



Getting DEI Right – Two Phases, Two Key Questions, & a Dangerous Pitfall

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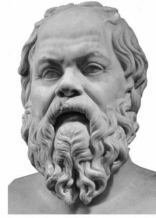
Introduction

Getting the Desired Outcomes - Avoiding the Path to Mediocrity

It is very easy to end up pursuing mediocrity in Diversity, Equity, and Inclusion initiatives. That is because they are tough complex challenges. To avoid the pursuit of mediocrity requires leading DEI initiatives in at least two distinct phases – each with their own challenges and leadership requirements. If a leadership pivot from one phase to the next is not made, the path is to mediocrity – at best.

- **Leading Phase I – Commit, Design, and Launch.** In Phase I to avoid the path to mediocrity the C-Suite must answer two key questions and avoid one dangerous pitfall. The C-Suite must correctly answer the deceptively important questions, “Why are we doing this?” and “How are we going to do this?” The C-Suite must also avoid the dangerous pitfall of delegating too much responsibility too quickly – abdicating leadership.
- **Leading Phase II – Persevere and “Drive it Home.”** In Phase II the C-Suite must pivot to find the leverage to “drive it home” and actually achieve the desired outcomes, particularly the tougher business operations outcomes. This involves a shift in who leads, how they lead and the discipline to focus on where the leverage is in the organization to successfully complete the journey.

MEH... GOOD ENOUGH



-MEDIOCRATES

Why Two Leadership Phases?

There are a surprising number of reasons to make a significant disciplined leadership pivot from Phase I to Phase II of a DEI initiative. This is not an “either/or” issue and neither phase takes precedence over the other. It is a “both/and” issue and each phase has its own opportunities, requirements, and limitations. The phases are complementary and Phase II builds on Phase I.

- 1. There Must be a Conscious Disciplined Leadership Pivot.** Phase I can last several years, but at some point leadership needs to pivot in several key ways. It must pivot from a strategic organization-wide focus to more of a targeted operational focus. It must also target high leverage opportunities, from processes and units to particularly well-led areas where activity can have the greatest impact. And it must deepen achieved benefits while focusing on the more business-oriented outcomes that are harder to achieve.

**Move
the Needle!**

- 2. The Needles Will Simply Not Move a Lot in Phase I (naturally).**
The needles for some goals will move, but Phase I usually does not generate the hoped for return on the investment – it rarely fully matches hopes and expectations. The leadership challenge is to understand this, celebrate progress and manage people’s expectations, and build on the progress in Phase I to jumpstart Phase II and keep moving the needles.
- 3. It’s Tough to Generate the Operational Business Benefits in Phase I**
Most of the benefits in Phase I will be HR related and those will result from awareness and education work as well as initial changes in the “things” of the organization, such as strategies, policies, processes, technologies, etc. Few sustainable operational business benefits will be fully achieved in Phase I and many of the HR benefits will be vulnerable and need to be deepened and

embedded. Operational performance and bottom-line changes take time and adaptive leadership as the journey progresses.

4. Leadership and DEI Credibility Take a Major Hit Without a Phase II Pivot

The natural limits of progress in Phase I can be a liability – draining energy, increasing cynicism, and diminishing leadership credibility in people’s minds – unless it is normalized. The confidence and motivation of those in the leadership web can naturally be diminished and it is hard to get that back. This can obviously transfer to a loss of credibility in general and affect operations as well as other initiatives.

This is a major reason why the two-phase approach is critical. Highlighting a second phase allows leadership to celebrate what was realistically accomplished in Phase I, acknowledge the natural limitations, and build on Phase I to pivot to Phase II and achieve what that focus of leadership makes possible.

5. The Points of Leverage for Leadership Naturally Change

This is deceptively important. There must be a pivot in terms of leadership focus as well as responsibility for leadership. This matches the changes in where the leverage for making a difference is in Phase I vs. Phase II. It’s a natural change as the journey unfolds.



In Phase I much of the leadership leverage is in organization-wide activities, particularly focused on engaging people in increasing awareness, education, and competencies as well improving certain key processes and systems. The focus of leadership is on the C-Suite, the DEI leadership team, DEI consultants, and selected senior leaders.

In Phase II the focus shifts to focusing on identifying the highest leverage points and matching leadership responsibility as well as strategies and tactics. Where are the greatest benefits, the strongest leaders, critical stuck points, etc.? The leverage points are closer to operations and best identified through a disciplined process of assessing the Phase I experience through a fast-cycle learning and response process. That process can generate energy and new commitment, as well as focus desired actions and reinforce leadership credibility.

6. The Locus of Leadership and Ownership for DEI Must Change

The focus of leadership needs to shift to match the focus on leverage in Phase II. That means that a much greater focus needs to be on leaders outside the executive suite – those leaders that lead the parts of the organization where the most opportunities for progress lie - leaders with direct impact on operations.

These are the “go to leaders”, the leaders close enough to the top to understand strategy and how organizations work as well as being close enough to the front lines to strongly impact operational performance.



Note. The shift in leadership focus does not mean that the executive level is less important. It must continue to “model the way”, remove systemic barriers, and assign resources. With the leadership pivot it must also oversee the performance of the broader leadership web – from its empowerment to its accountability.

7. The Good News – Basic Change Strategy Can be Consistent in Phase I and Phase II

The good news is that Phase II does not require a whole new set of change leadership roles and strategies. The importance of some of the roles and their core strategies will change and that needs to be done in a disciplined fashion, but the leadership pivot does not require a dramatic shift in roles or strategies. It does, however, require a careful revision as well as a close look at who will be executing the roles and strategies.

8. More Good News – Making the Shift Can Generate Energy, Commitment, Trust, Confidence, and Even a Sense of Community

There is a healthy 3-part process of accountability that can be used by the organization as a whole, by units, by project teams, or informal groups.

The first part is celebrating what has been accomplished – including completions, progress, and even worthy efforts that were not fully successful (protects risk-taking). The second part is identifying learnings of all kinds – from the nature of DEI initiatives and change to what worked or didn’t work (and lots of other topics). The third part is identifying what to keep doing, stop doing, or start doing (targeted next actions).

i.e. Celebrate, learn, and target actions. That combines powerfully with targeting the specific areas of focus of the initiative in Phase II as well as the web of leaders who will be leading the way.



COUNTERING RACISM

Leading Phase I - Excellence or Mediocrity Two Critical Questions & One Dangerous Pitfall

It is very easy to end up pursuing mediocrity in DEI initiatives. That is because they are tough complex challenges.

To avoid the pursuit of mediocrity requires answering two critical questions in Phase I and avoiding the dangerous pitfall in that phase.

