



●●●●● Leading through an Involuntary Transformation ●●●●●

Using the
Strategic Organizational Renewal (SOaR)
Playbook

www.endeavormgmt-institute.com

INTRODUCTIONS

DR. GREG POOL



Executive Director – Endeavor Institute

Chair - Industrial/Organizational Psychology Department
St. Mary's University

Innovative researcher, insightful consultant, and dynamic educator.

Identifies the scientific mechanisms behind influence, power, leadership, and organizational culture.

Applies science-based interventions to address organizational transformation and success.

Creates custom measures and metrics to provide insight.

BARBARA STEWART



Director, Organizational Performance

Designs custom development programs for intact and distributed teams

Measures results through engagement surveys, team analysis and assessments

Delivers one-to-one Executive Coaching, team workshops, retreats, and leadership development programs

Dynamic speaker who raises awareness, emphasizes outcomes and inspires action

Advisor to C-Suite executives and Board Directors

BACKGROUND ON OUR FRAMEWORK

- Thought Leaders in Transformation for over 30 years
- Published 3 books
- Recognized by Harvard Management Review
- Wharton adopted our online library as part of theirs
- > 100k artifacts in our knowledge library
- Member of Dr. Hammer's Phoenix Team
- Applied at numerous Fortune 1000 Company's



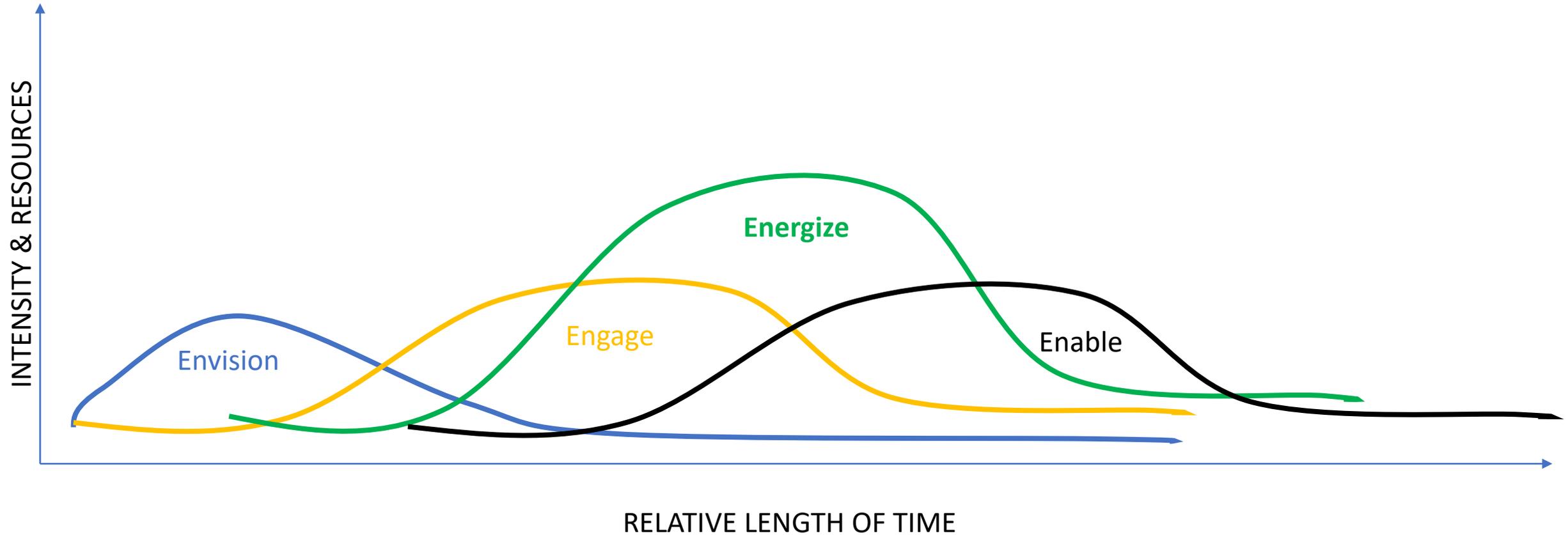
THE *INVOLUNTARY* TRANSFORMATION

Leading an organization through a transformation uses a common framework, the art is in configuring the best practices to fit the circumstances



