

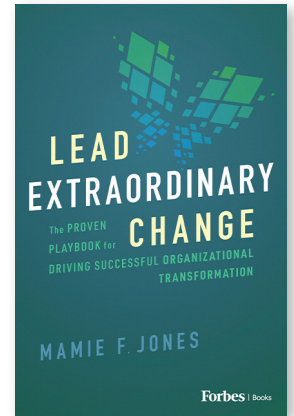


Executive Book Summaries®

Lead Extraordinary Change

The Proven Playbook for Driving Successful Organizational Transformation

by **Mamie F. Jones**



Contents

Chapter 1: Ingredients for Success

Page 2

Chapter 2: Listen and Learn

Page 3

Chapter 4: Kick-Start the Journey

Page 5

Chapter 5: Commit to Stay the Course

Page 6

THE SUMMARY IN BRIEF

Transformation is hard, which is why most efforts will fail. Having guidelines to lead dramatic change can significantly improve outcomes, taking organizations and teams to the next level.

Lead Extraordinary Change: The Proven Playbook for Driving Successful Organizational Transformation has been called “the best kind of business book, because rather than academic analysis, it is based on [a] wonderful career path.”

Author Mamie F. Jones has over 35 years of experience of leading transformation efforts with multiple organizations and teams. Based on her know-how, Jones developed a proven playbook for anyone who wants to drive dramatic change and produce extraordinary results.

IN THIS EXECUTIVE BOOK SUMMARY:

- Adjust your own mindset and approach to leadership to make transformations easier.
- Create the right environment for change.
- Inspire others to embrace change, moving the transformation into high gear.
- Develop a transformation culture within the organization.

Chapter 1: Ingredients for Success

What drives the need for transformational change in an organization? Usually it's because the company, business unit, or team is not performing against the organization's vision or strategic goals. It often faces competitive threats, industry disruptions, or other organizational challenges. When a company faces the need for extraordinary change, the organization's leadership looks for people who can come in and alter the trajectory of the current state.

If this describes what you are facing, then you need to start by assessing if you're in a position to drive the change.

To be successful, you must evaluate your current work environment and the leadership willingness and capability to support change. This is the foundation of any transformation effort, and if this foundation is not in place, your efforts may be jeopardized.

What fits your situation?

(A) You've been asked to join a new company that wants you to lead or help drive transformation

(B) You've recently joined a company that's asked you to lead or help drive transformation or

(C) You've been working in a company for a while and have been asked to lead or drive transformation

Whether you are (A), (B), or (C), you might not realize that you can assess the environment you are working in or are about to join and determine if you're in the right position to be successful in the difficult journey of transformation. Many people might think they know the environment, but they will need to follow the same process I'm proposing, as there are many aspects that will surprise you in conducting your evaluation.

There are several ingredients for success, and while each one is important, they may not all be present in your environment. However, a good portion should be present to varying degrees.

1. Support

You obviously won't have everyone's support, but you do need to have the right support.

2. Autonomy

There is nothing more important than having autonomy. The opposite of autonomy is micromanagement. If you

are being asked to take on a significant task, fraught with risk, you need to know whether you have the right kind of independence to make the required important but tough decisions.

3. Meritocracy or Biased Performance Management

Does your organization recognize employees based on their demonstrated abilities and merit? In a meritocracy, this is imperative. Without concrete goals, the wrong people will be rewarded or promoted—and often not based on their achievements. This creates a negative culture that employees will despise.

4. Compelling Vision

Everyone hates empty slogans, and for good reason, but having a great, compelling vision is imperative. Otherwise, people will just continue doing what they've always done, which of course limits what you can achieve. There is a wonderful saying that I use frequently: "The thinking that got us here won't get us out."

5. HR Support

You will step on toes when it comes to making people decisions. Some employees will leave voluntarily while others will leave involuntarily. The question here is whether HR is ready to support you in making tough people decisions.

6. Data or Supposition?

When "I think," "I feel," and "I believe" phrases are being used to make decisions, it is a bad sign. This is where you need to look at whether your organization is making decisions based on facts or feelings.

Once you have assessed your environment for the ingredients for success, there are other important elements that you will need to focus your attention on:

- Identify great talent
- Identify change agents
- Make a statement early
- Expect resistance
- Document current state and demonstrate small wins early
- Be persistent

In meetings where there may be differences of opinion, active listening is even more important.

