were walking down the main corridor towards the cafeteria.

When they passed the cafeteria entrance, Mike said he wanted to get a cup of coffee. Kevin nodded politely.

“Where should I wait while you go through the line?”

Mike pointed to the exit sign on the far side of the seating area,

“Great, I’ll meet you there,” said Kevin.

“So much for a free cup of coffee,” Mike thought to himself. Then he headed for the line, a little surprised and even embarrassed by the assumptions he had made about Kevin. This vendor was constantly surprising him.

Five minutes later the two men entered Mike’s office.

“You can use the chair there in the corner,” said Mike. “Just put my coat on the credenza. Right next to the white board.”

Kevin grabbed the balled-up coat and carefully laid it flat across the top of the credenza. As he sat down in the chair he was looking at Mike to his left and a white board full of notes to his right. A quick scan of the white board and Kevin could see immediately that its contents were specific to MI’s eBusiness initiative. Realizing the confidential nature of the white board’s contents, Kevin turned his chair to the left, making it very difficult for him to see the white board. Watching Kevin adjust his chair, Mike made a mental note that Kevin was attempting to respect the confidential nature of the contents on the white board by removing it from his line of sight.

As Mike settled into his chair, Kevin reached into his briefcase and pulled out a neat bundle of materials, which he placed on the floor by the side of his chair, and a notepad. As he opened up his notepad he looked up at Mike, who was sitting patiently, with an air of noncommittal reservation about him.

“How can I try to be of help today?” said Kevin.

Mike leaned forward and spoke with carefully chosen words.

“Kevin, let me begin by saying that I have significant reservations about meeting with you. The sales representative you replaced, like most reps, left a very bad taste in my mouth. He clearly had only his own interests in mind. In fact, I am still doing a bit of damage control as a result of his attempts at trying to reach a number of executives within MI.”

Kevin responded, “Well, first of all, on behalf of ISAP, I apologize for any inconvenience Ken’s actions caused you and others within MI.” His response had a tone of earnest sincerity.

Mike nodded, and Kevin continued.

“I also realize that in spite of your past experience with ISAP, you wanted to meet today.”

Mike paused. “Well, Kevin that is my dilemma. On one hand, I have a low level of confidence that ISAP and its employees can be trusted. On the other hand, what you have forwarded to me has proven timely with regards to MI’s eBusiness initiative.”

Kevin without hesitation replied, “Given the history you describe, I suggest you limit your level of disclosure until you feel comfortable that I have your best interests in mind.”

Mike paused again, nodded, and then opened his journal, placing it squarely in the middle of his desk. He then reached into a manila folder and pulled out a list of notes and questions. Looking at the questions he seemed lost in thought for a moment. Then he turned his attention to Kevin.

“You mentioned you have additional tools to help identify and assist with the priorities and criteria dimensions within the *Dimensions of Success* framework. What exactly are these tools?”

Kevin reached for the bundle of materials by his feet.

“Which would you like to start with, priorities or criteria?”

Mike scanned his notes and wondered how much they could cover. It was already 11:40 a.m.

“Let’s start with priorities.”

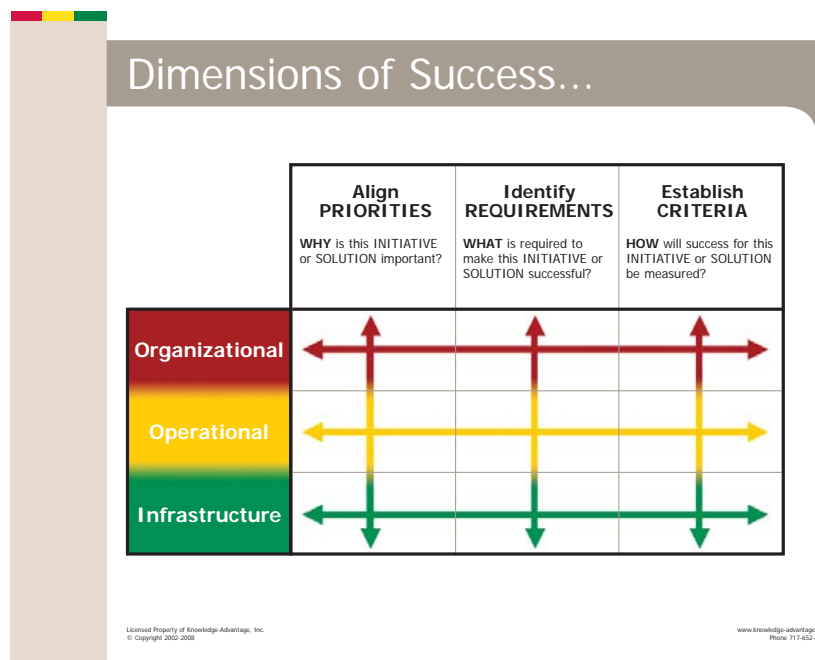
At 1:15 p.m., Mike and Kevin headed down to the visitor’s lobby. “I’ll give you a call Monday after my meeting with John,” Mike said as they approached the security desk. Kevin nodded politely and then the two men shook hands and exchanged farewells mutually acknowledging the value of their time together. Fifteen minutes later Mike was back in his office. He could hardly contain himself. The past 90 minutes had truly proven to be very valuable for him in light of his approaching meeting with John on Monday. He walked over to the window behind his desk and looked out at the bright blue sky and the sunshine bouncing off the cars in the parking lot below and he thought again about everything Kevin had said. The information he had provided was going to be very helpful indeed. Then he turned from the window and sat down at his desk and reviewed the notes he had made during his meeting with Kevin.

Day #47 - Meeting with Kevin Cooper

Dimensions of Success Framework and Supporting Tools

- There are three key dimensions (Align PRIORITIES, Identify REQUIREMENTS, Establish CRITERIA) within the *Dimensions of Success* framework.

- The degree of success for a business initiative or solution is a function of how well each dimension (Align PRIORITIES, Identify REQUIREMENTS, Establish CRITERIA) is explicitly defined, agreed to, and articulated to all stakeholders involved.
- Colors are used as a means to define roles and responsibilities for key stakeholders within a company (Organizational - RED, Operational - YELLOW, Infrastructure - GREEN).

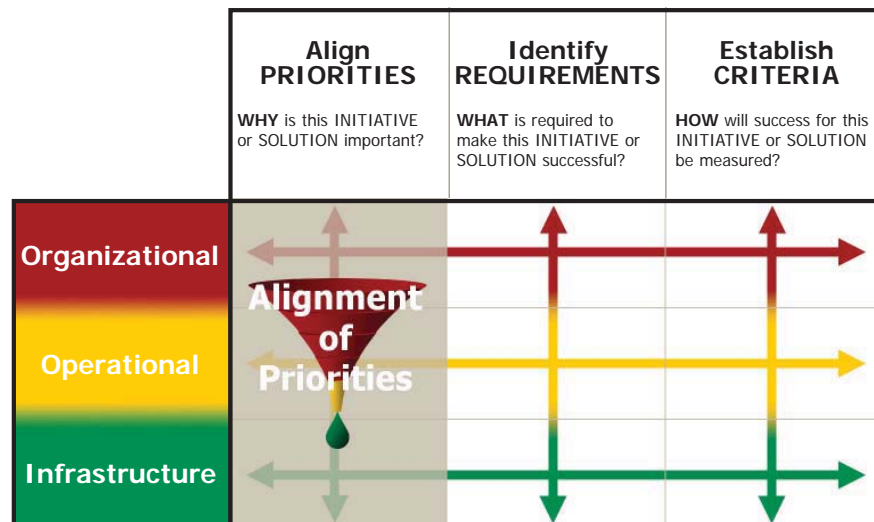


- Stakeholders within a company are often faced with the challenge of communicating effectively among themselves even though they are all part of the same team.
- A major contributing factor to this communication challenge is the fact that individuals learn to speak their own language based on their respective responsibilities. For example, CFO's are more comfortable with the language of Balance Sheets and Income Statements, while CIO's are most comfortable with the language of IT infrastructure.
- The *Dimensions of Success* framework with its supporting tools serves as a protocol converter to help a team of individuals with their respective interests get on and stay on the same page with regards to a business initiative or solution.

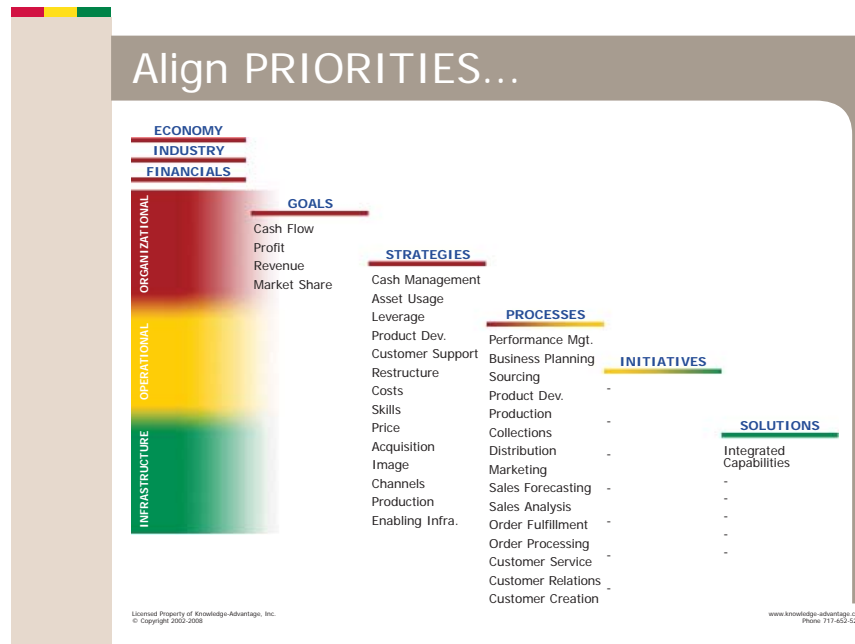
Align PRIORITIES

- Presented with a tool called the Alignment of Priorities (AoP).
- AoP supports the **priorities** dimension within the *Dimensions of Success* framework.
 - identifies three planning systems (Organizational, Operational, Infrastructure).
 - makes sure the outputs of the three plans are aligned with each other and with the business initiatives or solutions being implemented or considered for implementation.

- has the ability to easily generate explicit and visual scenarios that show the alignment of priorities to the business initiatives or solutions of the company.

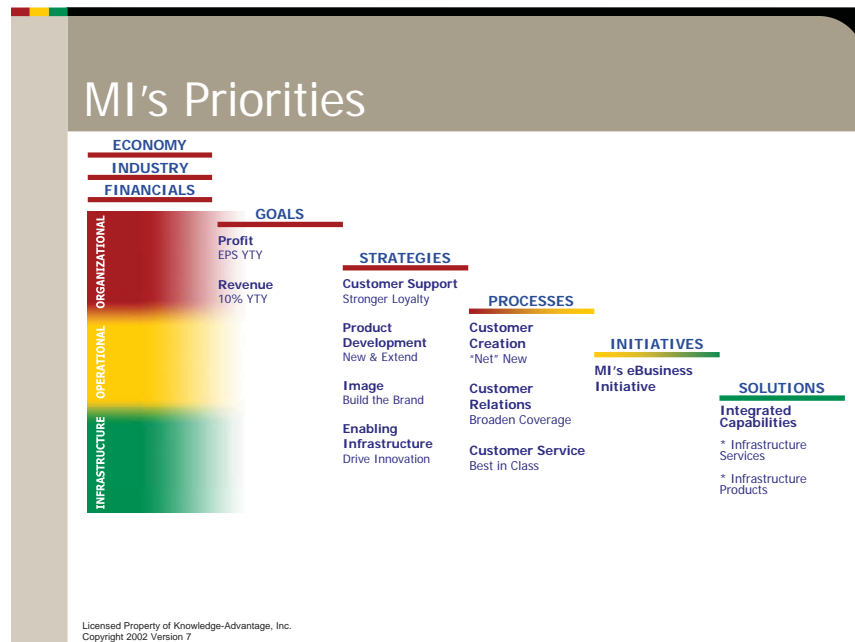


- The Alignment of Priorities starts macro (economy) and goes micro (solution).
- Colors (Red, Yellow, Green) represent key stakeholders that drive and determine Organizational, Operational, and Infrastructure priorities.
- The Alignment of Priorities facilitates a process to get members of a team on the same page (aligned) with regards to a business initiative or solution.
- The Alignment of Priorities gets people on the same page and is intended to keep them on the same page (quick visual reference).
- The Alignment of Priorities is a simple visual intended to display the Organizational, Operational, and Infrastructure priorities and how they are aligned to an individual or group of business initiatives or solutions on a single sheet of paper.



- Kevin presented an Alignment of Priorities for MI's eBusiness initiative based on using the publicly available sources of information (MI's annual report, quarterly filings, etc.).

Alignment of Priorities for MI's eBusiness Initiative

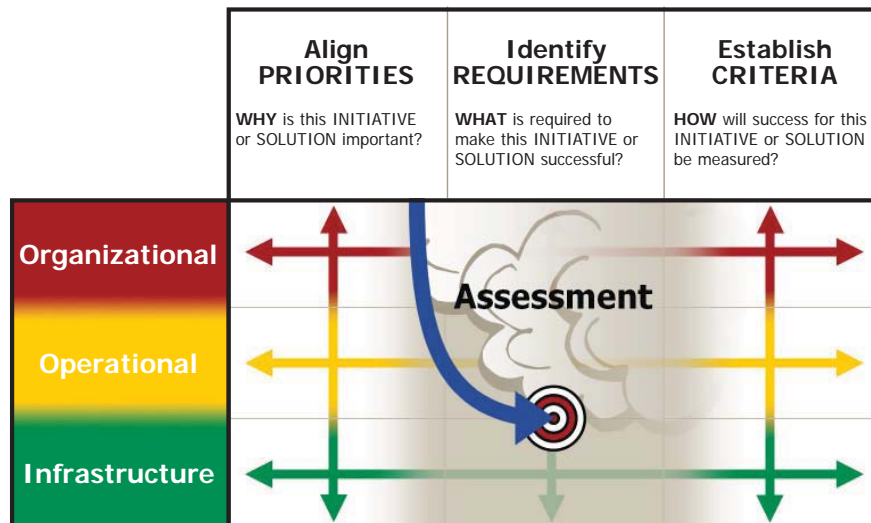


- Kevin started his review of the Alignment of Priorities for MI by saying: "My goal is not to be right, but to get it right, please correct me where I am off track."