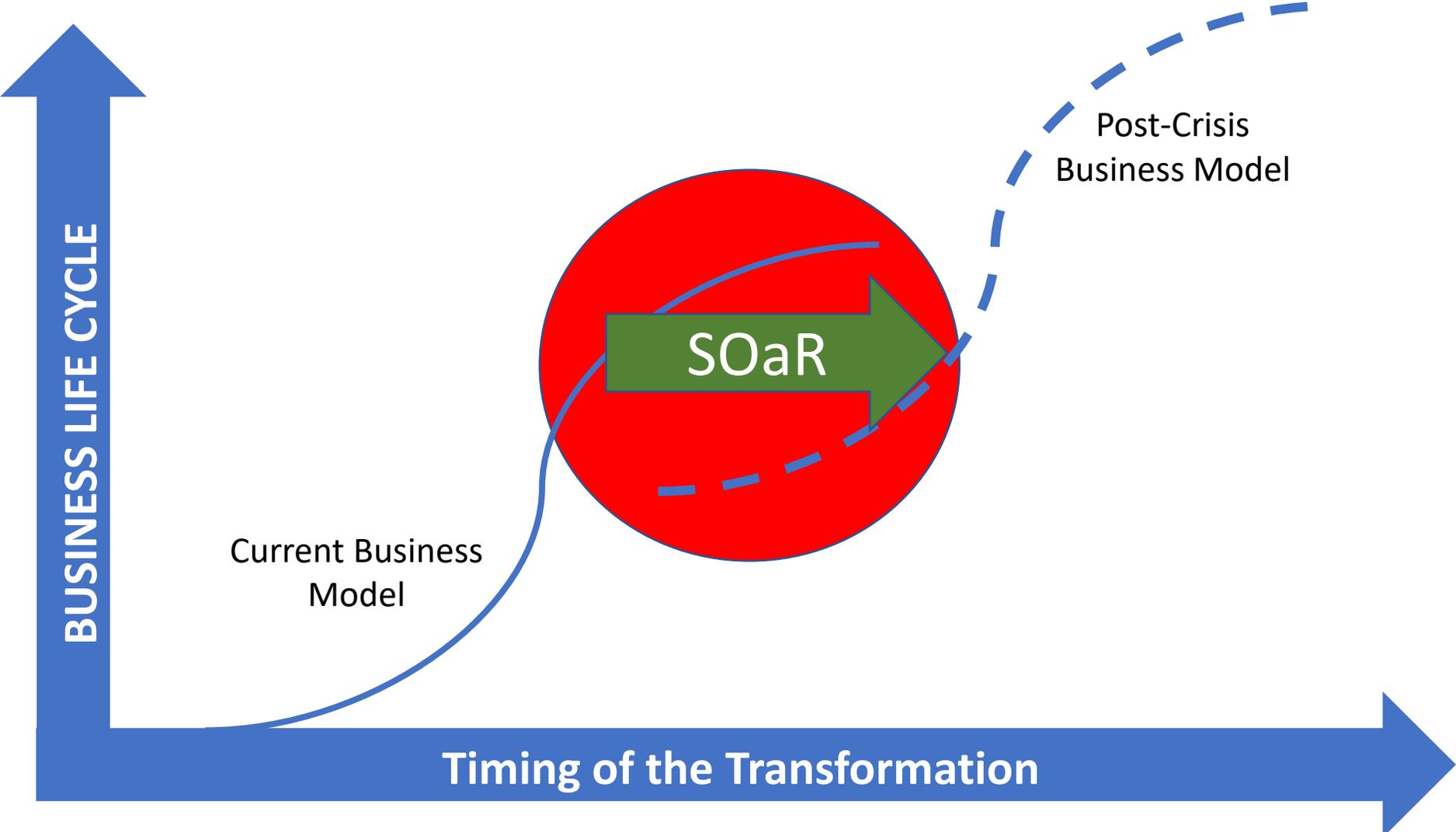
Strategic Imperative	Transformation Playbook
Changing your competitive strategy	Strategic Growth Playbook
Implementing a major merger or acquisition	M&A Value Realization Playbook
Redesign of your core business model	Enterprise Re-engineering Playbook
Implementing an enterprise wide technology	Technology Implementation Playbook
Recovering from a major economic disruption	Strategic Organizational Renewal (SOaR) Playbook
Realigning your culture	Cultural Change Playbook