- **Question #1 - Why engage in a DEI initiative?**
The foundation for genuine sustainable engagement and a deceptively important and challenging decision.
- **Question #2 - How do we lead the required changes?**
Change Leadership roles and strategies for successfully achieving the desired outcomes.
- **10 Critical Success Factors for Success in Phase I**
- **The Dangerous Pitfall for the C-Suite**
Abdicating Leadership - "Game Over"

Question #1 Why engage in a DEI initiative? The foundation for genuine sustainable engagement.

That sounds like a simple question to answer. It's not. The wrong answers for this question can make or break a DEI initiative. Getting the right answer requires disciplined thought by executive leadership.



Is it a “Have to” or a ROI Decision? Some business decisions are “have to” decisions. It feels like there is really no choice. For others it’s a question of return on investment (ROI). What’s worth the effort, risk, focus, resource allocation, lost opportunity cost, etc.”

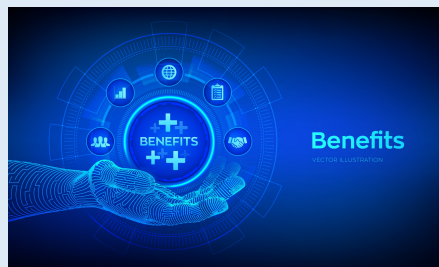
“Have to” Decisions

Far too many decisions about DEI initiatives appear to be “have to” or “should” decisions and that type of decision usually leads to major disappointment. That disappointment is the result of several factors that can combine to easily undermine the initiative – a decision without an authentic commitment, a focus on guilt and shame vs. responsibility and truly desired outcomes, a focus on programs vs. organization design and change, and a lack of healthy accountability and perseverance.

“Have to” decisions simply don’t have the inherent value that commands sufficient C-Suite engagement and attention. A “have to” decision can lead naturally to the abdication of authority and responsibility by senior executives and frequently to short-lived commitments or too early and too extensive delegation.

Return on Investment (ROI) Decisions

Successful DEI initiatives will only result from robust ROI decisions. The key is to develop a realistic and honest set of moral and business cases and a vision of how they might look and how they might benefit the organization. That requires disciplined leadership and a well thought out process.



A ROI that justifies a commitment to a DEI initiative rests on 3-4 cases – a moral case, an internal business case, and possibly an external business case. The combination of these cases establishes the value for why to conduct a DEI initiative. It also supports “holding the course” over time.

There is more detail on making powerful ROI decisions in the Addenda

Question #2
How do we lead the required changes?
Key strategies and a web of leaders

Leading DEI initiatives is a tough complex challenge. Changes will be on individual, group/team, and organizational levels. Those changes will also challenge people intellectually, emotionally, and socially.

Executive leadership must maintain the ultimate lead, but it must be complemented by an extended web of aligned leaders that can reach well into the organization to provide reach, flexibility, and credibility – the “leadership web.”



Fortunately, there are some critical success factors (CSFs) that can provide a great deal of guidance in aligning that leadership.

**10 Critical Success Factors (CSFs) for
Leadership in Phase I**

These are C-Suite strategies, but others will join the C-Suite in executing them appropriately at lower levels in the organization. These CSFs will require different levels of “hands-on” actions by the C-Suite in different organizations and at different times. The key is to ensure that they are executed effectively and that those exercising them have the authority and credibility to do so.

When the responsibility is delegated, it must be delegated with clear direction and obvious support. **Note.** Those to whom the CSFs are delegated must clearly be seen as agents of the C-Suite, competent to achieve them, and backed by the C-Suite.



1. **Answer the “Why?” Question.** This involves the combination of moral and business cases (the ROI) – why are we doing this – the possible good things if we do and the bad things if we don’t?
2. **Answer the “Where?” Question.** Create a clear and compelling “vision of the desired state” that is worth pursuing (speaking to the head and the heart). This can be combined with the required core strategies (the hands).
3. **Make a Powerful Leadership Commitment.** Be very clear about how leadership will lead the initiative – what people can expect to see and experience – and what they will not see and experience from leadership.
4. **Establish the Required Organization Architecture.** Identify the organization required to execute the strategies and achieve the vision. There will be individual and group change required, but there will also be systemic changes – from roles and relationships to policies, systems, and processes. It is critical to look at all the elements that go into the architecture of an organization to take advantage of the leverage that a large number of the elements will offer.
5. **Put Clear and Compelling Plans in Place.** These are plans that can provide direction, leadership credibility, and a basis for accountability. Plans will naturally evolve with experience as the reality of the journey unfolds. However, starting with excellent plans makes a big difference, largely through the value created in the process of creating them.
6. **Build the “Web of Leaders.”** *Leadership leverage stops where the leadership web stops.* Develop the extended and aligned leadership web required to execute the strategies. This starts with the C-Suite and extends well into the organization. This includes clear roles and healthy relationships – individually and in groups and teams. Maintaining the health of the web will be particularly important in Phase II.
7. **Prepare People for the Journey.** Lay out the journey and what to expect - and prepare people for it. This CSF is often overlooked – and that has consequences with a challenge like DEI. DEI initiatives present tough intellectual, emotional, and social challenges and people must be prepared for the challenges.
8. **Build the Competencies Required.** Focus on building the competencies required for success in the envisioned desired state – individual, group/team and systemic. Some of these competencies will be DEI specific and some will be

basic business and leadership competencies. Many of these competencies take time to develop, so this leadership challenge extends well into Phase II.

Note. This is a “building on strength” approach so the competencies are added to the competencies already in place – not “fixing” or a deficit approach. It is simply what elite organizations do.

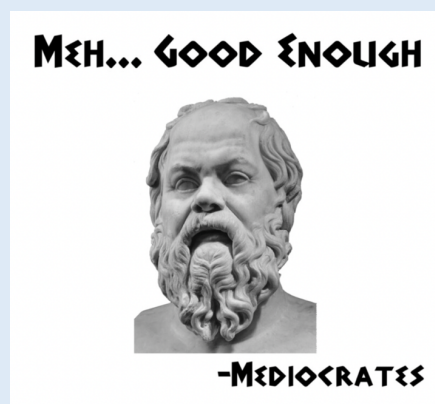
9. **Connect People Through Communication.** Ensure effective communications out (particularly in the beginning) and effective feedback loops (particularly as people implement the strategies). Effective feedback loops and quickly responding to close the loops are important in Phase I and become increasingly important in Phase II.
10. **Establish Healthy Accountability.** Institute a healthy process of accountability – using the formal performance system and frequent/informal accountability “check-ins” for fast-cycle learning and response.