- He started on the left hand side of the visual and worked his way to the right hand side.
- He stated that he took into consideration the economy, MI's industry, and MI's financials as compared to its competitors to ensure he had a solid understanding of the external dynamics within which MI must thrive.
- He suggested that a company could only have some combination of four organizational goals (red) and some combination of fourteen organizational strategies (red) that must be executed to achieve the goals.
- Reviewed his rationale for how he identified goals and strategies specific to MI (two goals and five supporting strategies) based solely on his own research using information available to the public (MI's Annual Report, Quarterly Filings, etc.).
- Continued by suggesting that operational (yellow) processes must be improved to support the execution of organizational strategies (red) to obtain organizational goals (red).
- Suggested there were only fifteen high-level operational processes (yellow) that a company could improve.
- Reviewed his rationale for how he identified three operational processes specific to MI, again based solely on his own research using information available to the public.
- He stated that an initiative, like MI's eBusiness initiative, was intended to improve the efficiency, cycle-time, and effectiveness of key operational (yellow) processes.
- Reviewed how he believed MI's eBusiness initiative could improve the efficiency, cycle-time, and effectiveness of the three operational processes he had previously selected.
- Then he referred to and explained how the operational (yellow) process improvements aligned with and supported the execution of MI's organizational strategies (red) to obtain its organizational goals (red).
- Kevin constantly asked for feedback each step of the way as he walked through the Alignment of Priorities for MI and its eBusiness initiative to ensure he was "getting it right" from my perspective.

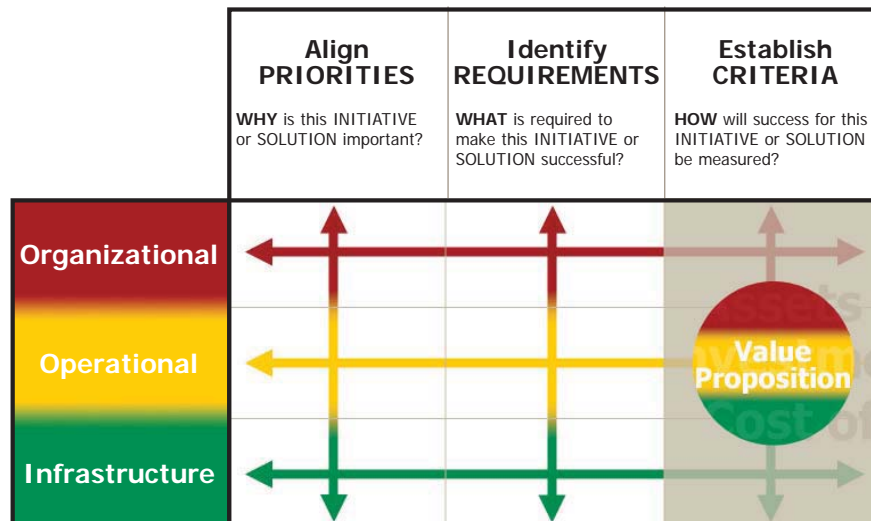
REQUIREMENTS (WHAT)

- "The Gap" visual and The Assessment Questions support the **requirements** dimension within the *Dimensions of Success* framework.
- Initiatives take one of two paths: "Fast Path" or "Falling into The Gap."
- Initiatives in "The Gap" take more time than necessary to complete, which drives both opportunity costs (costs of the solution) AND opportunity loss (delay in the realization of the intended value of the solution).
- "The Gap" visual and the Assessment Questions are intended to be used early-on so that key questions are answered in a timely manner. In this way, the business initiative or solution is more likely to start on the "Fast Path."
- "The Gap" visual and the Assessment Questions can also serve as an ongoing reference to ensure that a business initiative or solution stays on the "Fast Path" and avoids falling into "The Gap" throughout its lifecycle.



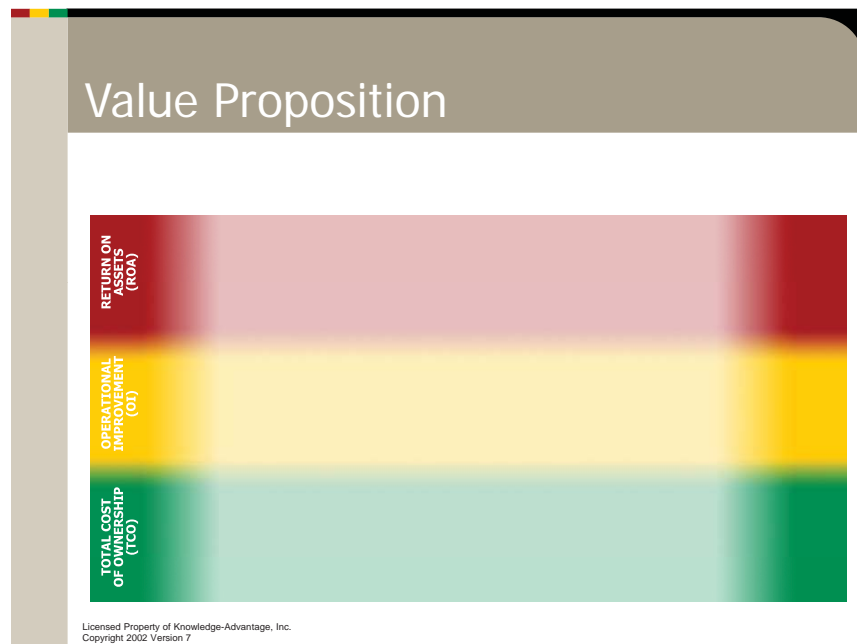
CRITERIA (HOW)

- **Value Proposition** supports the **criteria** aspect within the *Dimensions of Success* framework.



- Intended to help communicate the criteria for and the potential value of a business initiative or solution.
- As before, colors (Red, Yellow, Green) are an expression of value based on the criteria used by organizational, operational, and infrastructure stakeholders.

- **Return on Assets (ROA)** is an Organizational (red) criteria based on the focus/link to the Balance Sheet and Income Statement.
- **Return on Investments (ROI)** is an Operational (yellow) criteria based on the focus/link to efficiency, cycle-time, and effectiveness gains of operational processes.
- **Total Cost of Ownership (TCO)** is an Infrastructure (green) criteria based on the constant focus/link to reducing infrastructure costs over the lifecycle of a business initiative or solution.
- Presented with blank Value Proposition visual.



- Then presented with a high-level Value Proposition for MI's eBusiness initiative.
- As with the Alignment of Priorities, Kevin stated that his goal was not to be right, but to get it right. "Please correct me where I am off track," he had said.

MI's eBusiness Value Proposition



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- Described the potential value first in Green (TCO) terms, then Yellow (ROI) terms and concluded in Red (ROA) terms.
- Visuals and explanations were straightforward and concise.

REVIEW...

- Each of the three key dimensions (Priorities - WHY, Requirements - WHAT, Criteria - HOW) within the *Dimensions of Success* framework has a supporting set of tools:
 - Align PRIORITIES - use the Alignment of Priorities visual.
 - Identify REQUIREMENTS - use "The Gap" visual and Assessment Questions.
 - Establish CRITERIA - use the Value Proposition detail and summary visuals.

APPLYING...

- Kevin suggested I do the following in terms of applying what we covered:
 - Inventory previous journal entries within the context of the *Dimensions of Success* framework and supporting tools to gain additional insight/clarity.
 - Use the automated job aides (Alignment of Priorities, Assessment Questions, Value Proposition) that produced the straw man provided by Kevin to create a set of key visuals and supporting documents that reflect MI's realities.
 - Establish a plan to use the *Dimensions of Success* framework and supporting tools in a collaborative manner with key stakeholders within MI to build consensus to ensure the early-on and ongoing success with MI's eBusiness initiative.

GOING FORWARD...

- Kevin provided references for previous clients that had used the *Dimensions of Success* framework and supporting tools to ensure the early-on and ongoing success of their business initiatives or solutions.
- Agreed to follow up Monday afternoon after my meeting with John.

Mike reviewed his notes a second time. He was beginning to feel very comfortable with how the *Dimensions of Success* framework and supporting tools worked and related to each other. He was amazed at how much he and Kevin had covered in so short a time. Wanting to maintain his momentum, he turned to his journal to document his plans for going forward.

He entitled his next journal entry “Next Steps.”

Day #47 - Next Steps

- Refine Alignment of Priorities and Value Proposition visuals using automated job aides provided by Kevin based on all previous journal entries through Day #45.
- Review refined Alignment of Priorities and Value Proposition visuals and update responses to the Assessment Questions with Sue Jacobs to ensure we are on the same page regarding the eBusiness initiative.
- Based on collaborative agreement with Sue, incorporate jointly developed deliverables into the review materials for meeting with John on Monday.
- Recommend to John some form of efficient collaborative exchange within the next two weeks with Jim, Doug, Sue, and others to get everyone on the same page with regards to MI's “Seize the Moment” eBusiness initiative.

Mike stopped writing a moment, the pen still in his hand, and glanced at his watch. It was 1:40 p.m. “Time for one more entry,” he said to himself. “And then a mad dash for a ‘blue plate’ before the cafeteria closes.

Day #47 - Comments/Observations Regarding Kevin Cooper and ISAP

- Kevin has been unlike any vendor I have ever met.
- Despite the fact that I know he is trying to sell me something, I am comfortable involving him more closely going forward.
- He has consistently demonstrated from his very first interaction that he has my interests clearly and explicitly in mind. He is quickly earning my trust and confidence.

- What he has provided has proven both timely and valuable.
- He has clearly and logically convinced me that the degree of success MI will realize from its “Seize the Moment” eBusiness initiative is based on how well MI’s leadership team collectively and explicitly positions the initiative within the *Dimensions* (Priorities, Requirements, Criteria) of *Success* framework and supporting tools.
- Assuming MI proceeds with this eBusiness initiative, I personally will make sure Kevin and ISAP are provided a serious shot at earning the business.

Mike finished writing at 1:57 and practically jumped up from his desk and headed out the door towards the cafeteria. He laughed, thinking about the fact he was racing for a “blue plate” special. As he came out of the cafeteria fifteen minutes later he saw Sue walking about forty feet ahead of him.

“Sue, do you have a second?” he said, a degree almost of jubilation in his voice. Sue turned and Mike walked swiftly to catch up.

“Hi Mike,” she said. “Did you receive my refinements to your questions?”

“I sure did. And I’ve already incorporated all of your responses,”

“That was fast,” said Sue.

“And it’s only the beginning,” said Mike. “Which is another reason I’m glad I ran into you. I was hoping to buy you lunch tomorrow and walk you through the materials I plan to use with John on Monday.”

Sue paused for a moment, thinking about her schedule.

“Let’s see. I have to review the revenue projections for the coming quarter with Doug at 11:30. But I could get together for a quick bite around 12:45,”

“Sounds great. I’ll meet you at your office at 12:45.”

They shook hands and then Mike, armed with his “blue plate” special, made a beeline for his office. He was determined to have a productive afternoon, but first there was lunch. Sitting at his desk, his blue plate looked fairly appetizing through the Saran Wrap. In his starved condition he did not care how it would actually taste. As his stomach growled he ripped off the wrap and started eating.

Small Wins Matter...

Driving up to ISAP corporate headquarters, Kevin was still replaying in his mind his meeting with Mike. His single objective for the call had been to demonstrate that he had Mike's interests genuinely in mind. He felt he had met the objective, at least for the moment.

The positive feeling he had about his meeting with Mike was based on the amount of time Mike had allotted for the meeting, the manner in which Mike had expanded his disclosure during the afternoon, and the fact that Mike volunteered he would follow up on Monday afternoon.

He parked his car, grabbed his briefcase, and headed towards his office. "Trust is hard to build," he reminded himself. "And easy to lose. I have to keep re-earning it every day."

When he reached his desk he opened his notebook to review and update his plan for MI.

Day #3 - Plan for MI (Updated)

- Pleased with initial face-to-face meeting with Mike.
- The mantra of "getting the tools out of my head, into my hands, into Mike's hands" worked well.
- The tools allowed me to demonstrate explicit actions with the intent of being trustworthy.
- Getting Mike to engage in the use of the tools helped to quickly create a collaborative (do with) environment.
- Mike quickly grasped the intent and use of the *Dimensions of Success* framework and supporting tools.
- Mike is in a high opportunity/risk situation from a personal and professional perspective.
- MI's eBusiness initiative is definitely at risk of falling off of the "Fast Path" and into "The Gap."
- My potential to sell ISAP offerings is directly tied to Mike's ability to keep the eBusiness initiative on the "Fast Path."
- The next couple of weeks are key to the early-on and ongoing success of MI's eBusiness initiative and Mike's subsequent role/involvement.
- Provided Mike with the automated job aides that I used to generate the Alignment of Priorities and Value Proposition visuals that we reviewed.
- Suggested strongly that he inventory his previous journal entries within the context of the *Dimensions of Success* framework and supporting tools to gain additional insight/clarity.

- Provided client references and encouraged him to contact them to gain additional “peer” perspectives on what they did to ensure their early-on and ongoing success.
- Next step is checking in next Monday.
- Will send an email this afternoon to recap today’s meeting and reinforce my ongoing availability to assist.
- Will attach a couple of additional examples of the key visuals (Alignment of Priorities, Value Proposition) created by previous clients for his reference.

Kevin reread his notes a couple of times until he felt confident that it accurately reflected his assessment and “going forward” plan. Feeling comfortable then with the way things were going, he clicked on the monitor of his PC and began drafting his email to Mike.

