

Collaborate for Growth: Deepening Involvement through Hope

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Abstract

A global leader in information technology services, hardware, and software needed to transform its leadership development approach to address cross-business unit challenges. A consulting framework emphasizing hope, relationship, and purpose was developed and used with success. Results included a breakdown of barriers between leaders, improved innovation, and higher levels of trust in the organization. Specific lessons learned are also discussed.

Collaborate for Growth: Deepening Involvement through Hope

This paper presents a description of an experience with a leadership development approach to transformational change at IBM and provides the reader with a reflection on the lessons learned about essential experiences that enabled success in this particular effort. This paper describes the powerful and sometimes elusive opportunities to generate momentum and the will for change through a focus on hope and dialogue to create lasting change.

The internal leadership development and organization development consulting practice at IBM, Global Executive & Organization Capability (GEOC), created an approach to leadership and organizational development that provided our senior executives with a platform to achieve multiple levels of organizational change. At

its core, this approach was designed to develop the leadership behaviors and organizational alignment required to collaborate effectively across geographies, product lines, and functions to meet client needs and capture growth.

Our experience revealed that small additions to typical change leadership approaches resulted in enduring change. A group of organization and leadership development consultants agreed to make small shifts in how we engaged our executives by including explicit and implicit activities that nurtured hope, defined compelling purpose, and developed meaningful relationships. It did not require a lot of additional time to emphasize hope, purpose, and relationships when compared to the amount of consulting activity needed to analyze the complex business challenge we were addressing. The intentional introduction of hope was the stimulus for a shift in attitude that allowed more possibilities to be considered and embraced. This paper introduces the need for change, the consulting approach, the catalysts for change, and our lessons learned.

Collaborate for Growth

IBM's GEOC has a small cadre of consultants with a track record of developing high quality relationships with our business unit leaders. The group provides these leaders with a wide range of organizational development approaches to help strengthen their own leadership,

improve the functioning of their leadership teams, and increase organization effectiveness. In 2004, IBM redefined the type of leadership required for the company's next strategic era and launched a new set of leadership competencies. In the highly complex world of information technology (IT), where the breadth of IBM's portfolio can provide unmatched value to clients, people from multiple parts of the enterprise often must come together to address a client's need. In this environment, where horizontal and vertical networks of people are required to collaborate to bring value to our clients, executives must lead others who do not report to them and create the belief that together they can make changes for the better. For example, one of the leadership competencies is called collaborative influence, the ability to create interdependence and build a genuine commitment across organizational boundaries to a common purpose. In the highly complex IT world, where multiple groups may need to unite to solve a client's problems, neither siloed thinking nor command-and-control leadership would be sufficient.

As we developed the consulting strategy for 2005, we were faced with the daunting task of reaching our primary internal clients, the top 300 executives. We reviewed the business opportunities facing these executive leaders and decided we could be most helpful by providing consulting approaches to improve cross-business unit collaboration that would enact the new leadership competencies. We developed a platform for change, called Collaborate for Growth (CfG), that combined a number of organization development approaches to work at the individual, team, and organization level to enable business growth.

All who were invited to participate in the CfG engagement had varying degrees of knowledge about the case for change. While it can be argued that each person had their own interpretation about the contributing factors, all agreed that we were "leaving money on the table" and needed to find a better way to share information and insight, and collaborate in order to bring value to our clients. Through the selection process, capable and successful leaders were asked to participate.

How the Program Works

Because of the defined business need, the primary design principle of this platform for change is to improve cross-business unit collaboration and build the leadership capabilities as defined by the new competencies. CfG is a highly customizable framework for change that helps IBM executives create the needed organization changes and strengthens their leadership capability. At its core, CfG pivots on the learning that occurs as teams and individuals solve a systemic business challenge or opportunity. The executives involved in a CfG engagement work on a shared goal, identify systemic issues, and experiment with organizational changes. In the process, they learn how to work more effectively together and improve their ability to deliver value to our clients.

Executives at multiple levels in the business are involved to create a variety of perspectives about a significant business challenge that is getting in the way of growth. The sponsors are the most senior, typically with worldwide or geographic responsibility and the authority to sanction significant change. These sponsors select the

business challenge and focus for the engagement. The next level, called the Guiding Coalition, is a group of executives responsible to work as an integrated team, assess the challenge, and direct the overall effort. The third level, the Execution Teams, consist of three to four teams at the local point of execution. The intention of engaging all three levels is to create a microcosm of the organizational system, focused on a shared growth opportunity, and work together to create a systemic understanding about its shared challenges. These three levels also coordinate approaches to solve the challenges, and build a groundswell for whole-system change.