We always “learn the way” in cases of major change, so accountability processes that support fast-cycle learning are critical, particularly in designing and executing Phase II. “Dynamic Accountability” is a powerful model for frequent informal accountability that maintains direction as well as generating energy. This is the 3-part process described earlier and described in more detail in the Addenda.

“There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success, than to take the lead in the introduction of a new order of things.”

Nicolo Machiavelli

OR



The Dangerous Pitfall for the C-Suite Abdicating Leadership - “Game Over”

For DEI initiatives, the common danger for C-Suites is delegating too much responsibility too fast. For DEI initiatives this is a very common danger, and it really does lead down the path to mediocrity. DEI initiatives are complex and emotionally charged. They require committed and sustained C-Suite leadership, including “modeling the way.”



DEI initiatives are simply too tough a challenge and operate on too many levels for the C-Suite to delegate too much responsibility too fast. DEI initiatives involve leadership at the individual, group, systemic, and cultural levels. Senior leadership must lead on all of those levels, particularly in the beginning.

DEI initiatives are a different challenge for C-Suites than the normal organizational challenges and require a surprising amount of courage and stretching by C-Suites to lead them effectively.

“In periods where there is no leadership society stands still.”
Harry S. Truman

Why the C-Suite Must Commit to Be Fully Present in the Lead Role

The C-Suite needs to be fully present in order to actively lead DEI efforts – a level of leadership that is required because DEI initiatives involve change at the cultural and systemic levels as well as the group and individual levels. And that leadership needs to be obvious and sustained in order to match the difficulty and complexity of the challenge. It is the foundation on which the extended leadership throughout the organization depends.

The C-Suite has perspective, leverage, and can inspire the confidence needed. The C-Suite is positioned to see the potential benefits and it has the power to effectively lead the efforts to achieve them – from aligning the Board and organization design to leading the journey and removing barriers. No one else in the organization has the leadership leverage required. Nor can anyone else have the same impact in “modeling the way” and calling forth people’s best.

“When the C-Suite wiggles, everyone else gets whiplash.”

Without active sustained leadership from the C-Suite, organizations are pursuing mediocrity. There are some rare exceptions, but those exceptions are extraordinarily rare.

When the C-Suite leads, a web of aligned leaders and followers can support that lead. Supporting roles and structures, need to be in place to support the C-Suite. Key players to naturally be engaged early are usually Chief Diversity Officers, Diversity Councils, direct reports, key natural leaders, and selected outside experts.

It's a "Warrior Challenge" for the C-Suite

There are lots of definitions of warriors' codes, but a simple and inclusive one that is appropriate here is that a warrior "engages fully and with purpose and excitement." This is the opposite of the approach where the C-Suite withdraws and sits back to see what others can make happen.

A warrior approach is a full commitment of character and competence that is not diminished by fears of the experience or potential poor outcomes. It requires the courage to "be all in" in the face of a journey that will be full of unknowns and daunting tests. Everyone will look to see if the C-Suite is all in.

"There are only two options regarding commitment: you're either in or you're out. There's no such thing as life in-between."

Pat Riley

It also requires an openness to learning – rapidly. Leading DEI initiatives is new ground. Very few people have been here before and there is a good deal to learn. Therefore, part of the challenge for C-Suites is to take the lead and model rapid deep learning about diversity in all its various forms – how it lives in the execs of the C-Suite, how it lives in the C-Suite as a group, how it lives in the organization, and how it lives in the community.

Remember. This learning is focused on a deep, complex, and emotionally charged topic. It is not the same as learning a skill or even a new role. It asks much more. At the same time, it is critical for the C-Suite to be aware of how much experience and competence its members bring to the challenge. This is a "building on strength" challenge.

"If you are entrusted with bringing about change, you likely possess the knowledge needed to advance the organization and you might have a plan – but knowledge is not enough. You have to bring yourself to each interaction in a deeply authentic way. People don't care how much you know until they know how much you care."

Doug Conant

"Modeling the Way"

No one in the organization will miss what the C-Suite models. The C-Suite is essentially saying, "As an organization we are going into the unknown and we as the C-Suite are

going first – with full commitment and confidence.” What others also hear – without it ever being said – is, “...and we expect you to follow us with full commitment.”

It’s simple. If the C-Suite is not modeling such a warrior approach, the organization will simply not take a warrior approach, the efforts will not match the challenge, and the results will be disappointing. The DEI challenge is simply that tough. The leadership role that the C-Suite takes is the foundation for the journey – the foundation on which everything else relies.

Modeling the wrong thing. One major problem with the C-Suite abdicating leadership is that it demonstrates for the whole organization that they are not the owners, do not have the confidence, and cannot be counted on to deal with an extremely tough challenge. Leaders exert a tremendous amount of power when they model behavior (no one misses it) and modeling stepping away is lost on no one – and it almost guarantees the pursuit of mediocrity for the organization.



COUNTERING RACISM

Leading PHASE II – The Leadership Pivot - “Drive it home”

Phase II is different than Phase I because the challenges change significantly as DEI initiatives roll out. Phase II builds on and complements Phase I. The stronger Phase I is in design and leadership, the stronger the foundation for Phase II. In fact, if Phase I is weak, then Phase II will need to include some re-work of Phase I in order to realize the possible benefits.

Comparing Phase I and Phase II Themes and Goals

Phase II Leadership Focus – 7 Critical Success Factors



Comparing Phase I and Phase II Themes and Goals

Phase I

Theme: Focus on DEI awareness and expertise, create the right design, and launch the initiative effectively.

This is the classic initial change leadership phase where the case is made for change, the vision is created, the organizational design elements are defined and plans for guiding the change are put in place. Executive leadership is the critical leadership level.

Phase I has a heavy focus on developing DEI awareness and expertise without which the required organizational changes cannot happen. Significant external expertise is almost always required to develop internal capabilities and achieve the potential Phase I outcomes. This is a new and extremely tough challenge and very few organizations are staffed internally to match the requirements.

Goal: “Engage people and move the needles.”

This is the phase where people are engaged and aligned on direction; individual, group, and organizational knowledge and capabilities are initially built; momentum is created; and initial outcomes are achieved.

Phase II

Theme: “Hold the course and drive it home.”

Phase I will have set the direction along with the core strategies and tactics. It will also have engaged people and generated the initial energy. Phase II must assess where the organization is on the path and what leadership must do to ensure success as plans meet reality.

The focus of leadership will be on the “go to leaders” that can connect strategy and operations and lead targeted parts of the organization. The focus of change will be on carefully targeted parts of the organization (units, project teams, groups, etc.) that offer the greatest potential benefits, are led by the best leaders, or are choke points that need to be dealt with.