If You Know What You're Looking For... You Will Find It...

Mike looked carefully at his notes and the visuals that Kevin had provided. As he looked at the Alignment of Priorities, “The Gap,” and Value Proposition visuals, he began to replay in his mind the conversations he had had with Jim, Doug, Sue, and John over the past forty-five days. He was struck both by the accuracy of Kevin’s due-diligence and the simplicity by which Kevin expressed his findings. For the first time, Mike was beginning to see a picture of how all the collective efforts over the past forty-five days could be brought together to ensure MI’s eBusiness initiative stayed on the “Fast Path.”

Mike centered the Alignment of Priorities, “The Gap,” and Value Proposition visuals for MI’s eBusiness initiative at the top of his desk. To his left he had his laptop with the automated job aides that created the visuals and supporting details. He planned to spend the rest of the afternoon reviewing all of his previous journal entries. His objective was twofold. First, he would inventory all of his notes within the context of the *Dimensions of Success* framework and supporting tools. Secondly, based on his findings, he would refine and revise his responses to the Alignment of Priorities, Assessment Questions, and Value Proposition Kevin had left behind.

Mike recalled how he felt when attempting a similar exercise just a few days earlier. That had proved exhausting and had quite frankly provided little if any additional insight. Now, however, he felt energized, motivated, even eager. Suddenly he realized why he felt different. Now, he had a framework with supporting tools to guide his effort. Before he had been working to create something from scratch. But he was absolutely sure that the framework and supporting tools would provide him a set of filters to eliminate the extraneous and a set of lenses that would bring clarity to what was critical.

“If you do not know what you are looking for, you will not know it when you find it!”

Mike laughed when he thought about what he had just said and then turned to the task at hand. He went through his journal entries sequentially. And as he scrutinized each entry, he created a brand-new journal entry in tabular format that corresponded to his previous entries. Each tab addressed four areas:

- One of the three key dimensions (Priorities, Requirements, Criteria).
- The supporting tool used (Alignment of Priorities, “The Gap” visual, Assessment Questions, Value Proposition).
- The category (Organizational - RED, Operational - YELLOW, Infrastructure - GREEN) of stakeholder the entry related to.
- And any MI specific comments.

Day #47 - Applying the Dimensions of Success Framework

Day #1 - Meeting with John Topkins (60 Minutes)

Dimension	Tool	Category	MI Specific Comments
Priorities	Alignment of Priorities	Operational (Yellow)	Focused on cycle-time (speed) and effectiveness (better collaborative outcomes).
Priorities	Alignment of Priorities	Operational (Yellow)	Processes critical to improve include customer service, customer relations (current customers), and customer creation (new customers).
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	"Phase 0" is intended to properly set expectations early-on to ensure this eBusiness initiative starts on the "Fast Path" and avoids falling into "The Gap."

Day #3 - Meeting with Jim Bowman (22 Minutes)

Dimension	Tool	Category	MI Specific Comments
Priorities	Alignment of Priorities	Organizational (Red)	Industry pressures are dramatically increasing based on overall downturn, which in turn is driving more desperate actions on the part of the industry players.
Priorities	Alignment of Priorities	Organizational (Red)	Revenue growth doubled through acquisitions.
Priorities	Alignment of Priorities	Organizational (Red)	Revenue growth year-to-year is down.
Priorities	Alignment of Priorities	Organizational (Red)	Profit margins year-to-year are down.
Priorities	Alignment of Priorities	Organizational (Red)	Resources refer to under-utilized assets (Balance Sheet) as a result of previous MI acquisitions. Available resources do not support additional growth through acquisitions.
Priorities	Alignment of Priorities	Operational (Yellow)	Processes critical to improve include Customer Service, Customer Relations (Current Customers), and Customer Creation (New Customers).
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Must have a consensus on the answers of the questions to ensure quick and consistent wins.
Criteria	Value Proposition	Organizational (Red)	Better use of existing resources (assets) will drive ROA.
Criteria	Value Proposition	Operational (Yellow)	Sue Jacobs is the "Operational" Owner who must determine success criteria for ROI (efficiency gains, cycle-time gains, effectiveness gains).

Day #6 - Meeting with Sue Jacobs (45 Minutes)

Dimension	Tool	Category	MI Specific Comments
Criteria	Value Proposition	Organizational (Red)	ROA - Revenue Growth.
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Relations Process must be improved (Effectiveness Gains - Client Satisfaction).
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Creation Process must be improved (Effectiveness Gains - New Sales).

Day #9 - Meeting with John Topkins (30 Minutes)

Dimension	Tool	Category	MI Specific Comments
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage analysts to gather "best practices" with regards to providing answers to the Assessment Questions.
Priorities	Alignment of Priorities	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage analysts to gather "best practices" with regards to priorities driving a business initiative or solution.
Criteria	Value Proposition	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage analysts to gather "best practices" with regards to criteria driving a business initiative or solution and resulting value realized.

Day #13 - Vendor Requests (90 Minutes)

Dimension	Tool	Category	MI Specific Comments
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage established vendors to gather "best practices" with regards to providing answers to the Assessment Questions.
Priorities	Alignment of Priorities	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage established vendors to gather "best practices" with regards to priorities driving a business initiative or solution.
Criteria	Value Proposition	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Leverage established vendors to gather "best practices" with regards to criteria driving a business initiative or solution and resulting value realized.

Day #18 Meeting with Sue Jacobs - VP of Sales and Marketing (90 Minutes)

Dimension	Tool	Category	MI Specific Comments
Priorities	Alignment of Priorities	Operational (Yellow)	Confirmation of processes critical to improve: Customer Service, Customer Relations (Current Customers), and Customer Creation (New Customers).
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Relations Process, Effectiveness Gains to be realized - Customer Satisfaction, Customer Loyalty, Responsiveness, Accuracy.
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Creation Process, Effectiveness Gains to be realized - New Sales, Responsiveness, Accuracy.
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Relations Process, Efficiency Gains to be realized - Increase Professional Productivity.
Criteria	Value Proposition	Operational (Yellow)	ROI - Customer Creation Process, Efficiency Gains to be realized - Increase Professional Productivity.

Day #22 Meeting with Doug Johnson (25 Minutes)

Dimension	Tool	Category	MI Specific Comments
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Most initiatives/solutions that fall into "The Gap" result in increased opportunity costs (cost of the initiative/solution) and opportunity losses (delay in the realization of intended value of the initiative/solution).
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Get consensus to the answers for the Assessment Questions to help stay on the "Fast Path" and minimize/mitigate the risk of falling into "The Gap."
Criteria	Value Proposition	Organizational (Red)	ROA - Balance Sheet and Income Statement impact drives financial performance.
Criteria	Value Proposition	Operational (Yellow)	ROI - Business Process Impact - Inflows (Value).
Criteria	Value Proposition	Infrastructure (Green)	TCO - Infrastructure Investments - Outflows (Costs).
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Must be able to answer "Why" the initiative supports the priorities (organizational, operational, infrastructure) of the company.
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Must be able to answer "What" are the requirements for the initiative.
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Must be able to answer "How" the success of the initiative will be measured in terms of value (ROA, ROI, TCO).

Day #30 A Day with the Vendors (3 - 2 Hour Sessions)

Dimension	Tool	Category	MI Specific Comments
Requirements	Assessment Questions	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used to highlight the requirements for the initiative and to determine the potential roles/resources required by the vendors.
Priorities	Alignment of Priorities	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used to highlight the organizational, operational, and infrastructure priorities and to determine how vendor offerings might enable the priorities.
Criteria	Value Proposition	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used to highlight the criteria for measuring success to determine the potential value of vendor offerings based on the criteria.

Day #31 Meeting With John Topkins (30 Minutes)

Dimension	Tool	Category	MI Specific Comments
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used as a visual means to provide an update and seek explicit and contextually relevant guidance for next steps.
Requirements	Assessment Questions	Infrastructure (Green)	Serve as a checkpoint to assess whether "Phase 0" is proceeding according to expectations (timing, deliverables, etc.).

Day #32 Meeting With Sue Jacobs (45 Minutes)

Dimension	Tool	Category	MI Specific Comments
Requirements	Assessment Questions	Operational (Yellow)	Reinforce that initiatives will take one of two paths.
Requirements	Assessment Questions	Operational (Yellow)	Get consensus to the answers for the Assessment Questions to help stay on the "Fast Path" and minimize/mitigate the risk of falling into "The Gap."
Criteria	Value Proposition	Operational (Yellow)	ROI - NOTE, change in sequence of success criteria ... being driven by reality of challenging quarterly performance.
Criteria	Value Proposition	Organizational (Red)	ROA - Revenue drives asset usage which drives ROA.

Day #32 Voicemail from John Topkins (<1 Minute)

Dimension	Tool	Category	MI Specific Comments
Dimensions of Success Framework	Toolset	Infrastructure (Green)	Used as a visual means to provide an update and seek explicit and contextually relevant guidance for next steps.
Requirements	Assessment Questions	Infrastructure (Green)	Serve as a checkpoint to assess whether "Phase 0" is proceeding according to expectations (timing, deliverables, etc.).

Day #37 Unsolicited Vendor Bid

Dimension	Tool	Category	MI Specific Comments
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used as a consistent and contextual means to evaluate vendor proposals/bid.

Day #42 Forwarded Email from John Topkins Originally Sent by Jim Bowman

Dimension	Tool	Category	MI Specific Comments
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used as a visual means to provide an update and seek explicit and contextually relevant guidance for next steps.

Day #44 Forwarded Email from John Topkins Originally Sent by Jim Bowman

Dimension	Tool	Category	MI Specific Comments
Dimensions of Success Framework	Toolset	Organizational (Red)/ Operational (Yellow)/ Infrastructure (Green)	Used as a visual means to provide an update and seek explicit and contextually relevant guidance for next steps.

As Mike finished rereading his entries, he clearly realized that the *Dimensions of Success* framework and supporting tools were serving two purposes. First, they acted as a means to crystallize what he had been trying to do thus far intuitively. Second, they served as a catalyst to facilitate a collaborative outcome by helping individuals to work

better together. Mike remembered what Kevin had said about this kind of collaboration. “My goal is not to be right, but to get it right.”

Mike had realized that Kevin was facilitating the use of a framework and supporting tools. What he had not realized was that because the framework and supporting tools were the point of focus, when there was uncertainty or disagreement, the framework and tools took the heat of the contention, not the individuals using the framework and tools.

A wave of understanding washed over Mike. He had been acting as the “human” tool to bring MI’s eBusiness initiative together. And as that tool, Mike had unknowingly made himself the catalyst for MI’s eBusiness initiative. Mike vowed at that defining moment, that he would not be the catalyst. While science was never his passion, he knew that catalysts had a useful life and then either expired without a trace or were disposed of! Mike would instead let the *Dimensions of Success* framework and supporting tools take the heat. That’s what Kevin repeatedly demonstrated and said during their session earlier that day.

“Remember, Mike, facilitate the *Dimensions of Success* framework and supporting tools, and they will take the heat as you drive for a collaborative outcome that serves the collective interests of everyone involved.”

Mike’s understanding of this truth was no longer intuitive. He understood explicitly that Kevin’s advice was critical to MI’s early-on and ongoing success with the “Seize the Moment” eBusiness initiative. Kevin’s words, in fact, would become the mantra leading to success. And the company’s success would in turn ensure Mike’s own success, both professionally and personally.

He couldn’t help but smile as he compared where he was now to just a few days earlier.

Lunch... Listen... Learn...

Mike waited outside Sue's office for his 12:45 lunch. At exactly 12:45, Sue's office door opened and out walked Sue. It was obvious from the scowl on her face that her call with Doug Johnson had not gone well. As she made eye contact, Mike could see her attempting to offer a faint smile.

Feeling confident with his own preparation and what he wanted to accomplish, Mike stated softly, "From the look on your face, it looks like your call with Doug was challenging."

"Yes it was, and based on the reality of where MI finds itself, we ended up taking it out on each other."

Mike thought to himself that this was yet another example where competent individuals lacking a framework and a set of supporting tools end up toe to toe in the ring.

"Do you still have time for us to get a quick bite?" Mike asked earnestly.

"I guess I don't have anything better to do right now," said Sue. And then realizing perhaps how careless her comment must have sounded, hastily added, "I need a break to collect my thoughts, so a quick bite together would be great!"

Mike smiled.

"Let's go offsite and get some real food," said Mike. "I'm tired of cafeteria food, particularly blue plate specials!"

They headed towards the employee entrance, and fifteen minutes later were giving their orders to a waitress in a local steak house. When their drinks arrived, an ice tea for Sue and water for Mike, they decided it was time to get down to business.

Just as Kevin had done with him, and as Mike had rehearsed in his office repeatedly, Mike began using the *Dimensions of Success* framework and supporting tools with Sue. They were so intent on their discussion that it was several moments before they noticed their waitress standing patiently by their table holding a black tray with two Caesar salads. Mike and Sue realized there was no room on the table. The Alignment of Priorities and the Value Proposition visual and their collective responses to the Assessment Questions covered everything like a tablecloth.

They looked up at the waitress, who stood patiently smiling, and they apologized and cleared a small space for their salads. Then without so much as a bite, they continued their intense dialogue. Mike found himself smiling as he watched the two of them aligning together to face squarely the opportunity at hand. Then he remembered another of Kevin's earlier comments and his smile became even bigger. "When individuals get

together to solve a problem,” Kevin had said, “they create energy. Energy properly channeled creates collaborative outcomes. Energy not properly channeled creates heated dialogues which typically strain relationships.”

According to Kevin, and Mike could see the proof of it here at the table, using a framework and supporting tools as a third party mechanism allowed individuals to align and triangulate their energy on the problem at hand. By triangulating the energy, individuals could minimize the risk of disagreements getting in the way of creating collaborative outcomes.

By the time they finished their desserts, Mike and Sue were in complete and collaborative agreement about what needed to be done next to ensure the early-on and ongoing success of MI’s “Seize the Moment” eBusiness initiative.