ALL ELEMENTS ARE BEING WORKED IN A CONCURRENT, BUT LOGICAL SEQUENCE



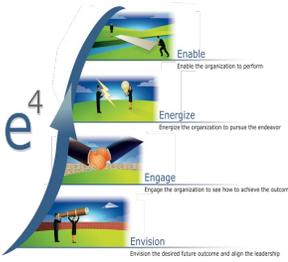
EVERY TRANSFORMATION HAS A RED ZONE

The RED ZONE is the gap between where you are and where you wish to go: Opportunity or Danger?



THE SOaR PLAYBOOK - TOP 20 PLAYS

The central theme of SOaR is around engaging and reconnecting to employees, customers and partners by meeting both functional and **emotional** needs



ENVISION

Envision the Future & Align Leadership

- Appoint a “Specialty Team” to plan and lead the renewal efforts
- Set up a governance process specifically for executing the plan (RTB/CTB)
- Define the priority of business model and **organizational changes**
- Update your financial & risk management strategy (prep for a possible “second wave”)
- **Build a multi-channel communication plan for employees**, customers, suppliers, & other key stakeholders

ENGAGE

Engage others to see how to get there

- Define the process for restarting disrupted or postponed activities
- Re-engage with customers, supply chain, vendors, and partners
- Develop a business acceleration & optimization strategy/model
- **Reset employee and customer expectations, experience and marketing strategies**
- Implement digital assets to optimize operational effectiveness & resilience

ENERGIZE

Energize the workforce to take us there

- **Prepare to deal with an “Ocean of Emotion” – both visible and hidden which will affect behavior**
- **Redefine Quality of Life expectations and policies**
- **Assess team member talents and capabilities and align talent with critical needs, supplement with outside resources**
- **Restructure and/or rebuild teams**
- **Educate leadership on how to be good cultural stewards during uncertain times**

ENABLE

Enable the organization to stay there

- **Optimize organizational structure for resilience & agility**
- **Alter HR policies and benefit plans to support desired behaviors and expectations for the future**
- **Identify aspects of culture that helped and hurt in the “survival” phase**
- **Develop a cultural alignment plan of action for each leader**
- Develop a crisis response plan of action, resourcing plan and train leadership in their roles (Be prepared for the next unexpected event)

RESOURCES

www.endeavor-institute.com/involuntarytransformation

Educational

- Change is the Rule (Book)
- Red Zone Management (Book)
- Transformational Change Communications (Toolkit)
- Run-the-Business / Change-the-Business (Whitepaper)
- Customer Experience
- Psychology of Stress
- Analytical Modeling

Developmental Programs

- Transformational Leadership (Certification Course)
- Leadership Alignment & Team Building
- Transformational Change Communications Training
- Run-the-Business / Change-the-Business Training
- Expert Speaker Series (In-house)

Advisory Services

- “Hotlines” (Free for attendees)
 - Transformational Architect : 281-433-3277 (Bill Nash Founder)
 - Org Behavioral Psychology : 817-528-1947 (Dr. Greg Pool)
 - Strategic Workforce Management 972-983-7065 (Rod Austin)
 - HR Policies 210-495-1171 (Corey Hookstra)
- Peer Group Roundtables (Subscription)
 - 10 Members (Organizational Leaders)
 - 1 Leadership Expert & Moderator (e.g. Barbara Stewart)
 - 1 Graduate Student for Peer Group support
 - Dedicated Peer Group Teams Site for knowledge sharing
- Research
 - Selected topics identified by multiple members, syndicated cost
 - Customer Research
- Best Practice Assessments/Reviews – Independent verification & feedback



Endeavor THANK YOU

We look forward to working with you

Contact



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