What is required and developed in Phase II is discipline and perseverance in leading a long tough journey of change. DEI expertise is still invaluable and required, but the focus on capability shifts to leading the required changes to fully embed the benefits achieved in Phase I and achieve the potential benefits of Phase II. Support for the leaders of change in Phase II becomes critical.

The pitfall to avoid in Phase II is failing to integrate the DEI and change leadership support. That is a danger in Phase I where change leadership can be undervalued and DEI is the primary focus (as it should be). It is a bigger danger in Phase II where DEI fatigue can set in, and people can disengage. Change leadership capability is central in Phase II, but DEI awareness and expertise needs to continue to develop.

Goal: “Maintain direction and energy and continue to move the needles.”

Phase I will realize some of the desired outcomes, but it can only “move the needles” so far. Phase II must focus on the leverage to continue to move the needles, with a likely focus on the business-oriented goals, such as innovation, market penetration, team-work, cross-boundary collaboration, etc. Phase II must also ensure that the benefits achieved in Phase I are fully embedded and sustainable.



Phase II Leadership Focus 8 Critical Success Factors (CSFs)

There is a pivot in leadership’s focus in Phase II that is critical for both achieving outcomes and conserving resources. There are seven key areas of focus for leadership and each area has a set of guiding questions to help determine the highest leverage leadership activities for Phase II.

These are CSFs for the C-Suite as well as the extended leadership web that is essential for Phase II success. The alignment from the C-Suite out to the identified “go to leaders” essential in leading change in Phase II is critical.

1. Increase the Focus on Operations

Phase I is usually approached more as a strategic initiative with activities that extend across the organization. Phase II adds more of a focus on the day-to-day on-the-ground reality. Phase I doesn't ignore the operational focus, but the focus needs to increase significantly in Phase II.

1. What is actually in place, what are people actually doing,
2. what do the current outcomes tell us in identified key areas?
3. How are people experiencing the initiative
4. How well are our processes and systems and policies aligned with DEI?
5. How is leadership being exercised in different areas and at different levels of the organization?

To find the highest leverage points it's critical to understand how the DEI efforts are showing up in people's day-to-day reality and target Phase II activities. That opens the door to deepening Phase I outcomes as well as going after the benefits that are tougher to achieve.

2. Focus on Extending the Leadership Web

In Phase II the operational and natural leaders take on more leadership – executives continue to consciously model, remove barriers, ensure resources and attention/accountability.

1. Are the leaders below the executive level clear on their roles and expected outcomes?
2. Which show the most potential or are in roles in units that offer the greatest opportunities?
3. Which oversee processes that offer the greatest opportunities?
4. Are they ready?
5. What targeted competency building needs to happen?
6. What support do they need?

3. Identify the High Leverage Points

Phase II is based on finding the highest leverage points for “holding the course” and achieving the desired ROI. That means being disciplined in finding the greatest leverage possible.

1. Where are the greatest opportunities?
2. Which areas have the strongest leadership to drive Phase II?
3. Which key organization design elements (processes, competencies, policies, etc.) can make the biggest difference?
4. Where are the areas of major resistance that are blocking key outcomes?

5. In which parts of the organization does motivation and energy need the most attention to get the desired outcomes?

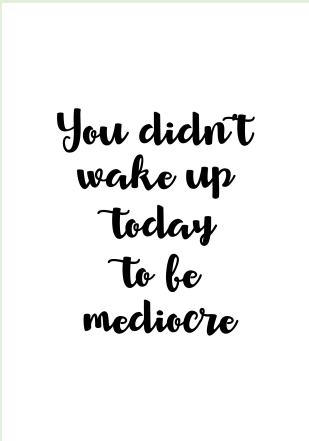
This is a matter of identifying where leadership focus and targeted action can have the greatest impact. By Phase II the organization may be looking harder at cost (the investment), so the return on any investment needs to be highlighted in order to maintain a ROI that justifies the initiative.

Identifying where the impact of efforts can be greatest (leadership leverage) is a key part of the ROI in Phase II. A disciplined assessment of Phase I and its outcomes should provide the basis for identifying the high leverage points in Phase II.

4. Focus on the Tougher Goals

Significant benefits can be achieved in Phase I, but many of the most valuable benefits are deceptively hard to achieve and take time and very targeted actions. This is particularly true of the business benefits that are often tougher to quantify and achieve.

1. It is critical to both celebrate the goals achieved in Phase I and the progress on tougher goals as well as commit to persevering in going after the tougher goals.
2. Tougher goals may require more attention and resources.
3. They may need more time.
4. They may benefit from revised metrics.
5. They will almost certainly require a focus on individual, group, and organizational changes and development and those efforts must be well targeted.



*You didn't
wake up
today
to be
mediocre*

5. Focus on Organization Design

Organization design will have been a focus in Phase I and it needs to continue to be a focus in Phase II.

1. What are the desired outcomes?

2. Have they changed from Phase I?
3. What are the basic strategies for achieving the desired outcomes?
4. How must they be revised for Phase II?
5. What does the organization's architecture need to look like (structure, roles, relationships, competencies, processes, systems, behavioral norms, etc.)?
6. What is in place and where does the focus need to be in Phase II?

6. Ensure that Leadership Roles and Core Strategies are Revised to Match Phase II Challenges

The themes and goals of Phase I and Phase II are complementary, and it is important that people throughout the organization understand and appreciate that. The phases differ in the focus of leadership, but the pivot in leadership can be almost seamless if well communicated and executed.

1. The integrated case for the DEI initiative (Why?)
2. Vision of the Desired State (Where?)
3. Leadership Commitment – Focus on Operational Leaders
4. Organization Design Required
5. Core Team and Leadership Web
6. Plans
7. Maintaining the Leadership Web
8. Competencies Developed
9. Communications Focused on Feedback and Response
10. Accountability – Frequent and Informal for Fast-Cycle Learning and Response
11. Managing the “Ripple Effect”
12. Align the People of the Organization
13. Attune the Things of the Organization

An overview of the model of roles and strategies for leading change is in the Addenda.

7. Focus on “Dynamic Accountability” - Track and Respond to Maintain Direction and Energy

One deceptive challenge is to ensure that the right metrics (qualitative and quantitative) are in place. Most of the metrics from Phase I will continue, but there may be new metrics for Phase II and some Phase I metrics may be revised based on the experience of Phase I.

The key to Phase II is to conduct frequent and informal “dynamic accountability” check-ins to complement formal accountability systems. These frequent and informal check-ins ensure that the initiatives stay on track, that key learning and responses happen quickly, and that energy is maintained. These “dynamic accountability check-ins” can be done in as little as 15 minutes and they can last several hours depending on the setting and desired outcomes. There are three key questions to be asked in these check-ins.

