

McCreightPartners Insights - Chapter 4 Planning and Resilience



Lessons Learned from Implementing a Three Billion Dollar Strategic Initiative

To contrast his success with others who experienced more life-and-death experiences at the Earth's poles, Roald Amundsen noted: **“Adventure is just bad planning.”** Mike Tyson offered another valuable observation, “Everyone has a plan until they get punched in the mouth.”

Based on the above, you've likely realized this is a **tale of trust, planning, and teamwork to withstand “punches” along the way.** One client was faced with multiple challenges that were all manifest in an initiative to merge and reorient over ten legacy entities by moving the majority of thousands of professionals from disparate locations and operations into one, and eventually two, purpose-built new facilities that minimized siloed behavior. This undertaking was launched when the organization itself was facing its greatest competitive challenges, and was required to reinvent what they did, how they did it, and who would get it done.

We partnered with the executives in charge of ensuring the facility enabled the transformation, from design through build, move, and operation. Our approach, partnering with talented client-partners, as with so many strategic initiatives, sounds simple but required effort, insight, and expertise to implement. **We progressed**

through planning, managing change, and grappling with obstacles as the client completed its strategic transformation ahead of time and below budget.

PLANNING



Planning was key and comprehensive. Partnering with our client's leaders, we collectively identified the expertise required to be successful – from traffic management through facility design and forecasting impacts to the workforce. Some expertise was provided by the client, some was added by vendors (architects, designers), and many professional roles were filled by members of our global network of Alliance Partners.

With expertise in place, we conducted rigorous, iterative reviews to generate a plan.

The plan was articulated in a single, cohesive deck that included breakout milestones for each function, all in the context of an overarching timeline. Planning ranged widely, from anticipating hundreds of professionals who might opt out of the relocated organization to how to transition from siloed operations to create a unified culture.

MANAGING CHANGE

With plans in place and designs and preparations in process, we sought methods to ensure resilience against obstacles to success. To maintain a cadence that focused on delivery while engaging cross-functional talent, we worked with our client's leaders to create a weekly commitment to pause and collaborate on progress. At the same time and place each week, leads and SMEs from each segment of the initiative presented their progress and challenges to the group. Each week, leaders were accountable for making progress. We found this



cadence invaluable, as everyone pulled together to help make sure the transformation kept pace.

One of the most demanding challenges during the weekly reviews was to encourage proud professionals to admit their initiatives were “red.” In time, everyone realized the acceptance of “red” status fueled teamwork essential for success.

OVERCOMING OBSTACLES

As Mike Tyson succinctly predicted – the “punches” arrived. During the course of the initiative, the team had to adjust to many impactful changes.

- **The expectations for the facility changed, as an additional team with heavy communications and computing needs were chosen to occupy the site, requiring changes to how energy was sourced and managed**
- **The roles of the people involved changed, requiring different computing tools, but more importantly vastly different collaborative spaces, causing the team to need to adapt midstream**
- **Vendors, budgets, and timelines all took unexpected hits along the way**



Because the team had planned rigorously, team members trusted and respected each other, had sourced deep expertise, and used a management process that quickly uncovered and adjusted to change, **each impact was absorbed and mitigated, resulting in success.** Because the planning and implementation structures were resilient, despite instances of turmoil and change, those outside the initiative perceived a smooth road to a serious and sustainable transformation to a more effective culture.

We enjoyed contributing to this effort. The lessons regarding applying planning, deep expertise, and a management cadence to achieve success continue to resonate as we implement strategic change. If you're considering an important initiative, we may be the right partner to help ensure a successful outcome. Call or email to have an exploratory conversation.

valued clients and our Alliance Partner network, as a crucial enterprise managed a significant transformation. We are grateful as well for the lessons we learned, which we continue to apply with our clients.

Author, Alliance Partner Jeff Smith



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To share our lessons learned and encourage collaboration, we publish our perspectives in chapters of McCreightPartners *Insights*.

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