Editor's Eye on Baltimore: Alignment - A Conversation with David Lunken, Senior Consultant, PI Midlantic

By: Newt Fowler
Organizational development... Right up there in the pantheon with legal insight and management consulting... Yet I found how **David Lunken** approaches building winning teams both fascinating and sobering. He efficiently focuses on what matters, but David also recognizes how hard it is to truly reset the game. And he does it with the answers to four questions.

The Skinny. PI Midlantic is a consultancy that assists organizations to understand how to better motivate, lead and utilize their management teams and to align them with business goals.

The Four Questions. David Lunken wants teams to succeed. So do most organizational development sorts. So, I wanted to understand how David does this differently than the myriad of other OD consultants out there. I asked David to describe what he does. He answered by walking through the **four questions** he asks his clients:

· What are you trying to accomplish?
· How will you know when you get there?
· What is the "personality" for each job?
· How do you "wire" the entire team to get there?

By working through these questions, David believes an organization will have a better understanding of its business goal and can ensure the right people are in place to get there.

Mind the Gap. Improving efficiency isn't always about figuring out where you want to end up. Most entrepreneurs David works with "are really smart people asking really good questions" and have a clear sense of where they would like to lead the organization. The challenge is understanding whether the leading question - the one that shapes an organization - has really been answered in terms of the **team that's required to succeed** and the effect when that team isn't designed correctly. Answering "what are you trying to accomplish," really involves understanding not what is the goal, but what is in the way of that goal. And for David, that focus should primarily be on the team. Do you have "**the right people in the right roles** in the right environment to get to the right results?" Sounds clever enough - it's easy to repeat, but David describes this process as one of finding the **talent gaps** you're trying to close, the talent deficits that are impeding an organization's ability to achieve its goals. David also describes it as a process that forces some fairly frank self-examination.

Pick Three. You have a job unfilled and you need someone it that seat now. It is difficult but critical to **think past a job description** for any given role - to tune into exactly what you expect from someone in that role - what results do you expect? In David's mind, that means not to make that hire prematurely. How do you ensure that those results you

expect from that job are **measurable**? Even if they are measurable, are they **realistically attainable**? And, more importantly, are these **results timely and relevant** to the organization's goals? In David's views, the key to focusing on the talent needed in the gaps is to understand "how you're going to measure [performance]." This is the operational way to think about David's second question: "how will you know when you get there?" How you measure "has to be as objective as possible." For David, if an entrepreneur "does nothing else with respect to any role in his organization, it is to answer what are the **three things expected of any given role**." If an employee did nothing else but those three things, they should be successful in that role; the rest shouldn't matter. But you have to get the three things right...

Personality of the Job. The third question, focused on each defined role in the organization (from the second question), is to take a step back from the person who might be in that job and focus on the "**personality of the job**." I struggled... So, David indicates that you should take the three results you expect in any given role (step two) and then design the personality required to achieve those results. I asked for examples, so he answered with a series of questions. "Is it a **command and control** job requiring ownership?" "Is it **heads up or heads down**?" "Is it **analytical or social**, one that involves people?" Does the job "drive process or is [it] driven by process?" This process of determining the personality of each job should be done "without a filter" from the team in place, that is without trying to gauge it from the personality of who might be sitting in the chair today. David suggests that this exercise of defining the various personalities required throughout an organization should be undertaken by more than one person, to ensure that the **personality profile** of the position is as well thought through as possible.

Wiring the Team. The fourth of David's questions returns the focus to **team dynamics**. One has to start first with understanding the business goal, then determine the roles needed to get there. Concomitant with the roles is the need to understand the personalities required to succeed. Only then, for David, can you turn your focus to the team itself. "You can't do the [team] wiring in a vacuum; it decreases the probability of success." And it is pretty clear that if you're trying to backfill the process by **rationalizing the relevancy of existing employees** into these roles, you're wasting your time. If you're truly committed to building a team that can succeed, then you have to be willing to see clearly whether the right people are currently in the right roles. This doesn't mean that someone must go; but it does mean that each person's skills and personality should be tested against their current job and, most importantly, other jobs that have been defined. One of David's more curious comments to me was his continuing discovery of **great people mismatched with positions**, where the result was often achieved by moving people among chairs as opposed to throwing them out. This last step requires understanding how the people on a team will fit in with each other, both who may already be there and who may be needed - ensuring that the collective roles mesh and understanding how the personalities of each of those jobs will perform together.

The Take Away. When you start thinking about an organization in transition, it makes the task that David outlined more challenging. How does an entrepreneur reset the course for an organization, redefine the roles required for that changed direction,

assess the personalities that not only adapt to, but embrace change, and get it all right, without losing steam or talent... When I pressed David on such a set of dynamics, he paused. "If you are willing to navigate change, then you need [to accept] the conflict that comes with it." David reflects that most organizations struggling with change often risk drifting into "group think". I share David's belief that if you see fundamental change as the only course to survival, then you don't let the inertia of yesterday slow you down. If it means resetting a team because its current DNA simply won't get you there, while it's a painful decision, it may be the right one.

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For comments about this article or thoughts on future conversations, let me know at: nfowler@rosenbergmartin.com

With more than 25 years experience in law and business, **Newt Fowler** advises many of the Greater Baltimore region's entrepreneurs and technology companies, guiding them through all aspects of business planning, technology commercialization, and M&A and financing transactions.