1. What do we have to celebrate – goal achievements, progress, worthy efforts – individual, group/team and organization-wide?
2. What have we learned – about DEI, about leadership and change, about ourselves, etc.?
3. What do we want to keep doing, start doing, or stop doing – calibrating action?

An overview chart of “dynamic accountability” is in the Addenda.

8. Ensure that DEI Awareness and Expertise and Change Leadership Capability are Integrated – and Both Develop at a High Rate

Phase II is heavily focused on driving the development of the required individual, group, and systemic changes and capabilities – but it also needs to maintain a focus on continuing to develop DEI awareness and expertise and fully embed the benefits already achieved in Phase I. This is a “both/and” issue, not an “either/or” issue. The challenge in both phases is to integrate the support. The balance just changes from Phase I to Phase II.



The Addenda

Addendum A - Making the Case(s) for a ROI Decision

**Addendum B - The Dangerous Pitfall for the C-Suite - Abdicating Leadership
("Game Over")**

Addendum C - Comparing Phase I and Phase II

Addendum D - The Leading Organizational Change Model

Addendum E - Dynamic Accountability



Addendum A

Making the Case(s) for a ROI Decision

One of the surprising aspects of a good ROI decision is the number of cases that can be combined to illustrate the potential ROI. Almost all organizations will have a moral case, and an internal business case. Many organizations will also have an external business case focused on potential advantages in its environment.

Each organization will have its own set of supporting cases, but they do have some common characteristics and benefits.

The Moral Case

Realizing the American dream through DEI initiatives is simply the right thing to do – the moral thing to do. Our founding was extraordinary, but it was not perfect. It was highly exclusionary (unless you were a white male landowner) and it's been a 250 year trajectory to overcome that. For example:

1. Racism (the toughest of the diversity challenges) is America's original sin, along with the treatment/abuse of America's Indigenous People. It has been built into America over 500 years. We either act to counter racism or we are a part of enabling it. There is no middle ground.
2. Leading a successful DEI initiative is a chance to model American greatness. America's greatness is not based on never having done anything wrong, but rather on its founding principles and values - and on America's relentless pursuit of those principles and values – often a process of 3 steps forward and 2 steps backward (at best). It calls on people's best – individually and collectively.
3. A culture's existence depends on the health of its institutions. America's corporate, civic, and governmental organizations make up a large part of America's institutions, so how the leaders of those organizations build them makes a very big difference in the health of America. America is an experiment, and its continuation is never guaranteed.

The Business Case – Internal

There are a surprising number of sustainable high impact benefits that can be achieved through designing and leading DEI initiatives with “strategic intent.” They are naturally

available, but do not develop naturally. They require intentional conscious leadership. For example:

1. Well designed and led DEI initiatives can have a major impact on recruitment and retention.
2. DEI initiatives can also have a major impact on the presence and performance of people – based on how much of a person is present in the work setting vs. how much of themselves people “leave in the parking lot” because of a lack of safety or commitment.
3. Critical qualities such as creativity and collaboration rely on safety and trust (particularly in cross boundary settings) and that can be significantly enhanced through DEI’s ability to decrease the threat of “others.”
4. The development of teams, particularly diverse teams, that are required for successful DEI initiatives prepares the ground for other teams pursuing operational outcomes.
5. Successfully pursuing meaningful DEI outcomes can build a surprisingly strong sense of esprit de corps in the organization, particularly a “no fear” approach to tough complex challenges – a major cultural impact.
6. High standards can be set with healthy accountability added – and those standards or norms can easily translate to other endeavors.
7. Leadership credibility can be dramatically enhanced by leading initiatives that are worthwhile and leading them successfully – particularly when led with the intention to “model the way.”
8. New leadership can be developed at multiple levels in the organization through guided participation in leading portions of the DEI initiative.

The key to gaining these benefits is initially defining them as goals and then pursuing them with conscious intent. Some will naturally occur, but a great deal rests on the intention and discipline of leadership. The setting and pursuit of both qualitative and quantitative measures is surprisingly important – partly to help define the goals and potential benefits and partly to track progress over time.

The Business Case – External

The nature and strength of the external business case will vary widely by industry or domain of activity. There may be market and competitive benefits that are possible, improved standing with regulators or financial sources, partnership opportunities, general standing in the community(s), etc. Some organizations will have a strong external business case and others will not.

There’s a difference between interest and commitment. When you’re

interested in doing something, you do it only when circumstances permit. When you're committed to something, you accept no excuses, only results."

Art Turock

A Note on Burnout

For a number of reasons burnout is currently a common challenge for organizations. After the Covid pandemic a large proportion of the population is burned out or close to it. That is particularly true for industries such as healthcare where the pressure has increased at the same time that people are leaving.

If leaders do not design and implement DEI with clear intent and discipline it will almost certainly add to the burnout of people. So, it is critical to ensure that any DEI initiative does not add to the burnout pressure.



In fact, a core strategy is to design and implement DEI as a way to actually add energy for people. That does not happen naturally, so it's a matter of leadership intent and discipline.

This is why the ROI approach is so important – the ROI not just for the organization, but also for individuals, groups, and teams. “If we are successful with our DEI initiative, how might that improve my experience and/or that of my group or team?”

3 Keys for a Good ROI Picture

1. Pull from each case (moral and business) to get the most compelling ROI.
2. Be particularly disciplined in identifying the business-oriented outcomes to be achieved – beyond HR outcomes. This can be challenging, but it's worth the effort.

Some of these outcomes may become evident with experience as the journey progresses.

3. Wherever possible ensure that each desired outcome can be measured – quantitative and/or qualitative measures. Some outcomes are easier to measure than others



Addendum B The Dangerous Pitfall for the C-Suite Abdicating Leadership (“Game Over”)

For DEI initiatives, the common danger for C-Suites is delegating too much responsibility too fast. In countering racism through DEI initiatives this is a very common danger, and it really does lead down the path to mediocrity. DEI initiatives are complex and emotionally charged. They require committed and sustained C-Suite leadership, including “modeling the way.”



DEI initiatives are simply too tough a challenge and operate on too many levels for the C-Suite to delegate too much responsibility too fast. DEI initiatives involve leadership at the individual, group, systemic, and cultural levels. Senior leadership must lead on all of those levels, particularly in the beginning.

However, DEI initiatives are a different challenge for C-Suites than the normal organizational challenges and require a surprising amount of courage and stretching by C-Suites to lead them effectively.

“In periods where there is no leadership society stands still.”
Harry S. Truman

Why the C-Suite Must Commit to Be Fully Present in the Lead Role

The C-Suite needs to be fully present in order to actively lead DEI efforts – a level of leadership that is required because DEI initiatives involve change at the cultural and systemic levels as well as the group and individual levels. And that leadership needs to be obvious and sustained in order to match the difficulty and complexity of the challenge.

