

# Introduction

There are too many books that *talk* about innovation, collaboration, and culture creation without actually teaching—how to lead it, staff it, manage it, and inspire it. This book fills this gap. This book, and the method it is based on, is the fruit of 14 years of my experience leading more than 230 multidisciplinary, multicultural, intergenerational teams on a 4-month innovation journey—from business problem to viable solution. However, as much as my method is for leading and managing collaboration and innovation in professional services,<sup>1</sup> it also helps leaders drive change, client-centricity, and culture creation.

This book provides practical recommendations to enhance leadership style and develop the right climate, team structure, and processes so that a culture of creativity, collaboration, and innovation can thrive. It also unpacks why collaboration and innovation efforts in professional services so often do not succeed. Given that more than 75 percent of all change management initiatives fail in corporations,<sup>2</sup> understanding these failures is critical to any hope of success. In my experience leading multidisciplinary collaboration efforts and innovation journeys within professional service firms and corporate legal departments, I have repeatedly witnessed three failures, by leaders, that contribute to the efforts' demise.

The first is a failure on the part of the leader to truly understand what mindset, skills, and behaviors (beyond expertise and collegiality) are required to collaborate and innovate on multidisciplinary teams and *delight* clients and other key stakeholders. Therefore, Part I of this book begins by exploring the new priorities and demands of corporate clients and the leadership gap that exists in professional services. It then identifies the new expectations of professional service providers, explores what is (and what is not) client-centricity and highlights the importance of adaptive, inclusive leadership (which includes leading and following others). It concludes by arguing that the new value equation in professional services is learning how to collaboratively problem-solve on multidisciplinary teams the way that innovators and design thinkers (and adaptive, inclusive leaders) do.

The second common pitfall is a failure by the leader to focus on further developing their own leadership skills and undertaking the hard facets of culture creation. Therefore, Part II identifies what it takes of *you*, the leader, to inspire, lead, and create a culture that embraces collaboration, innovation, and change. It identifies the Three Rules of Engagement

that can help leaders meet the changing expectations, lead collaborative initiatives, and transform relationships with internal or external clients and stakeholders. Then, it spells out the recipe (and emphasizes the tough work that is required) to create inclusive environments where diverse professionals can thrive—because there’s nothing soft about culture creation.

The third failure is neglecting to actively *manage* innovation or change efforts. Collaborative initiatives (whether geared toward innovation or cross-industry practices within an organization) do not happen on their own. Without the right management, they are doomed. To this end, Part III unpacks what needs to be managed in any collaboration or innovation effort, including how to create effective multidisciplinary teams that are set up to—and actually do—collaborate in the “right way.” This involves paying attention not only to behavior but also team makeup, structure, and processes. It also requires the employment of a calculated preplanned method to move a team from a broad challenge or opportunity to a discrete initiative that adds real value—along with a communication strategy. Therefore, in addition to unpacking how a marketing and measurement plan should be developed to secure buy-in internally, Part III provides an overview of The 3-4-5 Method™ I created (and refined over the past decade), demonstrating why it works and why professional service providers need a method like this one that is geared toward their ways of working. Instead of being all about embracing messiness and failure, my method focuses on step-by-step progress and ensures that the only failure that occurs is the competent (vs incompetent) kind. There are two complements to this book. First, there is a handbook that goes with it: *The Leader Upheaval Handbook: Lead Teams on an Innovation and Collaboration journey with The 3-4-5 Method™* that includes week-by-week instructions, exercises, checklists, and timelines that have been used successfully on hundreds of diverse teams to inspire, lead, and manage collaboration, innovation, and culture change within professional services. Second, my prior book, *Legal Upheaval*, provides some similar content in more detail and with a focus on legal professionals specifically.

This book, however, is for anyone who yearns for more successful multidisciplinary collaboration in professional services. This book is for anyone invested in transforming how professional service providers provide service to clients. This book is for anyone who is searching for concrete ways to lead and inspire change, culture creation, and client-centricity among their teams, firms, or departments. If you’ve gotten this far in this introduction, then this book is likely for you.