



Managing Intent

Delivering on Promises and Achieving Full Realization

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NGOs and nonprofit organizations are experiencing a period of enormous challenge within their external environment. The need for their critical services continues to grow, while the resources available to meet these increasing demands are often inadequate. Moreover, the conditions within which some of these organizations deliver their services have never been more fraught with risk and difficulty. In order to adapt to (and in some cases survive) these circumstances, many organizations across civil society are making significant changes. Some of these changes are transformational in nature and must be fully realized for these organizations to continue delivering the impact that the world so sorely needs.

Experience tells us that only three in ten strategic change initiatives succeed in fully accomplishing what they set out to do. Senior leadership usually responds to such outcomes with surprise, disappointment, and anxiety. Often, they cannot put their finger on where the initiative went wrong; they just know it didn't fully achieve what they had originally envisioned.

There are many factors that can contribute to initiatives falling short of their objectives, but one of the most persistent is the lack of focused attention on intent. Oftentimes, leaders fail: 1) to specify the true purpose behind the entire endeavor early in the process, 2) to express this purpose in such a way that it can be understood and well executed, 3) to enroll people in a collective commitment to achieve this purpose, and/or 4) to rigorously protect the integrity of the change's intent throughout implementation.

In this paper, we describe "intent management" as a discipline that can be the difference between celebrating change success and falling short of the desired outcomes. Intent management keeps an initiative from becoming another disheartening statistic by shifting the focus from installation (putting a solution in place) to realization (achieving its ultimate purpose). By deliberately managing the intent of a change rather than leaving it to chance, an organization is much more likely to deliver on its promises and avoid disappointments.

Strategic initiatives are, by nature, complex undertakings. They involve and affect many people. They may take months, or even years, to realize. They usually include new ideas, concepts, or practices. And most often, strategic initiatives are conceived by a few people (typically senior leaders) but cannot be brought to fruition without the involvement of large and often diverse teams. More often than not, however, a gap develops between the outcomes that were originally envisioned by the sponsors of the initiatives and the end results produced by these teams.

Unfortunately, the results of most key initiatives fall into one of three categories:

- Under-delivered: Yielding less than the intended results
- Over-delivered: Achieving more than the intended results—frequently with time and cost implications that prove too expensive to sustain
- Unrecognizable: Bearing little resemblance to the original goals

When outcomes like these occur, it is common to hear senior leaders make statements like:

“That’s not what we thought it would look like.”

“The vision was great, but somewhere on the journey we lost our way.”

“I can’t put my finger on it, but I don’t think they got it.”

“How did it get from what we approved to what we’ve got now?”

“It has the appearance of what we wanted, but somehow the essence of what we were really after just isn’t there.”

SYMPTOMS OF POOR OR ABSENT INTENT MANAGEMENT

The practices required to prevent gaps between expectations and outcomes from arising in the first place are collectively called **intent management**. In this context, **intent** is the *true purpose* behind why a change is being pursued. **Management** of that intent requires *specifying it, expressing it, enrolling people in supporting it, and protecting its integrity*. In combination, intent management forms an irreplaceable tool for fully realizing the change initiatives leaders pursue. Yet it is often neglected.

Indicators that intent has been poorly managed or that realization has been left to chance include:

- **Lack of relevance:** The primary purpose of the change has been stated in such a way that the initiative appears to be unrelated to what is important to those who are the focus of the change.
- **Overly complex:** Leadership's aspirations and expectations have been conveyed in a way that makes the desired outcome unclear or that allows multiple interpretations. The stated intent may contain what many refer to as "consultant speak" and others call "gobbledygook;" perhaps it is understandable to those who created it, but it is hazy at best to the people who are required to execute it. Another factor that can add to complexity is when guidance is expressed in such detail and length that it becomes overwhelming. Such intricacy limits the target audience's ability to focus on the right things at the right time. The result? An inability to see the forest for the trees and, consequently, muddled execution.
- **Inaccurate retelling:** With any change initiative, the intent will undergo a series of retellings—level to level, person to person. We liken it to the game of "telephone" many of us played as kids, in which each player repeats a phrase in the ear of the next person one by one down a line. By the time the message is said aloud by the person at the end of the line, it no longer matches the original phrase. Even a 5 percent error or omission in a retelling can cause a multiplier effect—a distortion of a distortion—that reproduces and radically changes the original intent.