It is the foundation on which the extended leadership throughout the organization depends.

The C-Suite has perspective, leverage and can inspire the confidence needed. The C-Suite is positioned to see the potential benefits and it has the power to effectively lead the efforts to achieve them – from aligning the Board and organization design to leading the journey and removing barriers. No one else in the organization has the leadership leverage required. Nor can anyone else have the same impact in “modeling the way” and calling forth people’s best.

“When the C-Suite wiggles, everyone else gets whiplash.”

Simply put - without active sustained leadership from the C-Suite, organizations are pursuing mediocrity. There are some rare exceptions, but those exceptions are extraordinarily rare.

When the C-Suite leads, a web of aligned leaders and followers can support that lead. Supporting roles and structures, need to be in place to support the C-Suite. Key players to naturally be engaged early are usually Chief Diversity Officers, Diversity Councils, direct reports, key natural leaders, and selected outside experts.

It’s a “Warrior Challenge” for the C-Suite

There are lots of definitions of warriors’ codes, but a simple and inclusive one that is appropriate here is that a warrior “engages fully and with purpose and excitement.” This is the opposite of the approach where the C-Suite sits back to see what others can make happen.

A warrior approach is a full commitment of character and competence that is not diminished by fears of the experience or potential poor outcomes. It requires the courage to “be all in” in the face of a journey that will be full of unknowns and daunting tests. Everyone will look to see if the C-Suite is all in.

“There are only two options regarding commitment; you’re either in or you’re out. There’s no such thing as life in-between.”

Pat Riley

It also requires an openness to learning – rapidly. Leading DEI initiatives is new ground. Very few people have been here before and there is a good deal to learn. Racism has been built into our lives for 500 years and it lives in our communities, our organizations and ourselves. And much of how it lives is invisible – at an unconscious level or invisible because we don’t know how to look.

Therefore, part of the challenge for C-Suites is to take the lead and model rapid deep learning about the challenges of dealing with diversity – our differences or “otherness.” How does it live in the execs of the C-Suite, how does it live in the C-Suite as a group, how does it live in the organization, and how does it live in the community.

Remember. This learning is focused on a deep, complex, and emotionally charged topic. It is not the same as learning a skill or even a new role. It asks much more.

That is part of the “all in” warrior code and the best outcomes include an increased sense of positive urgency; increased confidence in being able to design effective DEI strategies and structures; and increased confidence in “modeling the way” and leading the required change. In other words, being “all in” should lead to an enhanced C-Suite confident in leading in new territory.

“If you are entrusted with bringing about change, you likely possess the knowledge needed to advance the organization, and you might have a plan – but knowledge is not enough. You have to bring yourself to each interaction in a deeply authentic way. People don’t care how much you know until they know how much you care.”

Doug Conant

“Modeling the Way”

No one in the organization will miss this modeling if it is done with some intention and transparency. The C-Suite is essentially saying, “As an organization we are going into the unknown and we as the C-Suite are going first – with full commitment and confidence.” What others also hear – without it ever being said – is, “...and we expect you to follow us with full commitment.”

It’s simple. If the C-Suite is not modeling such a warrior approach, the organization will simply not follow and take a similar warrior approach, the efforts will not match the challenge, and the results will be disappointing. The DEI challenge is simply that tough. The leadership role that the C-Suite takes is the foundation for the journey – the foundation on which everything else relies.

Modeling the wrong thing. One major problem with the C-Suite abdicating leadership is that it demonstrates for the whole organization that they are not the owners, do not have the confidence, and cannot be counted on to deal with an extremely tough challenge. Leaders exert a tremendous amount of power when they model behavior (no one misses it) and modeling stepping away is lost on no one.

Abandoning that leadership presence almost guarantees the pursuit of mediocrity for the organization. There is little to no chance that the organization will successfully answer the “Why?” question or successfully execute the CSFs for Phase I leadership if executives delegate too much too fast.

The Two C-Suite Leadership Strategies for Avoiding the Pitfall

There are two strategies that the C-Suite can employ to maintain the required leadership presence. They are both well within the capabilities of C-Suites, but they are not easy – particularly the first strategy. The good news is that, done well, these two strategies combine to counter this pitfall very effectively.

Strategy #1 Confront the 3 “Guardians of the Threshold” – The First Big Challenge

Strategy #2 “Model the Way” - As Individuals and as a Team

“A ship is always safe at shore, but that’s not what it’s built for.”

Albert Einstein

Strategy #1 Commit to the Lead Role & Confront the Three “Guardians of the Threshold”

A DEI initiative is a journey, not a project. And the tipping point is right at the beginning – at the threshold or beginning of the journey. That’s where the C-Suite encounters the three “guardians of the threshold.” In the classic myth of the heroic journey (which is the fundamental story of change) there are guardians of the threshold, which are designed to turn us back if we’re not ready for the journey. They are the first tests on the journey.

These three guardians are normal and natural, and they cannot be avoided. When not confronted directly, and without a serious commitment to deal with them, they put the organization on the path to DEI mediocrity – at best. That is because they undermine C-Suite engagement and presence, and that is the end of any pursuit of excellence.

Who are these “Guardians of the Threshold”

There are three natural and unavoidable guardians in any DEI initiative. They are perfectly capable of stopping or condemning a DEI initiative to mediocrity - if they are not acknowledged and dealt with, particularly by the C-Suite.

Guardian #1 A Natural Indictment. An unavoidable sense of indictment for White people regarding racism, for men regarding sexism, etc.

Guardian #2 Anxiety About Venturing into the Unknown & Potential Loss. The requirement to face a great deal of unknown and a range of potential losses – from large to small – from real to imagined

Guardian #3 The Specter of Incompetence. Not being confident about having all the competencies required by the challenge

These Guardians are Toughest on the C-Suite

These three guardians naturally – and unavoidably - confront people at all levels of the organization, but they are particularly tough for the C-Suite. These guardians are toughest at the C-Suite level because executives are not allowed to be wrong, unsure, lose, or be incompetent to any degree. It's not fair, but that's the way it feels – just the way it works with hierarchies. And members of C-Suites are usually their own toughest critics.



Successfully Dealing with the “Three Guardians of the Threshold”

Having made the commitment to confront the three guardians of the threshold, the question then becomes, “How do we successfully deal with them?” Fortunately, there is a set of critical success factors (CSFs) that can provide a lot of guidance and confidence and position the C-Suite for success in its central role. These CSFs deal with all three of the guardians of the threshold – as well as fitting with basic change leadership models that support the entirety of the journey.