We conceived a triangle that symbolized the catalysts we believed would help the three levels achieve breakthroughs in cross-business unit collaboration (see Figure 1). The triangle featured hope, relationships, and purpose at each corner:

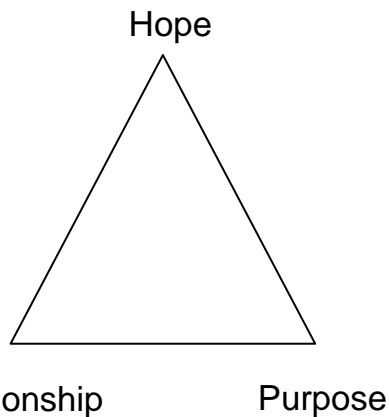


Figure 1.

Hope is the desire or expectation of a good outcome (Boyatzis & McKee, 2005). We believe that an emphasis on hope stimulates the executives to think about the possibilities and look ahead in a way that generates excitement for the engagement. Our

intention is to create a shared focal point for the effort that is realistically hopeful. Relationships are the essential ingredient that enables us to achieve more than we could on our own. Healthy relationships provide us with feedback, emotional support, and encouragement. They help build a sense of confidence that sustains our effort when confronted by challenge. They make our purpose reachable (Boyatzis & McKee, 2005). The nature of the relationships within each level (i.e., Sponsors, Guiding Coalition and Execution Teams) and between each level were developed through a focus on dialogue, which fostered development of the camaraderie and connection that became a source of rejuvenation for those participating in the effort.

Purpose becomes the rallying cry that provides focus at times of change and controversy (Hackman, 2002; Katzenbach & Smith, 1999) and it helps people coalesce. Purpose at the individual level creates a sense of deep personal meaning, and at the collective level it unifies, engages, and inspires the team.

Building these elements into the design and delivery of CfG was intended to break through the cynicism we knew existed in the organization. The cynicism was the result, in part, of the multitude of change efforts launched from the brands, functions, geographies, and regions throughout the company. Although each individual change effort was a well-intentioned attempt to improve execution and business results, taken together they each demanded attention which created the impression everything was urgent and important. Many of the change efforts were not coordinated. We needed to experiment with powerful approaches to mobilize the executives across

an array of levels in the system to identify different ways of working.

In every CfG engagement we worked with the sponsors to select a business challenge, identify the members of the guiding coalition, and conduct interviews to create a view of the current state. The results of the interviews were analyzed by the guiding coalition and they selected the execution level teams. We organized a two-day retreat for the Guiding Coalition and three Execution Level teams to agree collectively on the experiments they would launch to drive greater business results.

In a typical CfG retreat, the time is split between each team working separately and with everyone working together as a large group. We start the retreat with an evening reception to allow people to get to know each other. When working at the team level, we allot time for each team to consider and agree on the compelling purpose that framed their work together for this effort. In a typical consulting situation we would start the meeting with a discussion about team purpose, however in the CfG format we chose to engage the team with a discussion about hopefulness.

We start the session with a brief definition of hope and a set of ideas about the topic of hope and the dangers of hopelessness. Initially skepticism is evident. We often saw raised eyebrows, while others turned to their colleagues and made side jokes. Once the group settles down, we ask people to reflect on an early experience of feeling hopeful. We suggest they avoid work examples and instead pick an experience that occurred earlier than their professional life, something that is memorable. The intention is to tap into the emotional

experience, what it felt like to be hopeful. Then we ask people to gather in dyads and share the experience with a colleague with whom they don't normally work.

The room typically begins to buzz as the stories are being told and all members of the team become fully engaged. After each person shares their story with a partner, we ask for a few examples to be shared with the entire team. The examples often reveal simple moments and we ask them to describe how it felt to be in those moments. One executive talked about when he first met his wife-to-be and how it motivated him to improve how he took care of himself, so much so that he lost a significant amount of weight during their courtship. Another executive told the story of an ice cream truck driving through his neighborhood on a hot summer day when he was a child and, after being repeatedly turned down, successfully arguing and negotiating with his parent for the money necessary to make a purchase. The underlying theme in people's stories, when simplified to their essence, was that each person was and is inherently powerful in that they each had stories of successfully working hard or fighting to get what they wanted. Based on this connection to their personal power, the executives were better able to adopt a positive posture of hopefulness. During the debrief we asked them to consider how hope is related to their experience at IBM. The discussion became robust as people shared their aspirations for the company and their teams.