- **Lack of internalization:** People don't make the intent their own by merely linking their actions with the new direction. While this sort of alignment is necessary, it is insufficient for change to fully take root. People can behave publicly in ways that are consistent with the intent of an endeavor while their beliefs and private behaviors do not change and, therefore, are not consistent with the true purpose of the endeavor. The upshot is that the apparent behavioral changes are often fragile and short-lived since they are not built on a true shift in beliefs and mindsets.
- **Compounded compromises:** Concession-making and tradeoffs are inherent in the successful execution of major change. Some compromises are necessary and justified, but piling on too many can bring down an initiative. In the case of poor intent management, it's death by a thousand good yet misguided decisions. Every key decision along the way must be evaluated not only on its individual merits, but also against the overall intent.

INSTALLATION VERSUS REALIZATION

Mismanagement of a particular change intent will most likely not yield all these symptoms, but the presence of even a single one can significantly undermine the sponsor's realization goals. Often in these cases, *installation* occurs, but not *realization*. In other words, something is put into place, but that "something" doesn't attain what was desired.

All change efforts go through installation as a phase. During this period, attention focuses primarily on the physical insertion of solutions into the work environment. This is when initiatives are announced and placed, any needed support is provided, and people are trained. Whether engaging new organizational structures, establishing new roles and responsibilities, or instituting new policies and procedures, major change endeavors must be installed before anything else can happen.

The work of change installation is practical, tangible, and task-oriented. It's about ensuring things are "up and running." A common example is the introduction of new software: Installation involves acquiring it, customizing it, plugging it in, and teaching people how to use it.

Reaching *realization*, however, means the organization’s anticipated impact has been actually attained. The value of the software is only *realized* when people are using it as it was envisioned and when the true intent behind making it available—such as improving collaboration between remote teams or reducing the need to manually capture compliance data—has been accomplished.

To achieve realization, people must demonstrate the sought-after outcomes and sustain them over the appropriate amount of time. For this reason, intent management must take into account not only objective goals, but also the subjective experience—the “taste, feel, and smell” of the solution’s desired effect. When intent management is successful, *mindsets* and *behaviors* converge and persist over time to produce the called-for result.

INTENT MANAGEMENT: DEFINITION

Intent management involves specifying the purpose of the change, expressing it, enrolling others, and protecting its integrity from the launch of the initiative through installation to full realization of the change.

To deliver on the promises of an initiative, we must be able to draw a line from intent to realized outcome. This *line of sight* for intent management connects *specifying* to *expressing* to *enrolling* to *protecting the integrity* of the intent of the change.

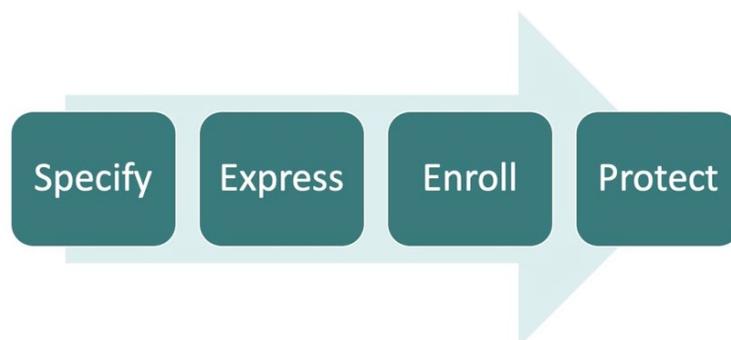


Figure 1. Line of sight for intent management

Intent **specificity** is our starting point. Specifying the intent of a change effort means starting with the end in mind. It is an explicit understanding of the desired end state. Questions often asked in the process of specifying intent are “How will we judge success when we are finished?” and “What will we look for in the result that will make us proud of the effort?” The challenge is that this level of specificity must be achieved not just by an individual, but collectively by the entire leadership team that is sponsoring the initiative. It is surprising how often a senior team can sit around a table, agree to fund an initiative, and be in apparent agreement on the initiative, yet each member of the team sees it differently. To be successful, the team must develop a shared understanding of and commitment to exactly what the intent entails.

The second ingredient in intent management is **expression**: the ability to articulate the intent to all who need to participate in its realization. Few strategic initiatives can be realized through the work of the leaders alone; therefore, once the intent is clear and unambiguous within the leadership team, it must be imparted to others. Everyone involved needs sufficient understanding to allow them to advance forward with their respective part of the process. Without understanding the sponsor’s vision, the implementation team will either be constantly guessing what the leaders really wanted or continually returning to ask questions. The former will inevitably lead to an unsuccessful result. The latter leads to frustration on both sides, as well as delays. Therefore, successful expression of the intent is imperative.

The vehicle for an effective expression of intent is a complete, concise, clear, and compelling declaration of the expectations for an initiative. A robust statement of intent is:

- complete so that the full understanding of what will be delivered is in one place
- concise so that everyone can be aware of the intent at all times; once the intent becomes too complex for people to remember, their decisions will begin to diverge from it
- clear so that it can be easily communicated to and understood by all involved in executing the change

- compelling so that people relate to it at a personal level and are mobilized into action

A statement that meets these criteria is like a promise. And promises can be powerful forces when they are seen as relevant and likely to come true. People either become excited that an alluring opportunity will unfold, or they become hopeful that a troubling problem will be resolved.