The Basic CSFs for Each Guardian

Guardian #1: Acknowledge the Unavoidable Natural Indictment and Replace Any Guilt with the Power of Responsibility

The natural indictment is addressed by simply adopting a posture that “I’m not to blame for DEI gaps, but I am responsible as the CEO/member of the C-Suite for dealing effectively with it in our organization. I know this is one of the toughest challenges we will face and that we will need to take on a warrior approach to be successful. That is my commitment.”

There is little productive power in guilt. There is a great deal of power in taking responsibility to drive wise intentional action.



Guardian #2: Put the Unknown and Potential Loss in Perspective

There is no way to take all of the unknown out of the journey – there never is in significant change. This is a particularly severe problem with DEI initiatives because there is no single playbook and few examples of success. However, when the C-Suite is committed to being out-front and visible in “modeling the way”, it makes a big difference as fear of the unknown or potential losses shrinks.

First, when the C-Suit leads in developing the vision of the desired state, the core strategies to achieve it, the web of leaders to execute the strategies, and commits to building the competencies required for success, the journey becomes much more “knowable”, and people believe they can find their way.

Second, C-Suite leadership also decreases the fear of loss as the desired end state and journey clearly have lots of continuity and there are valuable benefits to be achieved. Addressing the potential losses directly – from potential privilege/advantage to self-image to threats to relationships, success, or career paths – can dramatically decrease anxiety that is normal and natural to DEI initiatives.



Guardian #3: Build on Strength - Focus on the 90% of Current Competencies and Define the 10% of New Competencies Required

This is the guardian that is deceptively problematic. However, the reality in most cases is that the C-Suite already has 90% of the core competencies required for successful DEI initiatives because they are the competencies required for any successful organizational improvement effort. The 10% of new competencies required can be developed with confidence and model for others how the leaders confidently acquire new competencies to meet new challenges.

That is a powerful message to the organization about being confident effective leaders in a changing competitive world. Not only does it “model the way” and build credibility for leading the DEI initiative, but it also builds the C-Suite’s leadership credibility in general. In fact, this is an exceptional opportunity to build that credibility.



Strategy #2 “Model the Way” As Individuals and as a Team

There are a few key areas in which consciously modeling the way can dramatically increase the impact of the C-Suite on DEI initiatives. Those are noted below for individual C-Suite members and for the C-Suite as a team. There are four noted for individuals and only two for the team category because they are always high impact. But they should not limit the focus when opportunities present themselves in a particular setting.

“What you are speaking so loudly, I can’t hear what you are saying.”
Ralph Waldo Emerson

“Model the Way” as an Individual C-Suite Member

“How do I deploy myself as a leader?” This is always a critical question for the C-Suite. In the case of leading DEI initiatives, it is essential for the C-Suite to ask and answer that question as there is a tremendous amount of leverage in the answers. There is particular leverage in the following four guidelines.

1. **Be conscious and disciplined.** Understand the importance of “modeling the way” and commit to consciously choosing the behaviors to model and the settings in which to model them. People throughout the organization (and beyond) closely watch C-Suite members to see what is valued. Actually, as a C-Suite member you really can’t “not model the way” because people will interpret whatever they see or hear. So, it’s important to value the role, decide what to model and model it with discipline.
2. **Focus on Your Current Core Competencies.** Focus on deploying the core competencies that you already have (probably 90% of what’s required). Those competencies will be foundational for designing and successfully implementing DEI initiatives and clearly being confident in them will build people’s confidence in the C-Suite and the initiative - and will encourage them to be confident in their abilities. This modeling helps establish a “building on strength” approach for the whole organization, which is essential.



3. **Identify the New Competencies Needed and Develop them Rapidly.** Identify the other 10% of specific competencies required – they may be new or simply deeper competencies. Model confident total commitment to rapid competency development as others will need to follow your example (and they will).
4. **Beat Anxiety with Excitement and Confidence.** Model excitement and “no fear” in going after the development of the new competencies and engaging the DEI challenges. Not only will this provide access to the best of the C-Suite and accelerate new competency development - it will also “infect” the rest of the

organization. This is not about diminishing how tough and complex the DEI challenge is. It is about taking on that challenge with obvious excitement and confidence.

“Nothing is so contagious as example; and we never do any great good or evil which does not create its like.”

Francois de la Rochefoucauld

“Model the Way” as a C-Suite Team

If DEI initiatives are true priorities for the organization, that needs to be clearly modeled by the C-Suite as a unit. Everyone watches the C-Suite to see what’s really important. Fortunately, there are a few things the C-Suite can consistently do to effectively communicate commitment and professionalism. Combined with the personal CSFs, this provides powerful leadership that no one misses.

- 1. Ensure High DEI Visibility.** Keep DEI on the C-Suite agenda (shows it is a priority and provides space to effectively address the issues). Keep it on other agendas where the C-Suite is involved. People pay attention to what the C-Suite prioritizes and pays attention to.
- 2. Model Healthy Accountability.** This is best done with frequent and informal “check-ins” with transparency within the C-Suite - and across the organization. What do we have to celebrate (particularly progress and interim achievements); what have we learned: what will we keep doing, start doing or stop doing? This reinforces DEI as a priority and fast cycle learning and calibrating action as the style.

These check-ins are based on the measures chosen – both quantitative and qualitative as well as the commitments made by the C-Suite regarding its role. Modeling the form of these check-ins dramatically increases the likelihood that others will follow and hold themselves accountable in a healthy way.

There are only two items here, but that’s all that is necessary to have a major impact.

“Few things are harder to put up with than the annoyance of a good example.”

Mark Twain



**Addendum C
Comparing Phase I and Phase II**

The chart below compares the themes, goals, and key areas of leadership focus of the two phases. Although the two phases are distinctly different, they are complementary and Phase II builds on Phase I.

Although the leadership pivot in Phase II is essential and substantive, it does not need to be disruptive. Not pivoting, however, will very likely lead to mediocrity and disappointment.