The next step was to get more specific and relate hope to the particular business challenge upon which the group was focused. There were two significant insights from this discussion. The first was the recognition

that they had to instill hope in the engagement to avoid falling into the trap of “going through the motions” of the work. The second significant insight was the realization that what they had done thus far, both individually and collectively, was to discourage hope. One example was a discussion about how they had blamed other units or divisions for the shortfalls in business performance. Another example was the realization that the way they inspected the output of the Execution Level teams signaled distrust. This enabled the group to transition to a discussion about its unique purpose. They agreed to a compelling and consequential statement of purpose that reflected their hopes and aspirations for the effort, and the unique contribution they would make. These candid discussions were a noticeable shift in the way these executives related to each other.

What We Learned

After the first year of launching the CfG framework, we learned several key lessons about creating a groundswell for whole-system change. The first was to never underestimate the challenge involved in engaging a microcosm of the organization to orchestrate simultaneous change across multiple tiers. At the outset, the Guiding Coalition defined compelling business reasons to collaborate more effectively. However, it was difficult for them to hold a dual focus of near term performance expectations and new ways of working. The pressure to focus on quarterly results is immense inside a publicly traded company and IBM is no exception. Across the business people are rallied at all levels to focus on short term results and efforts that will deliver near term progress. One symptom we noticed was the shift in

discussions to debates about the virtues of one measurement against another because of the prevalent belief that people will only focus on what they are measured to do instead of what is in the best long term interest of the company. The imbalance between long term and short term results served to deflect substantive discussions about cross-organizational issues and created barriers to change.

We learned that working with three levels in the system simultaneously is an effective way to create a groundswell of support. The rate and pace of progress varied across all the levels and we were flexible in the consulting support we provided. We noticed progress within one team would inspire and motivate the others. One example occurred early in the engagement when the sponsors were impatient for signs of progress. When they reviewed the output from the Guiding Coalition they were reminded of the difficult challenge that was being addressed and pleased the Guiding Coalition was approaching the work in earnest. Another example occurred after a retreat during which the Guiding Coalition redefined the team. While this stalled the work they were doing, we moved our focus to the Execution Teams, helping them to make progress. Because we could move easily between the levels, we gained perspective and encouraged momentum. We nurtured hope to identify new ways of working and helped overcome the inertia that results when attention and focus shifts to short term needs.

We realized the executives had the knowledge and ability, but the more elusive dimension was the will to create change. As one executive explained to us, “Our favorite sport is complaining to each other about the changes needed in the company to make

things better...and here we are with an opportunity to do something yet people seem reluctant to stick their neck out and try something different.” We noticed it in the Execution Teams by the way they responded to the change in team membership on the Guiding Coalition. They waited for a directive from the Guiding Coalition instead of executing the plans they identified at the retreat. The small and powerful additions to the consulting intervention that facilitated the will for change were the dimensions of the triangle: a collective sense of hope, using dialogue to develop high quality relationships, and working in teams with a compelling purpose. Developing each of these elements throughout the engagement did not require a large amount of time nor were they difficult. What was required was conviction and skill on behalf of the consultant to frame the dialogue about these elements with the executives and stay the course even when self doubt about relevance and timing emerged.

For example, if a planned meeting was shortened, it was always tough to decide what portions of the agenda needed to be preserved and which could be sacrificed. Given the complexity of the business challenge, the executives needed time for discovery, analysis of the problem, decision making, defining the plan of action, and preparing for reviews with the Sponsors. Under this pressure, the consultant’s conviction and skill to engage in discussions of hope, relationships, and purpose served the team well. The example we described earlier in this paper about the two day retreat for the Guiding Coalition and the Execution Level teams illustrates that conviction. There was enormous pressure from the Sponsors and members of the Guiding Coalition to emerge from the retreat with

solutions. During the planning of the retreat some consultants questioned the utility of the hope exercise and advocated we jump into the work instead. The authors understood the concerns and still decided to experiment with the exercise.

The focus on hope, relationships, and compelling purpose was intended to improve the quality of dialogue. While these elements worked in concert, we believe the most powerful of the three was the explicit focus on hope. Asking the executives to reflect on a hopeful outlook then discuss that outlook in dyads was an effective way to engage the team in a shared inquiry. They reached a greater understanding of each other, relationships deepened, and they formed a shared experience grounded in hope and their own power. The dialogue about hope created a gentle shift and we noticed an open mindedness to a variety of perspectives and an appetite for discovery. Creating a collective aspirational view and understanding of each other became the glue that held the team together. Once this bond was created, it signaled a shift in behaviors and helped develop the spirit of collaboration.

Before the team retreat there were leadership changes for two key roles, the Sponsor and Guiding Coalition leader. The delays that resulted caused many executives to question the utility about continuing with the effort. Some contacted us directly to say the effort was not making progress and should be cancelled. During the retreat, the executives publicly communicated their energy and excitement about the opportunity ahead. At the close of the first day of the retreat, one of the Guiding Coalition executives shared his response to the output from the day.