“Some more coffee perhaps?” It was the waitress.

Mike nodded. “And the check,” he said.

The waitress deftly poured another cup of coffee for each of them and then left the bill face down on the table. Quick as a wink, Sue grabbed the check.

“Mike, until this lunch, I thought of this eBusiness initiative as a distraction from what MI needed to do to drive profitable revenue growth. For the first time, I am beginning to understand both explicitly and visually the tactical and strategic implications of this initiative. It’s funny, but what we’ve been talking about here actually helps to explain and clarify some of the comments Doug made earlier today, during our conference call.”

Mike could hardly wait to get back to his office. He and Sue had chatted about what they needed to do the whole way back from the steak house. As they were about to part company in the employee lobby, Sue offered warmly with enthusiasm, “You have my complete commitment and support with regards to this initiative. I look forward to connecting Monday afternoon after your meeting with John to continue with our next steps.”

They were both feeling optimistic and confident, and their optimism and confidence fed each other. With that they both turned and proceeded their separate ways. Mike did not remember the last time he had felt so energetic. Moments later, he was back at his desk, his journal open, thinking about his lunch with Sue Jacobs. Then he picked up his pen and began writing.

Day #48 - Lunch with Sue Jacobs (90 Minutes)

- Sue is under extreme pressure to tactically generate revenue.
- Demand for MI's offerings has dramatically softened.
- Sue is beginning to clearly realize that turning up the intensity of the current sales model will generate more activities but fail to produce material incremental business results.
- Out of chance, the timing of our lunch was practically perfect.
- Built on our previous collaborative effort to answer the Assessment Questions to introduce the *Dimensions of Success* framework and supporting tools.
- Took about five minutes for her to conceptually understand the framework and supporting tools.
- Reviewed how I took all of our collective findings to date and inventoried them within the context of the *Dimensions of Success* framework and supporting tools.
- Shared the findings using the revised responses to the Assessment Questions along with the Alignment of Priorities and Value Proposition visuals.
- She slightly refined the Alignment of Priorities with operational process specifics.
- Sue substantially added to the ROI (Organizational - YELLOW) criteria based on what she needs to get done.
- We revisited the responses to the Assessment Questions again and made a few additional revisions based on our dialogue.
- Sue agreed strongly with the concept of "let the tools take the heat" given the current pressures on MI and the leadership team.
- We both agreed that the *Dimensions of Success* framework and the supporting tools could serve as the catalyst to bring the leadership together and help foster a fully aligned and unified understanding with regards to MI's "Seize the Moment" eBusiness initiative.
- She counseled that the leadership team would most likely be very impatient during the "Phase 0" briefing. Grabbing their attention quickly is critical!
- She provided her undivided commitment and vowed she would vocalize her support during the "Phase 0" briefing with the leadership team.
- We agreed I would follow up after my meeting with John on Monday.

Mike was very pleased with his progress. More importantly, he was now feeling very confident about his meeting with John on Monday. He looked at his notes a final time and then his watch beeped at the top of the hour. It was 3:00 p.m. A couple of good hours to put the final polish on his review for John, and then it was off to pick up his fiancée for a getaway weekend!

Two hours later, Mike finished his review for John. He thought it was logical and sound. He planned to Kevin's oft-cited theme:

The goal is not to be right, but to get it right - together.

He had picked the theme based in part on his experience over the past couple of days, but also because of something Kevin had mentioned during their last meeting. Kevin had said, "Purposefully provide an 80% complete answer. Then work as a team to collaborate on the remaining 20%. With collaboration, you get a more durable commitment going forward."

Mike saw little to no risk with this theme based on the fact that he had already been both the receiver and facilitator of the approach that supported the theme. So that was that. All he needed to do before joining Brenda was check his email and voicemail, a seemingly endless routine.

True to form, the majority of emails were of little to no value. But as he raced through them he came across Kevin's follow-up from their meeting. The note was short and to the point. Kevin again mentioned his appreciation for the opportunity to get together and then he extended an invitation to contact him over the weekend via his mobile if he could be of assistance. He concluded by calling attention to several attachments that provided additional examples of what other clients had done using the *Dimensions of Success* framework and supporting tools. Mike quickly viewed and then saved the attachments so he could look at them in the near future.

With all but Kevin's email deleted, Mike clicked off his computer and hit his speakerphone button to listen to his voice messages. He plowed through them quickly, taking notes as appropriate. The last message was from John, who said simply that he was looking forward to their Monday morning meeting.

"So am I!" said Mike, smiling as he locked and closed his door. When he reached his car, he realized he was humming the theme from the movie *Rocky*. With his sunglasses on and the car top down, he could truly feel his adrenaline pumping through his veins. As Mike hit the gas the wind began to howl and he began to howl back, "Gonna fly now." As he entered the freeway he knew he was in for a great get-away weekend with Brenda!

Here Goes Everything...

Armed with his double café latte, Mike was ready. The weekend had given Mike a needed breather and some time to reflect on what had transpired over the past fifty-one days. Of course he didn't spend the entire weekend thinking about MI. He and Brenda had taken long walks on the beach and ate candlelight dinners in their hotel suite and on Saturday they had gone dancing until dawn. If the weekend was a harbinger of what this day would bring, it was going to be a great Monday!

Mike had a couple of hours until he met with John. He sat at his desk reflecting on what he and MI were trying to achieve with respect to the "Seize the Moment" eBusiness. On a single sheet of paper, Mike laid out three columns with the following headers: *The Good*, *The Bad*, and *The Missing*. The columns would help him critically assess and document his performance.

The items listed in *The Good* and *The Bad* columns were straightforward. As expected, the items in *The Good* column slightly outweighed those in *The Bad* column. What had captured Mike's attention, however, were the items he listed in *The Missing* column. Mike opened his journal and began to record *The Missing* items as a new journal entry.

Day #51 Self-Assessment - The MISSING

- Everyone genuinely wanted to help, but did not know how to help.
- There needed to be a universal translator to bring the variety of languages used by different stakeholders to describe the same thing (i.e.: MI's "Seize the Moment" eBusiness initiative) together on the same page.
- There was no visual evidence of progress during "Phase 0" which, as a result, created frustration.
- The due-diligence throughout "Phase 0" was done intuitively, without the explicit use of a framework with supporting tools designed specifically to ensure collaboration among key stakeholders.

Mike looked up from the list and realized that the items he had listed were some of the core reasons why early on in the process, business initiatives or solutions fall off the "Fast Path" and into "The Gap." As he looked at *The Missing* items, he realized that until meeting Kevin, he had never been able to explicitly put his finger on why the majority of business initiatives or solutions failed to meet their expectations, both initially and throughout their lifecycle. He laughed as he thought about the endless list of articles that described the equivalent of "The Gap," but never provided practical answers to deal with *The Missing* items he had listed.

“And to think, it was a vendor who helped me recognize and deal with this!”

Mike shook his head in amazement and then looked at his watch. It was 8:30 a.m., time for another dry run through the materials. But before he began this third and final practice pass, he made a few notes pertaining to *The Missing* items he had just listed on one of the sheets of paper he planned to share with John.

Ninety minutes later, Mike was standing at John Topkins’ door. The door was partly open and Mike could see John inside busily writing something at his desk. Then Mike’s digital watch beeped, which meant that it was 10:00 a.m. John heard the beep, looked up, rose from his desk, and motioned for Mike to enter. John’s face uncharacteristically lacked any emotion.

“Mike, let’s sit over on the couch,” John said.

Mike was thrown off guard by John’s demeanor, and then all of a sudden he remembered Sue warning him that the leadership team would be impatient. While Mike had earnestly accepted Sue’s council, for whatever the reason, he did not think this would pertain to John. Now, as he made eye contact with John, he wished that he had!

John sat down in an armchair opposite the couch and jumped right in. “I hope you’ve got something good for me.” Mike paused for what felt like an eternity, and in the silence his mind raced, a series of motivating mantras echoing in his head. “Failure is not an option, persevere, stay the course, don’t be the tool, the goal is not to be right but to get it right... together.”

Then Mike took a deep breath and leaned forward to make eye contact with John. “I believe you will be pleased with what I share, but that is obviously up to you to decide.”

John continued. “I received a call from Doug and Sue this morning regarding the status of the MI ‘Seize the Moment’ eBusiness initiative.”

Mike remained composed as he waited to hear the contents of both calls. John didn’t skip a beat.

“Doug wants to pull the plug on this initiative given the current business performance of MI and projections for the next six to nine months,” said John

“And what did you say in response?” Mike asked, his emotions beginning to rise.

“I told him that we needed to act responsibly and not overreact to the current business environment. I continued by saying that we need to suspend judgment until we formally reviewed the “Phase 0” findings next Monday at the leadership meeting. Doug agreed to back off until then.”

After a brief pause, Mike said, “You mentioned you talked with Sue this morning.”

“I talked with her prior to talking with Doug in preparation for our meeting,” John said. “I wanted to get her perspective on how things were going.”

“And what did she offer?”

“Frankly, I was shocked,” said John.

Mike felt his heart stop. John continued.

“She was uncharacteristically positive.”

Mike could feel his heart starting to beat again, while John, not sensing Mike’s sudden and temporary panic attack, continued talking.

“Sue said she was 100% in agreement with what you would be sharing with me today. She made it clear that originally she was not fully committed to the “Seize the Moment” eBusiness initiative. But now, in light of the current business conditions and what you plan to recommend, she believes it is critical that MI continue to advance this initiative through Phase 1. So there you have it. I hope you can now more clearly understand why I said that I hope you have something good.”

John leaned back in his chair and waited for the good news. Mike responded quickly and confidently.

“A little bit of contention can be healthy assuming it’s properly channeled,” Mike said. He could see that John was puzzled by this comment, but he also knew that John would soon enough understand the significance of what he had just said.

Smiling slightly, Mike spread out the materials he planned to refer to on the coffee table in front of him. Methodically, he worked his plan, just as he had intended. He started by giving John a single page summary of the key activities leading up to today. He then handed John a single page list of “The Missing” items. As Mike reviewed the list, he could tell that he had John’s attention.

He then gave a brief explanation of the *Dimensions of Success* framework.

“So far this is just structured common sense.”

“That is precisely the intent. The *Dimensions of Success* framework provides the context to hold together a series of tools which facilitate a collaborative common sense approach to ensure the early-on and ongoing success of a business initiative or solution.”

John gave a nod of understanding and Mike proceeded to review what he and Sue had done together using the *Dimensions of Success* framework and the supporting tools. Mike started with the priorities dimension by walking through an Alignment of Priorities visual that addressed the positioning of MI’s “Seize the Moment” eBusiness initiative. He then covered the criteria dimension by using the Value Proposition visual to high-

light the types of criteria that would be used and the expected value to be realized. Finally, he addressed the requirements dimension by reviewing “The Gap” visual and supporting Assessment Questions with the responses he and Sue had drafted. As Mike finished he sat back, awaiting John’s overall reaction.

There was at least a minute of silence as John inspected each key deliverable Mike had shared. Then John leaned forward and asked, “Is that it?” Mike shook his head and looked John squarely in the eyes.

“This is not it,” he said. “This is just a straw man.”

“What do you mean?” John asked, somewhat annoyed.

“Remember when I said earlier that it is good to have a little contention when you have a means to channel it?”

“Yes, I remember,” said John, still unsure what Mike was leading up to.

“Remember after I shared ‘The Missing’ items, we agreed that when evaluating a business initiative or solution there needs to be a means or catalyst to facilitate a collaborative exchange among key stakeholders. And by allowing the tools to take the heat, individuals will collaborate better, contribute more, resulting ultimately with a stronger overall commitment by the stakeholders to the success of the initiative.”

Mike could see John’s frustration rising as he struggled to get Mike’s point.

“John, when I started this meeting with you, I suggested my goal was not to be right, but to get it right together. I have used a framework and supporting tools to create an 80% complete recommendation. I am now looking for us together to make it 100% complete. By working collaboratively and making some additional shared contributions, our mutual commitment to this initiative will increase.”

Mike knew John was on the edge of getting his point, so he continued.

“I took the same approach with Sue. I presented an 80% complete answer. She and I worked together to come up with the remaining 20% to make it 100% complete. As a result, I earned her 100% support and commitment to bring the initiative forward for your review. I am now taking the same approach with you. She and I have created an 80% complete answer that I am sharing with you. Now, I am asking you to work with me, in a collaborative effort, so that we together can come up with the remaining 20%. Then we will have a 100% complete answer to bring forward to Doug and Jim.”

John smiled as it all connected.

“So you are suggesting that we would bring forward an 80% complete answer and look to Doug, Jim, and the other leaders to explicitly contribute to the remaining 20%. As a

result we would collaboratively gain their 100% support and commitment to MI's 'Seize the Moment' eBusiness initiative."

"You've got it!" Mike exclaimed.

John leaned back in his chair and smiled.

"When you think about it," he said, "the approach you are suggesting is right in keeping with Jim's vision for this initiative. He called this initiative officially eBusiness - Creating a Collaborative First Mover Advantage. Jim believes strongly by creating a more collaborative culture, MI can gain a first mover advantage relative to our competitors. However, to your earlier point, in order to efficiently and effectively collaborate, you need to have framework and supporting tools to facilitate the process."

It was only at that moment that Mike recognized the true value of what he was recommending. His suggestion to use a collaborative framework with supporting tools to get the 100% commitment and support from Jim, Doug, and the other key executives was exactly what Jim intuitively hoped MI's "Seize the Moment" eBusiness initiative would enable between MI and its prospects and customers.

Mike leaned back in amazement.

"Did Kevin know this all along," he asked himself, "and was simply waiting for me to discover it on my own?"

"What did you say?" John asked.

"Nothing," Mike said. "I was just thinking out loud." Mike then relaxed and turned the focus back to the task at hand. "John," he said, "I would like to recommend that you and I invest time together tomorrow morning to ensure we have a 100% complete answer based on our collective contributions. Then, I would like to suggest that we follow almost the identical approach that I used here today to present our collective findings to Jim, Doug, and the other key members of the leadership team."

