



Advisory Services

Strategic Leadership | Organizational Renewal



jamesdillon.org

Strategy and Organizational Consulting Services

We help executives produce the change, innovation, and profitability demanded by their positions. Our common-sense approach to raising performance is founded on broad experience and infused with deep research expertise. We combine an intimate knowledge of cutting-edge management research with years of experience helping executives resolve their most challenging dilemmas.

Our consulting projects meld three “insight ingredients” – expert knowledge, penetrating analysis, and process leadership – in unique proportions to strengthen your foundation for future performance. We help clients lead a process to bring strategic clarity and unified action to their executive team and the whole organization. We’ll design a customized service that precisely blends the ingredients you need to close the gap between current performance and your potential.

You may need to capture new market opportunities, kick-start growth in a lethargic culture, raise the bar on innovation, or bring profitability back to a sagging P&L. These achievements occur only when three business elements flow together perfectly: leadership, organization, and strategy.

Bringing insights from experience and research, we’ll join you in a robust process to help you understand where you are now, see clearly where you need to go, and determine how you are going to get there. We’ll meet you where you need help most, whether it’s recharting strategy, aligning the organization, improving leadership –or all of the above.



Our services are focused in 3 areas to lift your strategy, your organization, and your top team to the next level:



1

Clarifying Strategy | Capture New Growth Opportunities and Improve Competitive Positioning

How can we accelerate growth? Which growth opportunities are most attractive for our capabilities? How can we best compete in these spaces? These questions go beyond choice of industry or customer market.

With our expertise in strategy consulting and research, we'll work with your team to understand and overcome the essential risks in your strategic environment – competitive dynamics, business model innovations, disruptive technologies, falling prices, uncertain

Case | Translating a start-up's radical new technology from the lab into product, market, and business-model choices.

During 16 months, we advised the founders of an entrepreneurial venture on key business-model decisions as they evolved and tested their new technology in the medical-imaging space. We provided detailed analysis and strategic-decision support for competitive product-positioning, customer needs analysis, and long-term product-development pathway. We recommended innovative ways to position the technology to launch quickly while averting intellectual property challenges, and without drawing a competitive response from global players.

investments. We combine incisive data collection and analytics with expertly facilitated interviews or leadership sessions to elicit and synthesize dispersed insights from around the company.

The best strategies begin with the customer offering. We'll determine the true needs you're meeting for customers (often surprisingly different from what you thought!) and how to adjust your product or service – even your entire business model – to speak directly to that need. Companies that design products and services tightly around

customer needs enjoy reduced marketing and sales expenditures, and greater organizational alignment around a laser-focused strategy.

Together, we'll chart a course to strengthen profitability and fuel growth for your firm.

Case | Development and launch of a growth strategy for a commercial-insurance business.

In close collaboration with clients, we developed a growth strategy for a division of a \$7B insurance firm. Analysis included researching and modeling the global market for a new innovation (a multinational property-and-casualty insurance product); analyzing the client's prospecting system to profile customer base and assign dollar values to account-rounding opportunities. We advised 4 subsequent analytical teams working to regionalize the analysis for targeted geographies. We led client working sessions and helped prepare presentations to the board, successfully securing a large capital investment in this project. We stayed on to support implementation of the growth strategy, resolving conflicting goals and agendas among client implementation teams, and helping to reallocate resources in the face of new corporate budgetary constraints during the economic downturn, and securing the growth and returns as forecast.

2

Delivering Results | Align the Organization to Hit Strategic Objectives

An organization isn't good or bad — it's good at something (and bad at nearly everything else). Consider: Goldman Sach's equity-trading arm would probably be ineffective at private-equity investment. The group's size, people, work routines, and organization are ill-suited to a related business that in fact operates quite differently.

Every business unit or department is finely tuned to do one thing well. The trouble comes when it's not what the strategy dictates.

We provide an expert framework, custom analysis, and a collaborative process to sharpen your internal organizational alignment and enhance fit with your strategic objectives. We bring time-tested techniques with deep research-based expertise in the dynamics of organizations. We understand the cross-level interactions between teams, individuals, and organizations, and the challenges of collaborating across boundaries and levels of hierarchy. And we'll help you diagnose and resolve problems before they grow bigger.

Whether it requires fine-tuning the organization or leading a major change effort, we have the tools and concepts to enable excellent results. You'll find your strategy is executed with greater speed and precision than without organizational alignment.

Case | Redesign of the front-office organization at a major energy-trading business.

The unit had struggled for two years to resolve internal inefficiencies while reaching for new growth areas. We led the management team through a detailed analytical process to identify sources of delays and handoffs within the organization, and diagnose why innovation goals were not being achieved. Together we worked to reformulate its organizational architecture to align with the parent company's shift from an asset-heavy utility to an agile energy merchant. This helped the management board of the business unit convince its parent of the key role it could play in exploiting Europe's evolving energy markets.

Case | Redesign of the marketing and sales organization at a global pharmaceutical firm.

The firm's marketing organization had evolved organically as its product portfolio grew over a decade, but new at this scale the interfaces and hand-offs between groups had become stifling. In collaboration with client employees and under the direct sponsorship of the CEO, we began by conducting interviews to map internal marketing processes and identify symptoms and root causes of process difficulties. Our team worked with the client to generate and test potential solutions to problems. The client successfully adopted our recommendations for a significant redesign, improving efficiencies and coordination between product lines. (Even four years later, the CEO told us that the new organizational design produced far greater coordination and innovative efforts, the results of which were still impressive.) The client later replicated our analytic process in the R&D side of the business, also resulting in more focused outputs.



Building Agility | Ensure Future Strategic Responsiveness

Strategic agility begins with the top team. We'll help you master the disciplines that make good executive teams great, while revitalizing leadership throughout the organization.