Spontaneously, other executives from the Guiding Coalition joined him and shared their impressions and hopeful outlook for the overall effort. The cohesion amongst the team was reflected by the similarity of their unscripted messages. Following the retreat, the same executives that recommended canceling the effort said we were back on track.

What was most interesting and enduring about deploying this platform for organizational change was impact of the new ingredients we added and the accomplishments achieved from the effort overall. The executives we worked with were impacted. Their spontaneous testimony at the retreat had an enduring impact on the Execution Level teams. When the effort concluded, we conducted interviews to understand what worked well, the business impact, and to surface suggestions for improvement in the program. The interviews revealed that the retreat was a turning point for the overall effort and it impacted how the executives exercised leadership on a day to day basis. The experience challenged their notion of leadership and altered their self-image. One executive explained, “That was one of my most meaningful experiences at IBM. I haven’t felt this excitement about the company since my experience as a new hire in sales school. It reminded me that I can help our people overcome difficult challenges; I have a unique opportunity to engage and excite people about what is possible when we work together.” The executives changed as a result of this effort and they carried this experience into future challenges.

Once hope is stimulated at the individual level, the question becomes how to

orchestrate sustained hope at a systemic level. In the CfG process, individual expressions of hope were sustained and nurtured by the webs of relationships that were developed across this engagement. The executives were able to move beyond their predispositions of distrust towards each other and formed genuinely strong and trusting relationships that resulted in innovative and genuinely collaborative approaches to new ways of conducting business. They discovered for themselves, operating in a framework of possibility, what they could accomplish together. They also realized their hopes were not solitary wishes but rather when shared they came to believe they could have an impact.

Beyond the very significant leadership attitude and behavior shift, there were other more business-specific results of this CfG effort. The key outcome was the creation of integrated teams in target markets to capture growth opportunities. These teams had much better alignment of resources because of the increased levels of trust that now existed across multiple business units. Although it is premature to report direct business measures, and practically impossible to control for the variety of intervening variables that could impact results, the three pilot teams set three-year growth goals of 20 to 40% and seem on track to reach those goals.

Conclusion

In some ways the consulting engagements using the CfG method are quite typical. As consultants, we focus on sponsor commitment, a clear business case that is understood and agreed to by multiple constituencies, realistic expectations of success reflected in a realistic scope, and

defining clear roles and responsibilities of all involved. As consultants, we have battle scars that remind us to be on guard and aware of these needs when working on complex change projects.

Ironically, the notion of nurturing hope explicitly seemed like a “nice to have.” It seemed helpful but not a necessary condition. When the notion of hope was worked explicitly with the executives, the result was much more profound and visceral. They were a smart group of people trying to solve a logical business challenge. When we chose to give space for a conversation and reflection about hopefulness there was a noticeable shift in the immediate level of engagement of the executives, they seemed relieved and easily engaged to speak about their personal hopes. These were not typical questions we were raising and yet the questions seemed immediately refreshing to the executives as they reflected and shared with each other. The benefits of these conversations and level of engagement served this effort well. The executives engaged with each other in ways that sustained and survived the day to day, quarter to quarter pressures, and competitive environment within which they operate. The stimulation and cultivation of hope helped each individual and team engage on a more intimate level with the business challenge. They demonstrated a sense of ownership and personal responsibility to stay with the difficult challenges.

References

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Authors' Reflection

Global Executive & Organization Capability provides succession planning, executive development and coaching, and organizational improvement consulting for IBM globally. This department reports to the Vice President of Talent for IBM, who in turn reports to the Senior Vice President of HR. During the Collaborate for Growth project described in this paper, Kristin was the lead consultant and Mike provided overall engagement support.

The Collaborate for Growth project lasted approximately eighteen months and during that time we were faced with an array of challenges, including leadership changes to the senior sponsor of the effort, cultural differences between the sales and product divisions, sustaining momentum over a long timeline, and maintaining the morale of our own consulting team. In the face of so many challenges, we chose to focus extra energy on the momentum challenges. While continuing to work at all three levels simultaneously, we diverted some attention to the client facing teams in the field to identify the local enablers of collaboration.

Through our persistence we were able to support the client facing teams as they identified new ways of working and made their efforts known to the senior most leaders. In that way, our being internal consultants was a powerful asset. We had

the staying power and could afford to be patient while tangible results were being produced. We also had the access to senior management and could float across all levels of the system.

Because we were internal, we did not have to negotiate a contract or signed statement of work with the sponsoring executives. We believe the lack of a written agreement, however, weakened the standing of the effort during the leadership changes. Our advice is to be explicit with your clients about your agreements and keep revitalizing that agreement during long-term efforts.

Authors' Bios

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