This promise is made by the leaders who initiate and sponsor a change. Their statement of intent describes what they expect. It must drive the initiative, guide decisions, and answer questions. It must be understood and upheld by the leaders themselves, by those involved in implementing the initiative as well as all who are affected by its impact.

Consequently, creating an effective statement of intent is much more than the executives agreeing on the text to use to convey it. The words are merely a starting point for the senior team to connect with the true purpose at a much deeper level. Ultimately, they must *commit* to the intent. That commitment requires moving from words to shared meaning and then believing in the possibility created; aligning with that vision as a team; committing resources to it; and, most importantly, staking their reputation on delivering on the intent.

All of these things—words, meaning, belief, alignment, and commitment—must exist in parallel. The *words* are the language used to articulate what realization of the desired outcome looks like. The *meaning* is how people interpret those words. *Belief* refers to how plausible the endeavor is perceived to be, given the human and financial resources available. *Alignment* is the visible political stance taken in support of the words, meaning, and credibility applied to the desired outcome. Finally, *commitment* requires that people's internal belief and overt actions reflect an imperative to attain the true purpose of the initiative—not just its installed appearance.

Is intent a constraint that can cause frustration for implementation teams? In a way, it does serve a limiting function in that expectations are being channeled in a specific direction which, of course, means other prospects aren't being pursued. When used appropriately, however, intent enables large teams to engage in executing major changes, to leverage their creativity and innovation, and to have confidence that they will produce the expected results.

Without clear intent, the implementation team and those the change is designed to impact are constantly trying to guess what the leadership team had in mind. Even when people guess correctly (which they do about once in every three decisions),¹ the lack of clarity creates an environment of insecurity and wasted resources. Now that's a reason to be frustrated.

The U.S. Marines use the concept of intent to guide troops in achieving the goals set by the commander in what is called “the fog of war.” Marines believe that guiding with intent promotes independence and improvisation required on the battlefield. In civil society organizations, similar dynamics are often in play. For instance, in humanitarian crises, the realities on the ground can change literally from moment to moment, requiring those in the field to be agile and resourceful in how they address the issues they are facing. A clear statement of intent allows teams in those situations to act quickly and with the confidence that they are staying faithful to the ultimate purpose of their mission while simultaneously addressing the unique needs of the moment.

Equipped with a well-crafted statement of intent, the third element of intent management is for leaders to implement an **enrollment process**. In other words, a set of activities must be designed to promote a shared understanding of, commitment to, and alignment around the successful execution of the change among all the individuals and constituencies who will be involved with or affected by the change. The intent statement may require tailoring to each affected group to ensure it is understandable and relevant in the group's specific context. This requires providing a clear view of how their work is linked to and supportive of successful realization of the intent. The enrollment activities should be designed to also encourage candid conversations between leaders and participants to surface any questions or concerns that need to be addressed.

One NGO accomplished this enrollment across their international federation by conducting a series of conversations between leaders at all levels and their teams over an 18-month period. Each round of these conversations started at the top of the respective country organization and cascaded from senior leadership to the front line. Each leader–team dialogue was designed to focus on just one key

¹ From *Sources of Power: How People Make Decisions* by Gary Klein (The MIT Press, Boston 1998)

element of the organization's sweeping new strategy. In these discussions, leaders created space for staff to explore the implications of the new strategy for their work at the local level and to raise their questions, concerns, and ideas for successful implementation. The information from each round of conversations was then fed back to the senior leader of the federation for their consideration during implementation of the strategy. This organization used employee engagement surveys to assess the extent to which the required changes were well understood and acted upon. As a result of these surveys, it quickly became apparent to executive leadership which teams were fully engaged with the strategy and which teams were going to require additional attention if the strategic intent was to be broadly embraced and achieved.

The upshot of this rigorous enrollment effort was that the intent of the new strategy was now understood at multiple levels—i.e., national, local, and personal. It no longer remained an abstract statement of required changes issued by executives thousands of miles away. Through these discussions across the federation, leaders and their teams had the opportunity to understand and commit to the new strategy in terms that were salient to their particular roles and unique circumstances.

The fourth component of intent management is ***protecting its integrity***. The intent that is now clear, expressed, and understood must be managed so that it stays true to its purpose.

Between vision and reality there are hundreds and even thousands of decisions that must be made. Each decision has the potential to bring the desired result into sharper focus or to blur it. Protecting the integrity of intent means ensuring that each choice is in line with the true objective of the overall effort. This seems obvious, but with the multitude of pressures that inevitably influence execution—namely time, resources, and funding—the ultimate intent can easily become lost in the decisions being made.