John paused for a moment.

"Of course nowhere in our discussion have you identified the range of potential investments in infrastructure that MI might have to consider. Knowing Doug, we need to at least have a high-level sense for planning purposes." Mike nodded, "I will have some very preliminary numbers for us by Friday that we can then incorporate for Monday's session with the leadership team."

And then the meeting was over. Mike gathered up his papers and folders and then he pulled out a duplicate set of the materials he had just used with John and handed them to John for his review and subsequent use. John was once again displaying the bursting-from-the-seams smile that Mike was used to seeing. "Mike, I will say that I had serious

doubts about this initiative. Frankly, I was wrong. However, I still am not sure if the approach you have taken for the 'Phase 0' is a stroke of luck or brilliance.”

Mike paused and said calmly, “I think it is a combination of intuition and perseverance.”

John then extended his hand with enthusiasm. “Well, whatever the case, the approach is very sound, especially given the nature of this initiative.” They shook hands and Mike turned to go. “Mike, just one more question. It’s obvious you got some outside assistance with this. I am curious. Which of the big consulting houses or research groups did you rely on?”

Mike smiled. “Would you believe I got help from a sales representative for one of the eBusiness providers?”

John laughed.

“Well, that certainly is a first. I didn’t know vendors were armed with these types of frameworks and supporting tools.”

“Apparently this sales rep was introduced to the framework and supporting tools by one of his previous clients.”

“Well please give my best to the rep,” said John. “And tell him that I look forward to meeting him sometime in the near future.”

Mike was halfway out the door when it occurred to him that maybe he should meet with John the next day, if that were possible. He ducked his head back inside John’s office.

“John, would it be possible for us to meet tomorrow at 9 a.m. for a couple of hours?” John buzzed his assistant and asked her to make the necessary changes to his schedule.

See you at 9 a.m.,” John said.

As Mike walked back to his office, he realized he was once again humming the Rocky theme song. “Gonna fly now.”

$$1 + 1 + 1 = 5$$

Halfway to his office his watch beeped. It was 12 p.m., and immediately he started to feel hungry, just as if he were one of Pavlov's dogs. Moments later, he was standing in the cafeteria line waiting for yet another of the countless blue plate specials the kitchen cranked out day after day. Tuna surprise today. Or some kind of surprise. He set the plate on his tray, paid the cashier and walked into the general seating area. He saw Sue Jacobs sitting with three members of her team at a table near the windows, and she waved him over.

"Hello Mike," she said. "How did your meeting go with John?"

"In the spirit of 'singles win the World Series,' I would say we hit a single."

Sue smiled and acknowledged Mike's comment as she introduced the members of her team and invited Mike to join them at their table. Mike and Sue spent the next twenty minutes reviewing the details of Mike's meeting with John. Mike went out of his way to make sure he covered all the details of the meeting. As they returned their trays and walked out of the cafeteria, both of them reaffirmed their commitment and confidence to what they were trying to collaboratively achieve.

When Mike got back to his office, he quickly began organizing his thoughts. He wanted to make sure that he was amply prepared for both his meeting with John the next day and the meeting with the leadership team next Monday. As usual, he recorded his thoughts in his journal.

Day #51 - Final Preparation for "Phase 0" Leadership Briefing

- Meeting with John went very well.
- Need to work on getting to the point faster (this should occur with practice).
- John and I will meet tomorrow for two hours to collaborate on the remaining "20%" and finalize the materials we will use for the "Phase 0" Leadership briefing.
- Intend to call Kevin Cooper today to schedule a meeting to work through high-level pricing for a variety of eBusiness infrastructure configurations.
- Everything appears to be on track, but need to ensure no details are inadvertently overlooked.

Mike put down his pen, looked up Kevin Cooper's phone number in his PDA, and dialed. Kevin answered on the third ring.

"This is Kevin Cooper speaking."

“Good afternoon Kevin, this is Mike Abernathy.”

“Hello Mike. I was hoping I would hear from you regarding the success of your meeting with John.”

“Everything went very well. He appreciated everything I went through and feels comfortable that, with a couple of additions, we will be ready for the ‘Phase 0’ leadership review next Monday.”

“I’m very happy for you and John. Is there anything I can do with regards to helping you with the additions you need to add?”

Mike made a mental note as to the sincerity of Kevin’s congratulatory comment and his consistent desire to want to help.

“Yes, Kevin,” said Mike. “I do have a couple of additions which I think would be of interest to both of us.”

Mike paused, and before he could continue, Kevin jumped in.

“Would you like to cover them over the phone, or would you like to get together?”

Mike looked at his schedule.

“How about tomorrow afternoon at 2:00?”

“That works well for me,” said Kevin. “What should I bring along to make sure that our meeting is as productive as possible?”

Mike paused again, and then responded.

“Kevin, I’m looking to get some preliminary pricing for a few alternative eBusiness infrastructure configurations.”

“Not a problem,” said Kevin. “I’ll bring along the information and tools that we can use together to configure the different alternatives.”

“Very good Kevin, I look forward to seeing you tomorrow,” said Mike, and then hung up the phone.

For the next five minutes, Mike sat in his chair thinking about the sudden burst of progress he had made over the past week. It was very clear to him that he would have been in “The Gap” with John had he not met Kevin Cooper. Mike began to consciously review all of Kevin’s actions to date. Then he started comparing and contrasting his interactions with Kevin versus those he had had with the literally hundreds of other reps he had dealt with in the past. Kevin’s approach was dramatically different from the typical approach he had been conditioned to expect.

Mike recalled attending a somewhat humorous but insightful session at an IT conference called “Sales Methodologies of Vendors - Protect Yourself.” The session provided an overview of the industry standard “household” methods currently being adopted and deployed by leading and emerging vendors. Mike remembered a number of key “take-a-ways” from the session. First, the methods left him feeling that reps were being trained and compensated to “process” their prospects and customers. Second, the methods assumed that prospects or customers both knew the answers to a bunch of open-ended questions and would feel comfortable sharing them. Third, the methods and forms filled out by the reps were for “internal use only” and seemed to only be of value to their management for inspection and forecasting purposes.

In contrast, Mike had not once felt like he was being “processed” by Kevin. Instead, he felt Kevin always had his interests in mind. That he consistently led by giving something to assist Mike in doing a better job. And all the while he gave, he seemed to never expect anything in return. In addition, when Kevin did raise a question, he rarely used open-ended questions. Instead, he always led with a “straw man” visual and then used directed questions with a sincere interest in refining and revising the visual to “get it right.”

Finally, Kevin had never used vendor-speak to state his desire to create a partnership. Instead, he had used a framework with supporting tools that both focused the collaborative energies on the task at hand and created valuable deliverables (visuals, documents, etc.) for subsequent use.

Kevin’s actions spoke far louder than the words Mike was accustomed to hearing from vendors. It was very clear to Mike that Kevin was not using any of the industry standard household sales methodologies. Kevin had mentioned repeatedly to Mike that he was introduced to the *Dimensions of Success* framework and supporting tools by one of his previous clients. Well, regardless of how Kevin had come to learn of the framework and supporting tools, Mike was glad Kevin had adopted it and, as a result, introduced it to Mike.

Building Momentum...

Kevin was pleased that Mike's meeting with John had been a success. He was also pleased that Mike was inviting him to configure a number of alternative eBusiness infrastructure configurations for inclusion in the "Phase 0" Leadership review session. Kevin knew he would have the remainder of the day to make sure he was ready for his session with Mike tomorrow.

As Kevin reached for his notebook, he was thinking about the ground he and Mike had covered in the past week. A week ago, he had limited information and access to MI's eBusiness initiative. He chuckled as he thought about the account turnover call he had with Ken Galloway. He was happy he had avoided the temptation of jumping to any conclusions without first doing his own due diligence.

Once again, history was very quickly repeating itself. However, Kevin knew not to fool himself with regards to the surprisingly fast rate of progress he had made with Mike and MI. He knew part of his success was simply due to timing. Experience had shown Kevin that the lapsed time could vary from days to months, but the results were almost always the same.

Over some period of time he would demonstrate his personal and professional value through the facilitation and use of a collaborative framework and supporting tools. As a result, he would accelerate the likelihood that a potential customer would trust him, ultimately improving the odds of earning their business.

Kevin opened his notebook to update his plan.

Day#7 - Plan for MI (Updated)

- Very pleased to know that Mike's meeting with John went well.
- Also very pleased with the progress I appear to be making in earning Mike's confidence.
- His optimism as a result of his meeting with John would suggest that he and John believe that MI's eBusiness initiative will stay on the "Fast Path."
- To the extent this is true, it increases my odds to sell ISAP offerings.
- Will meet with Mike tomorrow to get a more detailed update and provide configured examples of ISAP's eBusiness infrastructure capabilities.
- Need to make sure that the different examples of ISAP's configured capabilities are within the context of the *Dimensions of Success* framework and supporting tools.

Kevin reviewed his notes and then shifted gears to begin work on configuring ISAP's integrated capabilities. He knew he had to follow a two-step process to ensure he hit the mark with Mike tomorrow. First, he would have to accurately configure examples of ISAP's integrated capabilities. Second, he would have to show visually how ISAP's integrated capabilities could enable MI's priorities (organizational, operational, and infrastructure) and also contribute to MI's criteria (ROA, ROI, TCO) to create value.

As Kevin reached for his laptop to begin tackling the task at hand, he said quietly to himself, "Now is the time to start introducing the potential business value of ISAP and its offerings!"

History Does Not Always Repeat Itself...

Mike's digital watch beeped and he knew it was 2:00 pm. A minute later he began to wonder if Kevin were running behind when his phone rang.

"Good afternoon, Mike. This is Kevin. I'm down in the visitor's lobby."

"Hi Kevin, give me a minute and I'll be right down."

Mike greeted Kevin in the lobby, and for a moment it was déjà vu, the two men following the same path as the first time they had met. Shaking hands by the security guard desk. Securing a visitor's badge. Walking towards the cafeteria for a cup of coffee.

"Can I get you a soda or a cup of coffee?" said Mike.

"Thanks for the offer, but no thanks," said Kevin. "I'll wait for you over at the exit, same as last time."

Mike nodded and proceeded for the coffee line, chuckling slightly when he thought about the fact that last week he assumed the vendor would pay for his coffee and now he was the one offering to buy!

Ten minutes later they were sitting in Mike's office, Mike with a double café latte in his hand, Kevin sitting in the corner chair opposite the desk, Mike's coat carefully placed on the credenza, papers and folders at Kevin's feet, Kevin sitting so he could not see the confidential information on the white board. Mike had noticed during their first meeting that Kevin respected what was private. Since then, the emotional atmosphere between the two men had improved greatly precisely because Kevin was what he seemed to be: honest, sincere, and genuine.

"Mike, how would you recommend we spend the next two hours?" Kevin asked.

Mike paused, sifted through some notes, and then focused his eyes on Kevin.

"First," said Mike, "I would like to recap the activities that transpired since we first met leading up to my meeting with John yesterday. Second, I would like to review the specifics from my meeting with John yesterday as well as the one we had this morning. Third, we need to identify three different eBusiness infrastructure configurations that John and I can use for next week. And finally, we need to make sure that you and I clearly define our next steps and expectations going forward."

"Sounds great," said Kevin, who pulled out a pen and notebook. For the next thirty minutes, Kevin took copious notes as Mike provided a detailed update. Kevin was very

pleased to learn that Mike had taken a lot of what Kevin had offered to mind and, more importantly, he had used the information. The more that Mike shared, the more clear it became to Kevin that Mike was now truly facilitating a collaborative process with his colleagues to ensure the early-on and ongoing success of MI's eBusiness initiative.

When Mike finished going over the details of his session with John from that morning, he sat back in his chair, a relaxed smile spreading across his face. Then he leaned forward, a new thought on his mind.

"Kevin," he said, "I'm curious about something. You have said repeatedly that the framework and supporting tools you provided to me were introduced to you by one of your previous clients."

Kevin nodded.

"That's true."

"Well, how would you compare what we have done over the past seven days with what they did?"

Kevin nodded, reflected on what Mike had asked, and then spoke with calm detachment.

"Mike, I think I know what you're asking me, but I need you to clarify your question."

"Well," said Mike. "If you were going to provide an objective assessment as to how we are doing using the *Dimensions of Success* framework and supporting tools, as compared to your previous clients, how would you grade our efforts?"

Once more Kevin nodded, reflecting on what Mike had said. Then he focused squarely on Mike and shifted to the edge of his chair.

"I have a couple of thoughts for you, Mike, but they might not be what you are expecting to hear."

Mike became silent. Kevin continued.

"The intent of the framework and supporting tools that I introduced to you is to ensure that a business initiative or solution gets on and stays on the "Fast Path." Together, the framework and supporting tools serve as means to qualify a business initiative or solution early-on in the process. For an initiative, the degree of fit in each of the three dimensions (Priorities, Requirements, Criteria) within the *Dimensions of Success* framework should help determine if and how to best proceed."

Kevin paused to see if what he was saying made sense, and then he continued.

"I have had many clients use the *Dimensions of Success* framework and supporting tools only to realize they should not pursue a business initiative or solution. I have had others

who used it as a way to prioritize and portfolio manage a group of initiatives. Other clients used the framework and supporting tools as a means to consistently communicate the status of a business initiative or solution to key stakeholders.”

Kevin could see Mike was deep in thought as he proceeded.

“The value that all of those clients realized,” said Kevin, “even though they were applying them differently, comes back to the value of time. In all cases, both opportunity costs (the cost of an initiative/solution) and opportunity losses (delay in the realization of the intended value of the initiative/solution) were reduced.”

Mike thought about the reality of this statement a moment and then said, “So the risk I ran unknowingly was that I could have qualified myself right out of a job!”

Kevin did not take the bait.