Chapter 2: Listen and Learn

The goal of this stage in the process is to understand what is happening in the workplace on a grassroots level by actively listening and learning.

Regardless of your situation, you really have one shot to get this Listen and Learn stage of the playbook right. It sets the stage for the rest of the playbook, and you may find yourself coming back to this section as a refresher.

It all begins with active listening. I can't stress how important this skill is. You might agree to the idea in theory, and find many others who will likewise agree, but you will be surprised to find how little active listening actually occurs.

In meetings where there may be differences of opinion, active listening is even more important. Contention can often stem from a person's emotional attachment to a particular point or idea, and they are "taking up all the oxygen" in the room. This where diplomatic curiosity comes into play.

As you begin interacting with your team, you will be creating an environment where people will come to know you as an active listener and that you want to learn from them in a genuine way. You will hear from your team and the relevant stakeholders, some of which will highlight different aspects of the culture. As you do this, you will begin to understand the organization and the team culture more deeply.

Listen and Learn starts with understanding the current state of your organization. As mentioned earlier, the current state is the baseline for measuring improvement. If you do not set a baseline, your goals will not be based on concrete data, and results will be difficult to prove.

Spending time with your team members and understanding what's on their mind is key to the Listen and Learn process. Here are the steps I follow:

- Talk to every team member
- Make it safe—and be genuine
- Use a script
- Capture quotes

- Assemble the themes and quotes
- Share what you have learned with your direct leadership team
- Prepare for an all-team off -site

Remember: the biggest change you will face in your transformation efforts is the people. You can't just flip a switch. Transformation is an ongoing process that takes patience and persistence. You will find when you start making talent changes to the team, negative feedback can follow from others. Relationships have been forged over time, and when you disrupt these relationships that serve others well, it results in difficult conversations. Yet as you make positive changes to the team and begin showing results, you will build trust over time with those that challenge you.

Chapter 3: Bring the Burning Platform to Life

The Listen and Learn process begins to create the right environment for change. Now it's time to bring the burning platform to life through capturing hearts and minds.

The phrase "burning platform" is often used in transformation efforts and refers to getting people to understand for themselves that there is a desperate need for change and no time to waste—that they are standing on a "burning platform." Up to this point, your team knows that you have been brought in to fill a leadership role, but many do not know the extent of what needs to change. Others already know they are on a "burning platform," but they don't know what to do about it.

To bring this burning platform to life, the next step is to share all you have learned up to now with the whole team in a two-day off-site. This takes place after your Listen and Learn interviews and after you have documented your themes and quotes.

The objective of the off -site is to get as many team members as possible into the same room for two days and have them understand the current state—and then take ownership of the needed change.

I've learned that you cannot move into the broader team off-site without bringing your leadership team on board. The leadership team needs to understand, at a high level, what is going to be on the agenda—but not all the details or activities. They need to experience the off-site for themselves and will need to make their own commitments to move forward. However, they do need to know that you have a plan, and you have certain requirements for them.

This all will get them prepared for the larger upcoming team off-site. Here is what you need to do in this meeting to help prepare your leadership team:

- Set the tone
- Observe
- Give time for reflection
- Engage in some dialogue, get some feedback

Checklist for the Off-Site:

1. Select and book a venue for accommodations and meeting room—for local team members, pick a venue that is centrally located so travel time is considered.
2. Design meeting room with hotel liaison (ballroom).
 - Round tables with chairs with floor-length tablecloths to accommodate ten people.
 - Determine decorations for room, tables, etc. Hotel liaison will help with this.
 - Create decorations for themes (on the wall, hanging from the ceiling, tents on the table are all options).
 - Order audiovisuals for room: projector, screen, podium, podium microphone and handheld microphones for open discussions, video recording for commercials, etc.
 - Select and play upbeat music in the meeting room when the team enters and at all breaks. - Tables needed for food and snacks.
 - Table and chairs for executive coordinators.
3. Create team table assignments.
4. Select and order food with hotel liaison (really important) and ensure all food options include options for vegetarians, vegan, paleo, keto, gluten-free, etc.
 - Breakfast with coffee and continental breakfast.
 - Morning snacks (be creative).
 - Lunch buffet.

