

CLOSING KEYNOTE ADDRESS

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In this talk I spoke from my long experience in starting and building entrepreneurial businesses and, more importantly, about my more recent work in turning around several failing institutions and the many challenges of effectively implementing and managing change in established businesses even in the face of existential threats to their continued well-being. Change is easy—overcoming the resistance to change takes a little more work and a great deal of patience and preparation.

In applying the lessons from my various adventures to our industry's present concerns and issues, I started with a simple suggestion. In today's aggressively "dollar and sense" economy, where it is crucial to demonstrate and justify virtually every activity (and especially research and analysis) to senior management, it's important to have a strategy and approach which makes the value and relevance of your activities apparent to the entire organization. My suggestion was that we turn the "tools of our trade" inward and we use our skills and strengths to support and help better inform and educate the teams trying to "sell" and manage the ongoing (and often radical) changes occurring within our own organizations. This transition is actually an easier and more doable task than it might first appear because the references and methodologies we employ are precisely the techniques needed today to allay organizational fears and to ease the path to progress (thru change) for our peers and ourselves.

My shorthand for the entire idea was: "I Have Seen this Movie Before". The basic idea (discussed in more detail below) is that there are problems and issues that consistently occur at various times in every business and there are also *discoverable*, concrete, recurring and reusable methods and solutions for each of these problems. Our "new" job within our organizations is to find what has worked and what is working now and to identify and generalize these solutions and then to share and distribute these effective approaches throughout the rest of the business. Easy to say—hard, but important, to accomplish.

THE PERSPIRATION PRINCIPLES

In terms of some ground rules and concepts for implementing change within any organization, I presented what I call "The Perspiration Principles":

1. Tell a Simple Story – Who are We? Where are We Headed? Why?

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2. Solve an Important Problem – Increase Productivity or Save Time or Money – Pain Points
3. Keep Moving and Raise the Bar – Aim High - Feasibility Will Compromise You Soon Enough
4. Start with What You Have – Don't Wait for Perfect – Successive Approximation
5. Make “Cheap” Mistakes and Make It O.K. to Make Mistakes
6. Make Room for People
7. Don't Be a Slave to Your Model – The First Rule of Holes – If You're in One, Stop Digging
8. You Can't Add Value Unless You Have Values
9. Face the Facts and Expect the Worst
10. Work from the Inside Out

THE BASIC METHODOLOGY - PATTERN RECOGNITION

We live in an increasingly complicated world where simple is always better. In terms of the communication and the “sale” of changes, the basic objective is to demonstrate that what appears to be abrupt or radical change is actually and simply an extension from and the evolution of things we've done comfortably and successfully in the past. Gathering the references, assembling the examples and documenting the success stories of prior cases where things worked is a critical part of the process and one that relies heavily on the skills which our industry's professionals regularly employ. Essentially, the pitch is that the more things change, the more they remain the same.

The key here is to understand the old Hollywood idea of “high concept” presentations or pitches. Where metaphors and analogies are everything. “It's Top Gun Underwater”. “It's West Side Story in Outer Space”. Elevator pitches and shorthand stories all function in the same way—they are succinct ways of telling people what they want to hear.

In times of anxiety and change, familiarity doesn't breed contempt; it can mean comfort, company and confidence. Company is especially pivotal because most people don't mind moving forward, they just don't want to do it by themselves or be alone when they get there. The fact is that sometimes you just can't see something right in front of you until it is put in the proper framework and context so that you can process and understand it in terms that you are already familiar and comfortable with. Analogies and references are the tools that provide the necessary context in business. A compelling analogy is worth hours of argument and pounds of proof.

The questions that drive this approach are simple: What Has Worked for Us Before? How Did We Solve a Similar Problem in the Past? Can We Adapt, Reuse or Copy a Prior Approach? Or better yet, Can We Steal Someone Else's Really Good Idea/Solution? When you go with what has worked in the past and tweak it for the present, it's easier to explain,

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it's a proven answer in many cases, and it's a cheaper, faster and more productive path forward.

But be careful not to “mash the metaphor” since if you push things too far or stretch the connection too much, the reaction will be prompt and negative. Familiarity breeds comfort until it suddenly breeds contempt. Yesterday's hero, etc.

THE IMPLEMENTATION PROCESS

As a set of basic guidelines, I offer the following suggestions for starting the process once you have identified the objectives and the solutions you will be implementing:

1. Gather Internal Support Before Making Major Changes (Unless There's a Crisis)
2. Make All the Procedural Changes ASAP to Get Them Out of the Way
3. Rely Upon and Employ the Existing Management and Governance Channels – Not New Ones
4. Consult, Collaborate and Communicate – Slowly, but Continually & Aggressively, if Necessary
5. Incorporate and Absorb the Culture - Recruit and Listen Carefully to Internal Opinion Leaders
6. Develop a Vision of the Future that Everyone in the Organization Shares and Aspires to
7. Once You Have Done the Necessary Preparation, Don't Wait. Act Immediately.