“It’s not that I’m so smart, it’s just that I stay with problems longer.”
Albert Einstein

“I was taught the way of progress is neither swift nor easy.”
Marie Curie

Comparison of Leadership in Phase I and Phase II

	Phase I	Phase II
Theme	<p>Create the right design and launch the initiative effectively.</p> <p>This is the classic change leadership phase where the case is made for change, the vision is created, the organizational design elements are defined and plans for guiding the change are put in</p>	<p>Pivot leadership to “hold the course and drive it home.”</p> <p>Phase I will have set the direction, including the vision, and the core strategies and tactics. It will also have engaged people and generated the initial energy.</p>

	place. Executive leadership is the critical leadership level.	Phase II must assess where the organization is on the path and what leadership must do to ensure success as plans meet reality.
Goal	<p>Engage people and move the needles.</p> <p>This is the phase where people are engaged and aligned on direction, momentum is created, and initial outcomes are achieved.</p>	<p>Maintain direction and energy and continue to move the needles.</p> <p>Phase I will realize some of the desired outcomes, but it can only “move the needles” so far.</p> <p>Phase II must focus on the leverage to continue to move the needles, with a likely focus on the business-oriented goals, such as innovation, market penetration, team-work, cross-boundary collaboration, etc.</p>
Leadership Focus	Phase I	Phase II
	<p>1. Focus on making a powerful case for the initiative. This is where correctly answering the “Why?” question comes into play. The case must contain both the moral and business cases and it must be clear and compelling.</p>	<p>1. Focus on Operations Phase II has an increased focus on the day-to-day on-the-ground reality. What is actually in place, what are people actually doing and experiencing, and what do the outcomes tell us?</p>
	<p>2. Answer the “Where?” Question. Create a clear and compelling “vision of</p>	<p>2. Focus on the Leadership Web</p>

	<p>the desired state” that is worth pursuing (speaking to the head and the heart)</p>	<p>The operational leaders and natural leaders take on more leadership – executives continue to consciously model, remove barriers, ensure resources and attention/accountability.</p>
	<p>3. Focus on establishing the leadership commitment and leadership structure. This is what people can expect from leadership. It also includes the design and membership of the core leadership team and the extended web of leaders that will be developed.</p>	<p>3. Identify the High Leverage Points Where are the greatest opportunities; strongest leadership; key organization design elements (processes, competencies, policies, etc.) – where leadership focus and action can have the greatest impact.</p>
	<p>4. Focus on the key organization design elements. The focus is on the elements that create the “architecture” of the organization. That includes the “things” such as structure, policy, processes, technologies, etc. It also includes the “people” elements, such as competencies, relationships, roles, etc.</p>	<p>4. Focus on the Tougher Goals Some DEI goals are just tougher than others. Phase II focuses on these tougher goals, particularly the business benefits that are tougher to quantify and achieve</p>
	<p>5. Focus on creating the roadmap for the journey – plans, resources, accountability. What are the expected outcomes, strategies, tactics, and timing? What resources will be committed? How</p>	<p>5. Focus on Organization Design. What are the desired outcomes? Have they changed from Phase I? What are the basic strategies for achieving the desired outcomes?</p>

	will we hold ourselves accountable?	What does the organization's architecture need to look like (structure, roles, relationships, competencies, processes, systems, behavioral norms, etc.)?
	<p>6. Focus on building the required awareness and competencies. This is deceptively important because resistance will be too high if people do not feel that they will be competent in the desired future. Competence is the complement to awareness. Competence must be developed at the individual, group/team, and organizational levels.</p>	<p>6. Focus on revising the high leverage core strategies for each of the six leadership roles. Fortunately, the leadership roles and their core strategies will still be relevant in Phase II, but some will be higher leverage, and some revisions will be necessary to respond to the unfolding reality.</p>
	<p>7. Focus on the initial assessment of the impact ("good and bad") that the desired changes may have on the organization. A good impact assessment will highlight where plans need to be revised and where leadership needs to pay particular attention. It can prevent many of the negative surprises and avoidable setbacks and costs.</p>	<p>7. Track and Respond to Maintain Direction and Energy Phase II relies on fast cycle learning and response through frequent and informal "dynamic accountability" to complement formal accountability systems.</p> <p>There may also be some revisions of the measures used based on experience or new goals.</p>

***"Act as if what you do makes a difference. It Does."* William James**



Addendum D

The Leading Organizational Change Model

This model is based on the classic myth of the heroic journey. That is because the heroic journey is THE fundamental story of change – whether individual, group/team, organizational or community.

Change always shows up in unique ways, but the foundation is the same and the six leadership roles, each with three cores strategies, can be trusted and adapted to fit.

The model is outlined below, but there is a large website with much more detail at <http://www.heroicleaders.com/>

A mid-course assessment chart is included below that lays out the six leadership roles and their core strategies (three each). There is space for assessing progress to date as well as identifying where the leverage is going forward. This can be done as many times as desired over the course of a journey of change.

Mid-Course Check on Leadership Strategy Success

Looking Ahead & Looking Back

	Leadership Role	Strategy	*Leverage 1 / 2 / 3	*Success A / B / C	Next Steps
ACT I	Visionary	#1 Build the Business Case			
		#2 Create the Vision			
		#3 Establish the Leadership Commitment			
	Architect	#4 Create the Organization Design			
		#5 Build the Journey Plan			
		#6 Create the Leadership Web			
ACT II	Catalyst	#7 Extend the Web			
		#8 Operationalize the Vision			
		#9 Prep the People & Organization			
	Guide	#10 Create a System for Communications			
		#11 Support People in Letting Go & Inbetweenity			
		#12 Establish a System of Accountability			
	Builder	#13 Maintain the Web			
		#14 Build Competency			
		#15 Support People in the Mastery Process			
ACT III	Integrator	#16 Manage the Ripple Effect			
		#17 Align the Organization			
		#18 Attune the People			

<p>*Leverage</p> <p>1 = High Leverage 2 = Moderate Leverage 3 = Low Leverage</p>	<p>*Success</p> <p>A = Highly Successful B = Moderately Successful C = Not Successful</p>
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Addendum E Dynamic Accountability

This is a very straightforward model for frequent informal “check-ins’ to easily maintain direction and energy. The check-ins can be done with any group and with whatever frequency will provide the most benefit. One surprising benefit of employing this model of accountability (“how are we doing?) is that it is a natural way to build teams or communities.

Dynamic Accountability

The Three Steps



Celebrate. Celebrate interim achievements, final achievements, and worthy efforts (even if our worthy efforts weren't as successful as we hoped).



Learn. Learn from experience to date. The range of potential learning is exceptionally broad. In reality, the truth about how we succeed in significant undertakings is that we “learn the way.”



Determine “Right Action.” Determine the right actions to take, given the experience to date and what has been learned. For instance, determine what to (a) keep doing or do more of, (b) stop doing or do less of, or (c) start doing.

The Principles

- Be disciplined in following all 3 steps: celebrate, learn, and take “right action.” Each step provides an essential set of benefits.
- Do it frequently to (a) gain the most benefits and (b) keep accountability from becoming too “heavy” or onerous.
- Keep it simple and informal (being formal occasionally is OK).
- Accountability has a bad rap for good reasons. Integrating Dynamic Accountability into how our organization works will take time and perseverance, but it will be self-sustaining once instituted.