- Afternoon snacks (be creative).
 - Dinner in the venue or adjacent to the venue.
 - Have goodies on the tables like candies, stress balls, etc.
5. Materials needed for meeting.
 - Name tags.
 - Flip charts for each table.
 - Writing utensils for each table.
 - The name of the theme on the table should be very visible—tents.
 - Pens and writing tablets for each team member on the table.
 - Create a large board to highlight themes and for the team to select the top three themes.
 - Sticky circles for the team to select top three themes.
 - Create PowerPoints for the team to work from (their homework the first night).
 - Create PowerPoints to give team instruction for activities (commercial). This is included in the overall PowerPoint for the entire off-site.
 - Create overall PowerPoint to show agendas, and it runs for the entire off-site with timing to stay on track. Ensure ample breaks.
 - Buy props and bins for the commercials and have these under the theme tables (whacky items along with appropriate props to create commercial based on industry).
 6. Arrange for executives to attend the meeting for the commercial and judging portion.
 - Have awards created for first, second, and third places.
 7. Arrange for entertainment (after dinner on the first night).
 8. Have at least two coordinators in the meeting at all times. Distribute name tags, create all the PowerPoints, work with the hotel liaison for food timing and snacks, address issues as they arise, etc. This is typically executive assistants who address all issues and help keep the meeting on track.

Chapter 4: Kick-Start the Journey

Up until now, you have engaged in active listening, done your homework, understood where many of the challenges were, have gained a good understanding of the culture, and taken all that you learned to your off-site. Here you

I find the hardest part of implementing change is the need to upgrade talent.

brought the burning platform to life and captured the commitment from your team on what needs to be tackled. If all has gone well, they are on board, and it's time to springboard off that momentum.

It's now time to kick-start the journey by making bold moves and taking big swings. This revolves around setting aspirational goals within each of the three pillars of People, Process, and Platform. I find the hardest part of implementing change is the need to upgrade talent, which is the focus of the People pillar. It requires hiring the right leadership and talent, and it requires setting skill and behavioral goals. As you introduce these changes, some people will struggle and need to adapt to a new way of thinking, working, and learning. For many, these changes can introduce uncertainty, which can trigger a stress response; for others it is a welcome change and infuses excitement. There are still others that will experience anxiety when they realize they will need to improve their skills, adopt new processes, and lose their comfortable routines.

There are three areas of focus that need to be addressed as you begin your talent upgrade:

1. Your leadership team
2. Setting aspirational goals
3. Addressing behaviors

The next step involves transforming your process.

When making this kind of process change, there is typically an S-curve experience, which basically means you need to “go slow to go fast.” The S-curve shows a new process from its slow early beginnings to an acceleration phase. As the process matures, it moves to stabilization over time, as was the case for us. I needed to reassure our teams that this was normal. I also told them there would be an initial dip in productivity, but they needed to trust that once the teams were up to speed, our speed of development would actually accelerate.

We monitored our progress through daily stand-up meetings (“daily scrums”). These meetings keep people in-

formed, aligned, and focused. They are fifteen minutes long, are done in the morning, and are conducted with everyone on the team. Three simple questions are asked every day for each person on the team to address:

- What did you accomplish yesterday? (This updates everyone on tasks that are completed and shows who met their agreed-on commitments)
- What will you do today? (This updates everyone on tasks planned for the day)
- Are there any blockers or impediments? (This allows for issues to be discussed and/or resolved)

The purpose of the meeting is to gain alignment and clarity on project progress, and it holds everyone accountable for their daily outcomes. You will find that some team members have not carried their weight in the past, and this process exposes any weaknesses in the team. It's a powerful accelerator.

While addressing the three themes of People, Process, and Platform is the focus of your initial transformation, you will also need to put emphasis on a number of additional themes that are essential to complete the process:

- Talent (people)
- Development and release process (process)
- Infrastructure (platform)
- Communication and collaboration
- Innovation
- Speed-dedicated teams
- Application performance
- Incident management

Chapter 5: Commit to Stay the Course

The flywheel has begun—and it's time to accelerate the momentum.

Transformation is not a “once and done” initiative. You must be constantly looking for ways to drive the flywheel forward.

You are not just moving the organization from point A to point B but working to change the culture and complexion of the team so they can adjust as new technology develops, new trends arrive, and the market landscape changes. Our CEO, Brad Smith used to have a saying: “You need to repair the roof while the sun is shining.” If you wait until the rain begins, your task ahead will be messy. When things are going well, that’s the best time to be shoring up what you have and looking for the next innovations and ideas.