“Mike, that risk has existed from the very first day you accepted the responsibility as project leader for MI’s eBusiness initiative. All the framework and supporting tools did was help crystallize and substantiate what you and others within MI already knew to be the case intuitively. Up until seven days ago, you and others within MI simply lacked the ability to codify and clarify your intuition.”

Kevin paused yet again, noted that Mike had already come to the same conclusion, and continued. “Without the framework and supporting tools that I provided, I am confident that you would have eventually figured out a way to get MI’s eBusiness initiative back on track. However, while you were figuring that out, the opportunity costs and opportunity losses for MI’s eBusiness initiative would have been rising.”

Mike nodded as he internalized what Kevin was suggesting.

“Let me put it another way,” said Kevin. “Suppose as a result of your efforts and your meeting yesterday with John, the leadership team decided that MI should pull the plug on this eBusiness initiative. I would suggest that everyone, and especially you, would have been better off, and my reason for saying this is that MI’s opportunity costs and opportunity losses would have been dramatically reduced.”

Mike sat in silence a moment, digesting everything Kevin had said. Then smiled at Kevin, a smile of recognition and understanding.

“Well, Kevin, you were right, I was expecting a much simpler answer! But as I think about what you just shared, I realize that success is relative. Whenever more time is spent than necessary, we are increasing both our internal costs (costs for the initiative) and opportunity losses (delay in the intended value to be realized).”

“Bingo!” Kevin said, returning the smile.

“Oh, yeah,” said Mike. “Bingo! And given that time is money, I think we should get back to the task at hand. Let’s talk about alternative eBusiness infrastructure configurations.”

Kevin reached into the pile of materials he had at his feet and brought forward three stapled documents. Mike spread the three out and each had a cover page. The three cover pages were titled *Integrated Capabilities #1*, *Integrated Capabilities #2*, and *Integrated Capabilities #3* respectively. Mike, anxious to jump in, said, “Let’s see what you got!”

“Sure,” said Kevin. “But before I go through the details, I think it’s important for you to understand how I configured ISAP’s integrated capabilities and how I visualized the integrated capabilities within the context of the *Dimensions of Success* framework.”

Mike suddenly became puzzled.

“Kevin, I simply asked you for configurations.”

“Not to worry,” said Kevin. “I have those for you Mike. But let me explain. Remember in one of my earlier emails I suggested that individuals, based on their respective roles and responsibilities, speak different languages, and that when these individuals get together there needs to be a protocol or language converter to get everyone on the same page.”

Mike nodded for Kevin to continue.

“Well,” said Kevin, “the IT configurations will mean something to you and John because they are in the language you naturally speak. However, for Sue, Jim, Doug, and the others to understand them, they need to be translated into their native tongues. Put another way, you and John have a need to understand the nuts and bolts or the “what.” Sue, Jim, Doug and the others want to know the ‘so what.’”

Kevin walked through in detail how he put together the configurations and the supporting integrated capabilities visuals. As expected, Kevin and Mike worked collaboratively to revise and refine the configurations and integrated capabilities visuals. Kevin then collected the three originals with the marked up changes and promised to update and forward them electronically to Mike’s attention before the start of business tomorrow.

And just like that two hours had flown by. It was 4 p.m. and Mike’s watch was beeping. Realizing that he was late for his monthly staff meeting, Mike quickly turned to next steps. The two men both agreed that they would conference call at 2 p.m. on Thursday to check in. In the interim, if Mike thought of anything where he believed Kevin could be of value, he would give him a call.

As Kevin collected his belongings, Mike stood up with the kind of look on his face that suggested he had something important to say, but wasn’t sure how to say it. When Kevin turned towards the door, Mike spoke.

“Kevin,” he said, “I want you to know that I was wrong about you at first. I had assumed you would be just another self-serving sales rep. Further more, the personal character traits you have demonstrated and the professional contributions you have made over the past seven days are sincerely appreciated and valued.”

Kevin could see that Mike wanted to say more but was earnestly struggling to share his thoughts and feelings. In an effort to lighten the mood, Kevin countered with an honest, half-joking comment about the nature of sales reps in general.

“Mike, the truth is that most sales reps aren’t bad people. They’ve just been taught to use methods that individuals in your position do not value.”

Mike chuckled. Kevin continued.

“Seriously, however, I do appreciate your feedback. I’m very grateful we’ve been able to cover a great deal of ground in a very small period of time. The individual who introduced me to the *Dimensions of Success* framework and supporting tools was the same person who said to me that to be a successful salesman, you must focus on service. ‘If you expect to sell,’ he said, ‘you must first serve. That’s what it’s all about. Service. I am only trying to treat you in the manner that I would like to be treated.’”

Mike and Kevin walked swiftly to the visitors lobby, and after a quick handshake and good-bye, Mike raced off to his staff meeting. As Kevin walked out of the visitors lobby into a clear, sunny afternoon, he was smiling. He knew that if in fact MI proceeded with their eBusiness initiative, he and ISAP were now in a position to successfully compete and earn their business.

Business As Unusual...

With his usual double café latte in one hand and his briefcase and coat in the other, Mike went through his usual fumbling to unlock his office door. Moments later, with his coat thrown in the corner, he opened his laptop and logged on to his email system, scanning for the email from Kevin.

As anticipated, Kevin's email was waiting for his review. It was a recap of yesterday's session, a couple of details regarding the updated configurations and integrated capabilities visuals which were attached, and a closing comment wishing Mike continued stamina over the next couple of days as he, John, and Sue finalized their preparation for the "Phase 0" Leadership review. There were also the expected attachments, which Mike printed and then spread out on his desk.

Fifteen minutes later, Mike pulled out his journal. It was time for another entry. He needed to document the result of his meeting with Kevin and the materials he had just reviewed.

Day #53 - Meeting with Kevin Cooper (120 Minutes)

- Meeting with Kevin was both valuable and enjoyable.
- Like the fact that Kevin continues to challenge me in new and creative ways.
- Provided a brief history of what had transpired since we had last met.
- Walked him through how we had applied the *Dimensions of Success* framework and supporting tools to MI's eBusiness initiative.
- While impressed with our progress, he ENLIGHTENED me with regards to the many different ways other clients were using the framework and supporting tools successfully.
- Focused on the configurations to ensure they were logically sound for high-level planning purposes.
- Then focused on how to translate the nuts and bolts of the configurations (the "WHAT") into the something that would have meaning (the "SO WHAT") for those not comfortable with the language of IT.
- Kevin offered something he called the "Integrated Capabilities" visual as the means to create the "SO WHAT."
- Stated that the Integrated Capabilities visual first acts a protocol converter to restate an IT configuration into an integrated capabilities statement that can be more easily understood by non-IT professionals.
- Stated that it then acts as a means to visualize the correlation in infrastructure investments (green) to the expected value of operational (yellow) improvements (efficiency gains, cycle-time gains, effectiveness gains).

- Showed how the Integrated Capabilities visual explicitly links to BOTH the PRIORITIES dimension (links to the lower right corner of the Alignment of Priorities Visual), and the CRITERIA dimension (links one-for-one to the TCO (green), ROI (yellow), and ROA (red) layers of the Value Proposition visual) within the *Dimensions of Success* framework.

SAMPLE INTEGRATED CAPABILITIES STATEMENT

ISAP's Integrated Capabilities

ECONOMY

INDUSTRY

FINANCIALS

GOALS STRATEGIES

Customer Relations: Processes needed to expand relationships with current customers through existing and new channels.

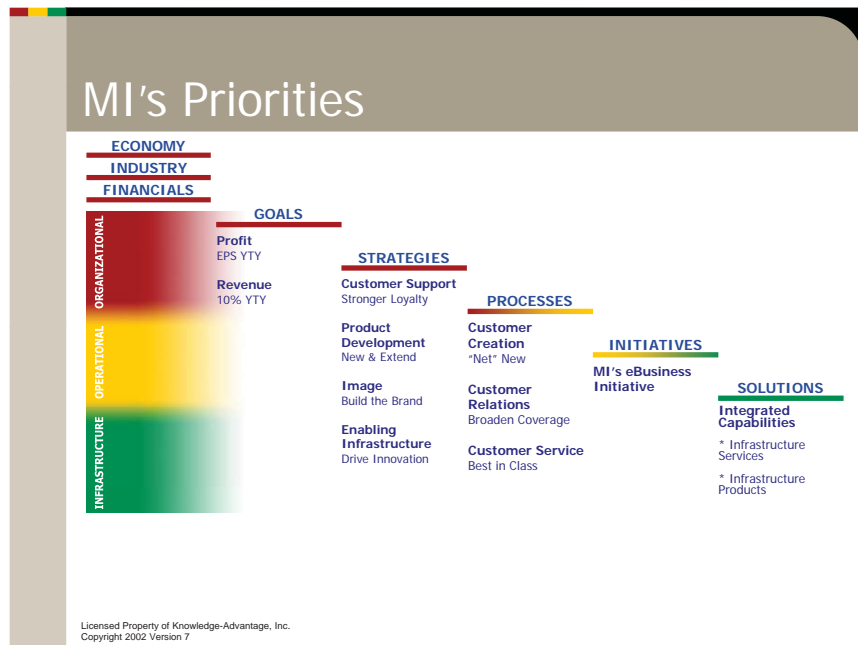
	Efficiency Gains (FREE UP RESOURCES)	Cycle-Time Gains (FASTER THRU-PUT)	Effectiveness Gains (BETTER RESULTS/OUTCOMES)
POTENTIAL VALUE	<ul style="list-style-type: none"> Better sales & marketing resource utilization Ability to dynamically rebalance sales and marketing resources based on availability and/or scarcity Reusable tools across sales and support planning spectrum 	<ul style="list-style-type: none"> Consistent cross functional approach within MI Instant access to pertinent information to drive cross-selling opportunities Collaborative (Client-driven) approach to compress elapsed selling times 	<ul style="list-style-type: none"> Expanded/deeper coverage of new and existing customers Enhanced relationships through customer-centered collaboration Higher customer value/margin thru better customer "engagement" experiences and reduced SG&A to support

Integrated Capabilities

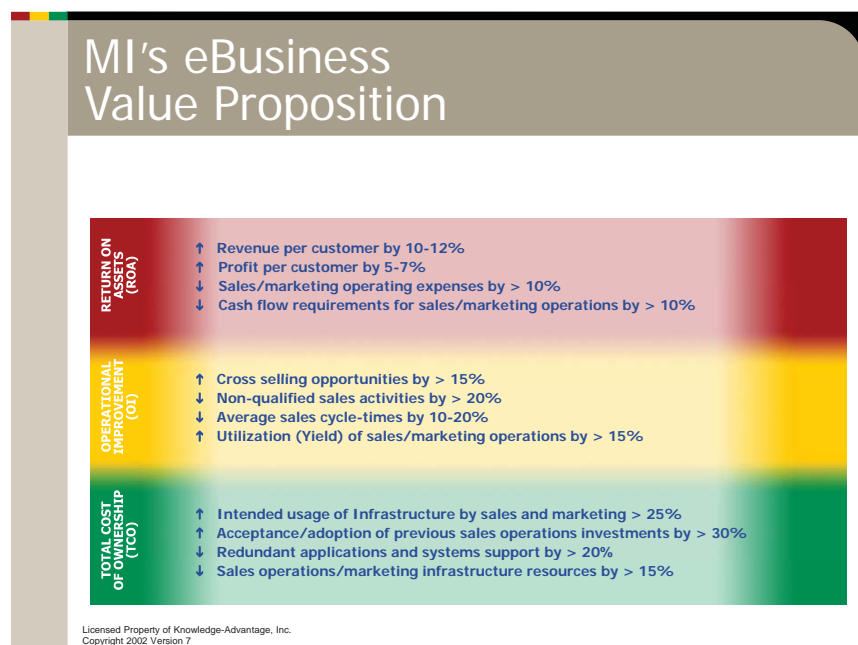
Integrated Services and Products (ISAP)
 Infrastructure Services – Implementation Design & Delivery
 Infrastructure Products – Architected "Open", Always "On"

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SAMPLE INTEGRATED ALIGNMENT OF PRIORITIES



SAMPLE VALUE PROPOSITION



- Converting from “configuration-speak” to “integrated-capabilities-speak” was a difficult but valuable exercise. It highlighted how easy it is to have language barriers get in the way of effective communication between well-intended individuals representing different categories (Organizational - RED, Operational - YELLOW, Infrastructure - GREEN) of stakeholders.

Actions Going Forward

- Will first continue to refine the Integrated Capabilities Statements with the automated aid provided by Kevin.
- Then will take the *Dimensions of Success* framework and the supporting visuals (Alignment of Priorities, Value Proposition, “The Gap” visual, the Assessment Question responses, Integrated Capabilities Statements) created and weave together a compelling storyline.
- Plan to check point with Kevin on Thursday afternoon.
- A dry run of the completed storyline to occur with John and Sue Friday morning.
- Friday afternoon is reserved for last minute revisions.
- Plan to relax and spoil my fiancée over the weekend!
- WILL hit a single on Monday!

Mike closed his journal, taking a big sip of his double café latte while he thought about the next few days. With a smile on his face, he turned to the task at hand which was to first make sure the integrated capabilities statements were accurate and translated to *non-IT-speak*. Then he would begin weaving the key visuals that supported each of the dimensions within the *Dimensions of Success* framework together. Mike was confident that the result would be a compelling storyline of why MI should aggressively proceed with its “Seize the Moment” eBusiness initiative.

Mike took another sip and started to work.

“Failure is not an option,” he said to himself.

“And singles win the World Series!”

First-Hand Evidence...

Kevin sent an email to Mike and then opened his notebook to update his plan.