The trouble with shifts in the strategic environment is they don't follow your annual planning process. Relentless competitive and technological change demands ongoing engagement on both strategy and execution. We'll teach you to approach strategy as a continuous process that ties closely to organizational and resource-allocation decisions throughout the year. You'll develop a capability for ongoing strategic evolution so your team is ready for nimble response to shifting customers and competitive environments.

Achieving success now and in the changing future can be designed into your management processes and your organization.

We help leaders build excellent teams and extend their influence through the organization using thoughtful process design. We combine insights from cutting-edge management research at Harvard Business School with years of experience advising companies in dynamic environments. You'll learn nimble, agile practices for staying abreast of strategic and technological change, discovering and capturing new market or product opportunities.

Using the toolkit developed in our research, we'll redesign work processes to capture the full force of your firm's collective experience—spending less time for more strategic insight, while injecting clarity, energy, and flexibility into the executive team's work.

As an expert on strategic leadership and top-team effectiveness, James Dillon collaborates closely with CEOs and their teams to (1) unravel the roots of their most vexing challenges, (2) catalyze the top team around a plan for renewal, (3) design and manage an adaptive strategy process, and (4) set in place the organizational conditions that enable focused execution and agile response to change.

Thought Leadership | Expert insights from the Top Teams Study at Harvard Business School.

James Dillon is the lead researcher in the Top Teams Study at Harvard Business School, a multi-year study of effective strategic leadership and team-based organizing at the top of medium- and large-sized organizations. Working from detailed interviews and surveys of CEOs and executive teams of major multinationals, the study has examined strategy-formation processes in a wide variety of industries and company sizes. Its conclusions reveal which leadership practices foster strategic adaptation in organizations — and which inhibit it. From carefully selected meeting processes to the use of “episodic strategy teams”, successful leaders employ a distinct set of tools to impose discipline on an unwieldy stream of strategic issues. The study reveals how the best leaders harness the power of teams, while avoiding their hazards, to create an adaptive strategy process with superior innovation and competitive outcomes.



Engagement Models | Common Ways to Work with Us

The following are typical models for our engagements. In most cases, clients choose a customized combination of these to best suit their needs.

Facilitated Offsites | Guided group sessions to work through difficult decisions & move toward agreement and joint action

Offsite meetings with small or large groups use structured, guided sessions to move major decisions toward action. Expert facilitation, combined with pre-work and analytical frameworks, can open the group to fresh perspectives, renew collaboration, or even break a decision impasse.

When participants are involved in the hands-on work of decision making, they are more likely to make changes.

We work with you to custom-design a meeting agenda and facilitation process to move participants toward agreement on the key issues and their causes, generating a common frame of understanding and ultimately greater consensus.

Offsites typically include one or more of our Exec Ed Briefings™ to bring fresh leadership-research insights or to teach analytical frameworks used in the workshop.

Individual Consultation | The expertise of a consultant, packaged in 1-on-1 coaching sessions

Sometimes it's easier to make progress on tough problems in a private session, where it's more natural to address confidential strategic topics, game-plan a key board meeting, or work on your own influence and leadership style.

We'll meet personally to resolve your most pressing challenges with complete confidentiality. Individual consultation is powerful alone or as a complement to group offsites.

Keynote & Workshops | Leadership insights from research and practice in a concise, thought-provoking format

Engaging keynotes bring our exclusive blend of research and practice to topics like leading innovation, getting the best from your executive team, and developing high-potential leaders.

Executive-Team Acceleration | Launch or relaunch your team's processes and vision

Bring out the best in your senior team and extend their influence through the organization using the toolkit and routines discovered in the Top Teams Study at Harvard. Together, we'll agree on a clear purpose and vision for your team and then custom-design team work processes to manage the diverse issues you face. As a result, you'll spend less time for more strategic insight, while enjoying greater clarity, energy, and flexibility in your team's work.

Our Executive-Team Acceleration begins with a full-day training/acceleration program for your executive team. Then, to enable real change, we follow up with twice-monthly executive coaching for each member of the team, usually for 3 months. The coaching will support each executive in translating and applying material from the Acceleration session into their routine work of execution and strategy. Follow up sessions with the full team can be added as needed.

James Dillon is a leading advisor to executive teams on strategy and organization. He is the principal author of the Top Teams Study at Harvard Business School and is a leading authority on executive-team dynamics and decision-making effectiveness.



Mr. Dillon honed his strategic abilities as a strategy consultant at Monitor Group (Michael Porter's strategy consultancy); then as a student of Clayton Christensen (Innovator's Dilemma) and Amy Edmondson (Teaming) who jointly advised his doctoral work on strategic and organizational dynamics in executive teams.

An independent consultant since 2005, Mr. Dillon partners with senior leaders to transform organizations and engender agile strategies in the face of shifting technologies and competitive markets. He is the principal member of a network of highly experienced consultants, from which he hand-selects a bespoke team of advisors for each engagement.

He has consulted to firms in diverse industries, including software, finance, publishing, education, energy, telecomm, pharmaceuticals, healthcare, and logistics. He maintains research relationships with executives in the manufacturing, consulting, telecomm, and medical-devices sectors.

Mr. Dillon previously taught at Harvard College, where he designed and led a course on organizational change. As an expert advisor, he helped redesign an HBS executive education program to help participants translate classroom material into real change in their organizations. He reserves time each year to coach high-potential managers in Harvard's Program for Leadership Development and senior executives in the Advanced Management Program.

His research and consulting are devoted to helping executives lead change through inspired design of teams, organizations, and strategic processes.

Mr. Dillon holds the BS in accounting from Brigham Young University, the AM and EdM in psychology from Harvard, and is near completion of the PhD in organizational behavior at Harvard Business School.