A change project will almost always have someone watching the time and often someone else watching the spending, but rarely is anyone charged with guarding the vision. Yet the vision is arguably the most crucial element to preserve. And no, this can't "all be handled by the project manager."

Experience has shown that there is always tension affecting the interplay of time, funding, and vision. The first two deal with installation and the last with realization. Most project managers are focused and rewarded based on installation metrics. Therefore, more and more organizations are assigning a separate role of “intent architect,” whose responsibility is to maintain tight vigilance on the integrity of the sponsor’s promise. This person doesn’t usually have the authority to take any corrective action, but he/she is expected to alert the appropriate leader(s) if/when integrity erodes beyond certain thresholds so the leader can do what is required to mitigate the threat to full intent realization.

While the four elements of intent management described above cannot in and of themselves guarantee full realization of a particular change effort, attention to each of them will significantly help mitigate a host of risks that can threaten an endeavor from its conception.

INTENT MANAGEMENT: THE BOTTOM LINE

In these disruptive times, NGOs and nonprofits around the globe are investing significant time, money, and energy on strategic, much-needed initiatives. The evidence is clear that, if pursued via traditional planning and delivery approaches, these initiatives do not have a great chance at fulfilling their aspirations. Lack of specificity about the intent of these initiatives, poor expression of the intent, insufficient enrollment activities, and inadequate protection of integrity all contribute to the failures. It doesn’t have to be that way.

For leaders, the cost of mismanaging intent is more than the time, energy, and money invested. A promise is made—to the board, to donors, to staff, and ultimately to beneficiaries—when funding for the project is secured. The leader’s reputation (as well as that of their institution) is on the line. Explicit and deliberate management of intent not only avoids disappointment, but it also builds trust and confidence in the leader and the organization. And, most importantly, it provides the critical starting point for transformational results.

Conner Advisory will continue to monitor and study the factors that are aiding or impeding the progress of INGO leaders and their organizations as they adapt to—and hopefully thrive in—this unprecedented environment of change and disruption. We invite you to download our other research papers and follow our future insights on our website, conneradvisory.com.

ABOUT THE AUTHORS

Daryl Conner

Daryl is co-founder and Chairman of Conner Advisory, a consulting firm providing change execution support to civil society organizations who are advancing the quality of the human experience and who find themselves facing transformations beyond their capacity to successfully execute. Conner Advisory serves INGO and non-profit leaders addressing some of the world's most intractable and critical challenges of our day, including homelessness, hunger, medical crises, and healthcare. Representative clients include: Habitat for Humanity, Doctors without Borders, Pact, and YWCA.

During his 45-plus years of practice, Daryl has educated and advised strategic leaders and seasoned change practitioners in many of the world's most successful organizations. His focus has always been on helping them both understand and address the challenges and opportunities they face during transformational change.

Daryl's work is built on a strong foundation of research, extensive consulting experience, and a master's degree in psychology. He has authored two books—*Managing at the Speed of Change* (Random House, 1993) and *Leading at the Edge of Chaos* (John Wiley & Sons, 1998)—and more than 250 publications, including journal and magazine articles, monographs, book chapters, and videos. In recent years, his newer published work has been made available through blogs, essays, and white papers ([Advisory Research](#), [Raising Your Game Blog](#), [Essays on the Mastery Path](#), and [Change Thinking](#)).

Ed Boswell

With over 30 years of experience helping senior leadership teams around the globe execute major organizational changes, Ed became a founding partner in 2014 of Conner Advisory—a firm focused solely on helping leaders in civil society execute their most urgent strategic priorities.

A recognized leader in the field of transformational change, Ed is a frequent speaker on issues relating to leadership and strategy execution with organizations such as InterAction (Washington, DC) and the International Civil Society Centre (Berlin). He has advised leaders across the international NGO sector including World Vision, Medicins San Frontieres, Plan International, World YWCA, ChildFund International, BRAC, and Islamic Relief Worldwide.

Prior to co-founding Conner Advisory, Ed served eight years as CEO of The Forum Corporation—a global leadership development and strategy execution firm. During his tenure there, Ed co-authored *Strategic Speed: Mobilize People, Accelerate Execution* (Harvard Business Review Press, June 2010), which provides a blueprint for leaders who are executing transformational change in their organizations. He was subsequently elected as a partner at PricewaterhouseCoopers where he led their People and Change consulting practice.

Ed earned his PhD in Psychology at the University of Pennsylvania and serves as an advisor to the NeuroLeadership Institute—an international organization that applies the insights of brain science to organizational performance and leadership effectiveness.