Day#9 - Plan for MI (Updated)

- Meeting with Mike, based on his feedback, went very well.
- I believe Mike now understands both the reasons for and the “how to” of converting an IT configuration into an integrated capabilities statement.
- Based on numerous experiences with previous clients, Mike will most likely be challenged with the exercise of language conversation from “configuration” to “integrated capabilities statement” (Infrastructure - GREEN) to the correlation of operational impact (Operational - YELLOW) to organizational results (Organizational - RED).
- Working through and internalizing the conversion process will prove to be invaluable to ensure the early-on and ongoing success of their eBusiness initiative.
- Forwarded to Mike “80% complete” examples of integrated capabilities statements.
- I am confident that Mike, John, and Sue will provide the remaining 20% to make them complete for the upcoming “Phase 0” Leadership review session.
- Currently scheduled for a conference call on Thursday at 2:00 to “dry run” the materials Mike plans to share with the leadership team.
- At this point my ability to make additional contributions is somewhat limited.
- I feel confident in the team’s (Mike, John, Sue) ability to effectively deliver the message.
- Have made myself available via mobile.
- Other than requests from Mike, I will focus my energies on building out my account development plans for my other three assigned accounts.
- I am very optimistic that they will succeed, and as a result create a significant opportunity for both ISAP and myself.

Kevin reread his notes a couple of times. He thought it accurately reflected his thoughts and planned actions. Then, feeling comfortable with the direction that Mike and MI were taking, he shifted his focus to his other assigned accounts.

Two days later, first thing Thursday morning, Kevin received an email from Mike with an attachment containing the entire set of materials Mike planned to use for the “Phase 0” leadership team. Kevin spent the majority of the morning going over the content of the materials and the logical flow Mike planned to take during the session. Pleased with what he reviewed, Kevin turned again to his notebook to update his plan.

Day #11 - Plan for MI (Updated)

- Just received the entire set of materials Mike plans to use for the “Phase 0” leadership session.
- Contents include completed *Dimensions of Success* visuals (Alignment of Priorities, Integrated Capabilities Statements, Value Propositions, and responses to the Assessment Questions) and other key deliverables (project plan, expected resource requirements, investment requirements, expected returns over predefined timeframes, risk mitigation plan, etc.).
- At first glance, it appears to be a complete set of materials for next Monday’s session.
- I am very pleased that Mike felt comfortable sharing the entire packet.
- Other than removing ISAP’s name, the configurations are as Mike and I created.
- Plan to be an objective sounding board for Mike during today’s conference at 2:00.

Kevin looked at his updated notes. He was extremely pleased at how well he had been able to help Mike and MI and what that might mean for the future. Regardless of the outcome of next Monday’s meeting, Kevin knew that other opportunities would present themselves at MI. And, to the extent that Mike was involved, Kevin would be presented with a fair chance to compete for and earn the business. Kevin thought this was a small but significant achievement given how Mike and MI had perceived ISAP just a little less than two weeks ago.

At 2:05 Kevin’s phone rang. Kevin picked up the receiver after the second ring. “Good afternoon, this is Kevin Cooper speaking.”

“Afternoon Kevin, this is Mike,” the voice carried with it an echo-quality. Mike was talking on a speakerphone. “I apologize for being a few minutes delayed.”

“Not to worry Mike. It gave me a few extra minutes to review the materials you forwarded this morning.”

“Kevin, I have with me John Topkins, our CIO, and Sue Jacobs, our head of Sales and Marketing.”

“It’s good to meet you,” Kevin said without hesitation. “I certainly feel as if I have already met you both based on working so closely with Mike over the past couple of weeks.”

John was the next to speak.

“It’s nice to meet you as well Kevin,” he said. “Mike has been very impressed by your contributions thus far. And frankly, based on my limited exposure, I too am impressed.”

Then it was Sue’s turn.

“Kevin,” she said, “I just wanted to say thank you for helping the three of us to get on the same page. In my opinion, this has been one of the best joint efforts I have had with John and his IT group since I joined MI. We are truly working collaboratively and communicating effectively with regards to our ‘Seize the Moment’ eBusiness initiative.”

Kevin was certainly flattered by both John and Sue’s comments, but wanted to give credit where credit was due.

“Well thank you all for your kind words,” said Kevin. “But in truth, I think you are the ones who deserve the compliments. It is truly impressive what the three of you have been able to accomplish in such a short period of time. And, given time is of the essence with regards to Monday’s meeting, how can I be of the greatest assistance during our time together today?”

Kevin could hear papers shuffling as one of them was looking for something. Then it was Mike’s voice on the phone.

“We have a few of questions for you. First, we have a question regarding the configurations you provided. We also have a question about to how to best introduce and use the *Dimensions of Success* framework and supporting tools.”

“Sounds great,” said Kevin. “Where would you like to start?”

After a pause, John took charge.

“Let’s start from the top with our questions regarding the configurations you provided.”

The question regarding the configurations took about ten minutes to answer. First, they were interested in knowing the availability and throughput assumptions that were made when sizing the equipment portion of the configurations. Second, they wanted to confirm the labor rates and breakdown of labor hours for the services portion of the configurations. Feeling comfortable with the configurations, Mike then moved to his question regarding the *Dimensions of Success* framework and supporting tools.

John tried to frame the question in the clearest possible terms.

“We believe we are comfortable with each of the key visuals,” said John, “the Alignment of Priorities, the Value Proposition, ‘The Gap,’ the responses to the Assessment Questions, and the Integrated Capabilities Statement, as well as the underlying content that supports each. But we are struggling with what is the best order to present them, given the extreme ‘TYPE A’ nature of our audience. How would you order the sequence of these visuals?”

“First of all,” said Kevin, “that is a great question! Based on my experience with other clients, the best order for the visuals is based on the type of scenario you are dealing with. In other words, based on a given scenario, the sequence of the dimensions

(Priorities, Requirements, Criteria) within the *Dimensions of Success* framework is prioritized, and this prioritization in turn then determines how to order the key visuals.”

There was a long pause.

Sensing he had gone too fast Kevin provided additional context.

“Let me try to clarify what I mean,” he said. “There are five typical scenarios. For our dialogue, I will focus on two. These scenarios are Demand Creation and Demand Management. Demand Creation is a scenario in which you are trying to get an executive team to recognize the value of a business initiative or solution. Demand Management is a scenario in which the executive team already recognizes the value of a business initiative or solution. In a Demand Management scenario what is most critical is to ensure that you manage the early-on and ongoing success of the initiative or solution.”

“Given your definitions,” said John, “this is clearly a Demand Management scenario based on the fact this whole initiative started on an intuitive set of hunches by Jim Bowman, our CEO.”

“That’s my feeling as well,” said Kevin. “And because this is a Demand Management scenario, the ideal sequencing of the dimensions within the *Dimensions of Success* framework would be REQUIREMENTS first, CRITERIA second, and PRIORITIES third. Then by linking the key visuals to the dimensions, you can determine the ideal order for sharing your findings.”

Once again Kevin could hear papers shuffling, and after a brief moment of silence, John spoke up.

“Kevin, let me see if I followed you. Because we have classified this as a Demand Management scenario, the ideal sequencing of the dimensions within the *Dimensions of Success* framework is REQUIREMENTS first, CRITERIA second, and PRIORITIES third. Given that, the ordering of our visuals would be ‘The Gap,’ Value Proposition, Alignment of Priorities, and Integrated Capabilities.”

“Perfect,” said Kevin. “What I recommend you do next is take all of your supporting materials and inventory them as drill-down reference resources for each of the four key visuals. For instance, I would position the Assessment Questions and the responses that you collectively developed as a drill-down resource for ‘The Gap’ visual. Another example would be to position your cash flow analysis as a drill-down resource for the Value Proposition visual. And, of course, you can position the configuration we reviewed earlier as a drill-down resource for the Integrated Capabilities visual.”

The next voice was Sue’s. “The bulb just went off for me, Kevin,” she said. “What you are suggesting is that we inventory all of our supporting deliverables within the context of the *Dimensions of Success* framework. Then we sequence and use the key visuals

(‘The Gap’, Alignment of Priorities, Value Proposition, and Integrated Capabilities Statement) with the leadership team based on the scenario. When asked, we provide the underlying detail to substantiate our thinking.”

“That’s it,” said Kevin.

“I like it,” said John. “It’s visual, logical, speaks to the individual and collective interests of the leadership team, and provides a context to drill into the details when asked or required.” John paused a moment and then asked, “Sue, are you thinking what I am thinking?”

Sue laughed.

“I am not sure what you’re thinking, John,” she said. “But I was just thinking about all the time we’ve spent in the past in our leadership meetings brainstorming. Based on what we just walked through with Kevin, it seems as if we always brainstormed at one of two extremes. Either we were way too lofty in our discussions or way too granular in the nitty-gritty details.”

“Exactly,” said John. “And because we never had a framework to help us focus our brainstorming, we always left out or skipped over all the things in the middle.”

Kevin waited a moment to let the importance of this new insight sink in. Then he spoke up. “John, I call what you and Sue just described as the ‘1-2-10’ phenomena. What I mean by the phrase is this. When a highly intuitive executive team is presented with a problem (step 1), they identify a potential answer (step 2) and then they leap to a conclusion (step 10). Sometimes the conclusion is entirely too lofty, and other times it gets bogged down in the nitty-gritty details. To drive the point home, if you look at what we have been doing over the past week, I would suggest that we have been working on the 3-4-5-6-7-8-9 of MI’s eBusiness initiative. As a result, you now have an explicit ‘1 through 10’ understanding and the means to visually communicate your findings.”

There was a murmur of agreement on the other end and then it was John’s voice.

“Kevin, I would like to commend you for what you have provided us. It is profoundly simple.” John paused and then continued. “You have provided us with a visual structure that allows us to efficiently use good sound business logic to evaluate and position our business initiatives and solutions. And through the same visual structure you have provided us with the means to effectively communicate our findings with explicit consideration to our individual and collective interests. I’m sure I’m taking a little poetic license here, but, to use your phrase, The *Dimensions of Success* framework and supporting tools provide a ‘1-2-10’ approach to ensure that we take a ‘1 through 10’ approach when evaluating and positioning our business initiatives or solutions.”

Everyone chuckled as they thought about John's comment, and when the laughter subsided, Kevin spoke up.

"Thank you for your very kind words. And, to your point, if the framework and supporting tools serve as a collaborative and visual reminder for the underlying details that need to be done to ensure the early-on and ongoing success of a business initiative or solution, then I whole-heartedly agree with your poetic license."

And then realizing that they had come to the end of a very productive conference call, Kevin added, "Is there anything else I can do to assist in your preparation for Monday?"

"I think we're in good shape, Kevin," said John. "We're going to dry-run the flow a couple of times tomorrow morning. Mike will have the afternoon to make any refinements if necessary."

"I'll send you our final package tomorrow around lunch for your review," Mike chimed in. "Check your email. And if we don't talk before the weekend, please know that we will call you Monday afternoon to provide you with an update based on the 'Phase 0' Leadership review session."

"Sounds great," said Kevin. "I wish all of you success on Monday morning and I look forward to reconnecting Monday afternoon."

Then Kevin hung up his phone and turned to his notebook to update his plan.

Day #11 - Plan for MI (Updated)

- Conference call with Mike occurred as planned.
- Nicely surprised by John Topkins and Sue Jacobs being in attendance.
- Addressed a couple of configuration questions and reviewed how different scenarios determine the sequencing of the dimensions (PRIORITIES, REQUIREMENTS, CRITERIA) within the *Dimensions of Success* framework, which then determines the order of the key visuals (Alignment of Priorities, "The Gap," Value Proposition, Integrated Capabilities Statement, etc.).
- It is clear they are going forward as a unified team.
- They have a solid plan that I expect will be well received by the leadership team.
- They volunteered to forward electronically the complete set of materials they plan to use for Monday once they are finalized.
- At this point it is out of my hands.
- I am very confident that regardless of the outcome of next Monday's meeting, I will have the opportunity on behalf of ISAP to compete for some portion of MI's eBusiness infrastructure requirements in the near future.

After his update, Kevin began checking his email. He was lost in thought reviewing 27 new messages, when he heard his name being called. Looking up from the screen, eyes blinking as he adjusted to the line of vision, he saw Marsha Lambert, his VP of Sales and Marketing, walking towards him. Kevin moved quickly to meet her. Marsha, smiling, extended her hand.

“How are things going for you so far?”

“Well,” said Kevin, “I would say I am very pleased with my initial progress.”

Marsha, still smiling, continued.

“That’s why I stopped by,” she said.

Kevin paused, wondering where the conversation was going.

“I just got a call from John Topkins over at MI,” she said, and then she paused on purpose to see what type of reaction Kevin would volunteer. Kevin nodded in recognition of her comment but provided no real emotional signals. He simply waited for her to continue. Noting to herself Kevin’s emotional maturity, Marsha continued. “John called to thank me for assigning you to MI,” she said, “and to make sure that I knew your contributions were greatly appreciated and valued.”

Kevin smiled graciously. Marsha put one hand against the wall.

“After John called I remembered that we had agreed to get together and talk about the sales methods and tools that one of your previous clients had introduced you to. Given the timing of John’s call, and the fact that almost two weeks have lapsed since we first had lunch, I wanted to schedule some time to get together. I am very much interested in continuing our dialog.”

Objectively, Kevin asked, “When would you like to get together?”

“Well,” said Marsha, “I just had a client cancel a visit that was scheduled for tomorrow afternoon. Why don’t we get together at 3 p.m.?”

Kevin knew precisely what his schedule looked like.

“That sounds great,” he said. “I’ll come to your office at 3 p.m.”

With that they shook hands and went their separate ways.

Good For The Goose... Good For The Gander...

The following day at 2:55 p.m. Kevin headed for Marsha's office. He couldn't help but recall the last time he attempted to get to Marsha's office. He had been more concerned with getting lost than anything else. Now he knew the way there without thinking.

At 3:01 p.m. Marsha opened her door and walked out to greet Kevin.

"Good afternoon, Kevin." They shook hands, and Marsha invited Kevin into her office and motioned for him to sit by the window in one of the two armchairs on either side of a table. The chairs offered a view of ISAP's garden area. Marsha grabbed a notepad and bottle of water from her desk.

"Would you care for bottled water, a soda, a cup of coffee?"