Your organization needs to commit to always looking forward and persevering down new avenues.

Encouraging your teams to investigate new innovations and technologies and explore new ways of thinking is how you keep your teams motivated in the organization. As you build this new culture, it is very rewarding to see teams deliver on capabilities they never dreamed possible, all the while gaining the respect of not only their fellow team members but others across the company, as you publicize their successes.

To stay the course and continue to transform your culture, there are three key operational mechanisms I use. These build momentum, keep communication open, and monitor how well we are progressing toward our goals.

- An annual senior staff meeting
- A quarterly extended leadership off -site
- A quarterly all-hands road trip

Chapter 6: Nurture Change

As I have been writing this book, my mind fondly recalls the names, faces, and lives of those people I worked with who truly impressed me with their passion, skill, and approach to everything they did. Many of these people have told me, in the years afterward when we’ve been able to put some time aside to catch up, how much I impacted them, and I often think of how much they impacted me. We did great work together. And, even more, we grew as human beings.

Leading extraordinary change will bring you many rewards that will last a lifetime, but this can only be experienced if you take a very intentional, personal approach to how you lead. I have often repeated the adage, “You hire employees, and people show up.” When you embark on any significant change that affects people, you must do this with enormous care to achieve the results you seek. This is why the final phase in my playbook, Nurture Change, is the most important.

Nurturing change should be integrated in everything you do. It’s the glue that binds everything together. Why? Because when you nurture change it truly changes people, and when people change, the culture of an organization is transformed.

I have three broad categories that reflect the heart and philosophy behind nurturing change, and these will get you started in your thinking about how you can begin to nurture change in your organization. These strategic practices keep me personally connected to the people in my organization and sets them up to succeed. Nurturing change incentivizes people to bring the best work of their lives to the workplace, and that, in turn, contributes the same to the team, with a passion to see the whole organization succeed. The three ways are:

- Recognize people publicly, coach them privately.
- Make the workspace fun.
- Be personal—and listen!

Leading extraordinary change takes a tremendous amount of energy and mental capacity, which can be draining. Your calendar is full, the days are long, you’re persistent in everything you undertake, and there is always more to do. But, as part of modeling the way as a leader, you also need to model how to stay healthy and take appropriate time off.

Taking a break often gets you out of the way so that people can grow and take their own opportunities to the next level. It can be very hard to do when you think you’re indispensable, but you’re not. A true test of leadership is not how things work when you are there but how things work when you are not. As you empower others to take the reins, it begins to establish your successors, which is what I want to address as I close this book.

In the introduction of this book, I outlined how leadership is not about you. While you will enjoy success, influence, and well-deserved awards for your incredibly hard work and long hours, you will need to implement the final phase of transformation to include what happens when you exit the organization. Transitioning your role is not something that happens overnight. Succession planning takes careful consideration.

Giving other leaders the chance to step in when you’re out of the office is crucial in identifying succession candidates. Give over the controls when you recognize leaders have the necessary competency. Take your vacations and give people responsibility. Trust them to do it—and let them shine. Ask for people to step in for you at meetings. When they have a

taste of what you are doing, they will not only respect you more, but you can trust them better.

Conclusion

Keep the gas pedal down in driving momentum in your transformation. People need to be constantly motivated and inspired. But you have to stay the course and keep things fresh, nurturing the change, otherwise you will stagnate—as will your pace of change.

As I've said, when I begin a transformation effort, it usually takes eighteen to twenty-four months to get into a rhythm. Consistency and persistence are key. You will be amazed at what you can achieve in just a few months and how an organization can evolve with the right playbook!

Remember to look for the ingredients for success. If the ingredients are in place, then be gutsy, take risks, and seize opportunity. Don't be swayed when things aren't going quickly enough. Be tough and persistent.

But most of all, enjoy the journey!



Marilyn (Mamie) Jones is a consultant, speaker, author, and former SVP executive. Her thirty-five-year corporate journey has been marked by outstanding achievement and transformative influence. Mamie has held numerous senior leadership positions at notable organizations including Sabre, Travelocity, and Dun & Bradstreet, culminating her formal career at Intuit. For her thoughtful and dedicated leadership, Mamie has won numerous awards including the Tech Titan CTO award for North Texas and the coveted CEO Leadership award at Intuit.

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