"Thanks," said Kevin, "but I'm fine."

Marsha sat down, arranged her notepad and water on the client conference table, and then focused on the young man sitting next to her. "Kevin, I think it is important for me to start by telling you, that I was not sold on hiring you at first. Frankly, it was only because of your references from previous customers that I went against my intuition and extended you an offer."

Kevin waited, knowing that Marsha was not finished.

"From an integrity perspective, I wanted you to know explicitly where I stood then and also where I stand now."

Marsha pausing for a moment, choosing her words carefully.

"I'm still not sure anything has changed. My reason is that while you have proven to me you can serve our customers, I am still not convinced you know how to sell to them."

Kevin leaned forward in his chair and responded with calm detachment. He had been here before.

"Marsha," he began, "for me, the two are one and the same. So your unanswered question is a perfect transition."

Marsha was a little startled by the crispness of Kevin's response. Kevin seized the moment.

“Do you remember during our initial interview,” Kevin said, “when I told you that I believe a sales process is valuable if, and only if, a prospect or client can see value in using it?”

Marsha acknowledged his question by nodding. Kevin continued.

“I’d like to walk you through what I was referring to then by using MI and their eBusiness initiative as a point of reference.”

Kevin started just as he had with Mike by explaining, at a high level, the intent for using the *Dimensions of Success* framework. Marsha immediately accepted the premise that the degree of success for a business initiative or solution was based on the priorities of the company, the requirements of the initiative, and criteria used to measure the initiative and the resulting value.

Kevin then drilled into the REQUIREMENTS dimension. As he walked through “The Gap” visual, he asked Marsha to read the Assessment Questions and the responses provided by the members of MI’s leadership team. As she read the questions and responses, Marsha said, “The client answered these questions because they understood it to be in their best interests for keeping their initiative on the ‘Fast Path.’”

Kevin nodded and Marsha continued.

“Their responses to these questions dramatically enhance the information required to drive our sales process. And, because the prospect or client has answered the questions, the integrity of the information is far superior to the current information entered by sales reps based on suppositions or assumptions.”

Marsha leaned forward slightly, reflecting on what Kevin had said, trying to make sure she understood it clearly.

“So, if I have this right,” she said, “‘The Gap’ visual creates natural urgency for all parties involved. And the Assessment Questions assist in qualifying the opportunity and determining if the prospect/customer as well as ISAP should engage or disengage with the opportunity.”

“Bingo,” Kevin said without skipping a beat. Then he drilled into the PRIORITIES dimension. As before, he explained the intent behind the Alignment of Priorities visual while Marsha looked at the Alignment of Priorities specific to MI’s eBusiness initiative.

Again, Marsha wanted to make sure she understood what Kevin was talking about. “So the Alignment of Priorities visual allows us to walk in and demonstrate that we have earnestly attempted to understand their business. And because we lead with a straw man visual that is 80% complete, we avoid asking a lot of open-ended questions which implies we do not understand their business. But, instead, ask purposeful questions to collaboratively make the straw man visual 100% complete.”

“That’s exactly the point!!”

Smiling now, Kevin focused on the CRITERIA dimension. He explained the intent behind the Value Proposition while Marsha reviewed the Value Proposition visual specific to MI’s eBusiness initiative. True to form, Marsha repeated what he had said in her own words.

“If I understand this, the Value Proposition allows us to concurrently express the value of a potential business initiative or solution in the different languages spoken by the different stakeholders within a company.”

“You got it,” Kevin said. Then he pulled out the Integrated Capabilities statement and handed it to Marsha. Kevin paused as Marsha scanned the visual, but before he could explain what it meant, Marsha spoke up.

“Let me guess,” she said. “This is how we position our integrated capabilities within the context of what our prospects or customers are trying to get done based on their PRIORITIES, REQUIREMENTS, and CRITERIA.”

“You took the words right out of my mouth,” Kevin said.

“I want you to take a look at something,” Marsha said, getting up from her chair and crossing behind her desk. She opened a drawer, took out a copy of ISAP’s current sales process, and handed it to Kevin. “It is very obvious that what you have just taken me through can be easily integrated into what we are already doing.”

Kevin, already familiar with the document, nodded with enthusiasm.

“Absolutely,” he said. “I would suggest that what you have done is built a great running shoe for a sales professional’s left foot. What I just walked you through is the framework and supporting tools that provide a great running shoe for the right foot. Together, you have a pair of shoes that provide a competitive advantage in the race to serve and sell prospects and customers.”

Marsha sat back and looked out on the garden for a couple of moments. Then she turned back and made eye contact with Kevin. “The unanswered question is now answered,” she said. “You clearly know how to serve to sell. On top of that, you have introduced me to a framework with supporting tools that will allow us to provide a great pair of running shoes for everyone within ISAP to win by serving their prospects and clients!”

Epilogue

In the spirit of a “not-so” fictional story, the “Phase 0” leadership meeting did in fact go very well. The leadership team agreed to Mike, John, and Sue’s recommendation of how best to proceed. Their approach - providing an 80% complete straw man with the intent of engaging the leadership team in a collaborative effort to provide the other 20% - resulted in a 100% commitment to proceed with MI’s “Seize the Moment” eBusiness initiative.

At present, the initiative is alive and MI is realizing more monetary value than they expected based on the criteria they had established. Mike, as a result of his contribution, received a significant promotion and ultimately transferred into Sue Jacobs’ Sales and Marketing group. Oh yes, perhaps I should also mention that Mike and Brenda are happily married and are now expecting their first child.

Finally, MI procured a significant amount of infrastructure products and services from ISAP, which meant that Kevin far exceeded his quota assignment and, as a result, received a *Superior Achievement* award from Marsha Lambert.

Going Forward

This “not-so” fictional novel is based on real companies and individuals. The names have been changed for all the obvious reasons. Each of the characters, like most of us, has their own individual interests, both personal and professional. Also, like most of us within a business setting, they must work with others to ensure that their interests along with the interests of others are met. Unfortunately, in the business world, we often lack the time and tools required to explicitly understand our interests yet alone the interests of others. Even worse, we almost always lack the time and tools required to ensure that our individual interests and the collective interests of others are met.

This book is intended to offer a way out of this dilemma. It is a book for buyers and sellers, which is to say that it is a book for all of us. Regardless of our official titles, all of us are responsible for both buying and selling ideas among individuals within our “circles of influence.” I think of a “circle of influence” as the group of individuals responsible for the early-on and ongoing success of a business initiative or solution. And one key to the individual and collective success of those within a “circle of influence” is collaboration, which I define simply as the “actions of working together.”

How well we collaborate within our “circles of influence” determines the degree of success we realize. Today, industry luminaries and periodicals are buzzing about the need for collaboration. Some would even suggest it is the next and possibly last frontier for businesses to create a durable, competitive advantage. The current hype for collaboration, however, is being exasperated by the aggressive push of vendors and consultants who claim to provide collaborative infrastructure offerings and services. In addition, the convergence of eBusiness with customer relationship management (CRM) has been one of the most overwhelming technology assaults in history. In spite of so many viable infrastructure alternatives, there continues to be little evidence of the collaborative promise in practice.

So why is the practice of collaboration struggling? One simple phrase captures the magnitude of the challenge at hand: *Caveat Emptor* - Let the buyer beware. Until buyers and sellers of ideas within “circles of influence” have the frameworks and supporting tools in place to facilitate collaborative relationships, the practice of true collaborative outcomes will be dwarfed by its promise.

Now the initiative highlighted within this “not-so” fictional story was one of convenience. Many individuals, including possibly you, are currently a part of a “circle of influence” responsible for capitalizing on the potential value of a collaborative eBusiness initiative promising to better serve prospects and customers. Others, including possibly you, are far removed from the eBusiness world. Regardless of the specific nature of a business initiative or solution, there is a “circle of influence” comprised of individuals that surrounds it. Based on your past or present involvement within *any* “circle of influence,” you hopefully empathized with many of the characters in the story. Some,

perhaps, you did not empathize with. Where this was so, it was the intent that you experienced the world through their eyes, and thus gained some additional insights that will prove useful within your own circle.

To the extent that each of us is a part of multiple “circles of influence” at any given time, then the potential payoff of creating a collaborative culture is truly awesome. It was the intent of this book to highlight both the obvious and subtle situations where the buying and selling of ideas within a “circle of influence” has an impact on business outcomes. Hopefully, you were able to compare and contrast your own situations with the situation presented in this book, and in so doing, assess the value of potential outcomes based on using or not using a framework and set of supporting tools designed to facilitate collaboration among individuals.

So where do we go from here?

First, regardless of our roles, each of us is constantly buying and selling ideas as we interact with others within our “circles of influence.” As time becomes scarcer, there is an ever-increasing requirement to improve the quality of interactions. The critical need for frameworks and supporting tools to facilitate collaborative interactions among individuals within and across companies represents a great opportunity. Very simply, those individuals and companies who act now will enjoy substantial “first-mover” advantages over their competitors, and will quite possibly enjoy long-term advantages as well.

Second, there is the current reality of the “promise vs. practice” of collaboration. While everyone is talking about the promise (1-2-10) of collaboration, there is little evidence of it in practice (1 through 10). There are no “silver bullets!” You must carefully and methodically evaluate the collaborative frameworks and supporting tools you will adopt and use. Like the foundation of a house, the decisions you make now will enable or hinder your ability to efficiently and effectively collaborate in the future.

Third, there is the challenge of moving from “promise to practice” with regards to your personal use of the *Dimensions of Success* framework and supporting tools. If this book has been successful, you are logically and emotionally inspired to begin applying the *Dimensions of Success* framework and supporting tools in your day-to-day activities. As with anything new, do not expect instant success. You will most likely feel awkward using this framework and supporting tools for the first time. You may still feel slightly awkward even after using the framework and tools a dozen times. But keep in mind that you only gain mastery of a tool by using it over and over and over again. Your perseverance through the initial learning curve will absolutely prove profitable both personally and professionally.

The Next Steps...

NOW it is time to begin putting your plan in place to use the *Dimensions of Success* framework and supporting tools with those individuals within your “circles of influence.” Based on literally thousands of experiences I have had introducing these tools to others, this will prove to be far easier than you currently realize.

Please give your “personal copy” or provide a copy of this book to those within your “circle of influence” who are responsible for contributing to the early-on and ongoing success of a business initiative or solution.

By letting this book and its contents serve as a catalyst, you and the others within your “circles of influence” will be very pleased with the collaborative outcomes and business results you achieve.

Seize the Moment!

About Knowledge-Advantage...

We hope that your first pass through this book proved both entertaining and valuable.

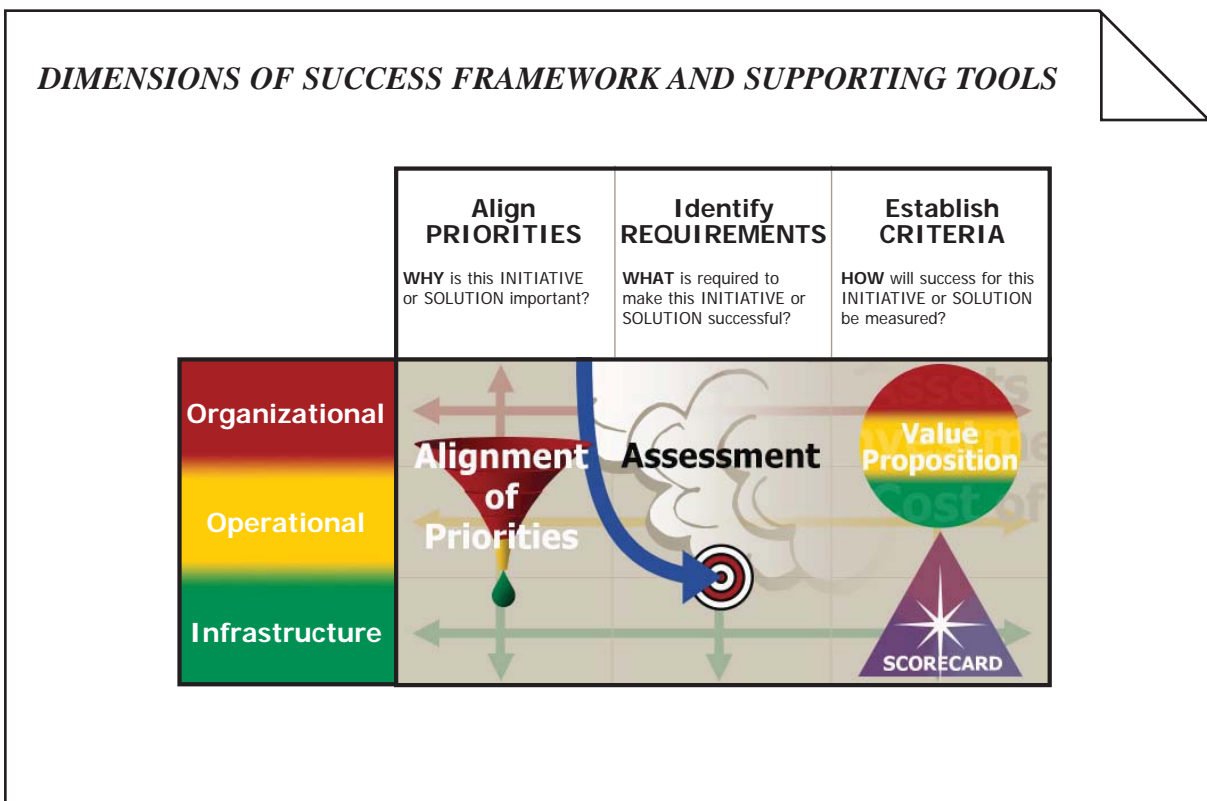
If this has proven to be the case, subsequent passes will only help to accelerate your ability to bring the *Dimensions of Success* framework and supporting tools to life.

We would truly value your thoughts (The Good, The Bad, The Missing) as you reflect on its contents and start putting the *Dimensions of Success* framework and supporting tools to work within your "circles of influence."

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