

**GARDNER&CO.**

# SMARTER COLLABORATION PILOTS:

## PIVOTING TO ACTION AND RESULTS

This white paper explores how pilot programs can be used as a critical first step in helping professional services firms execute their smarter collaboration strategy and sustain it to achieve top goals. It is based on Gardner & Co.'s experience with dozens of high-caliber firms around the world, along with supporting empirical research.

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## Smarter Collaboration Pilots: Pivoting to Actions and Results

Getting people excited about smarter collaboration is one thing—implementing it for the long haul is another. Our 20-plus years working with high-caliber professional services organizations has surfaced and reinforced a proven solution: **smarter collaboration pilot** programs.

Pilots are small-scale, short-term experiments. They test customized approaches for supercharging smarter collaboration in specific teams, before performing a broader rollout in the organization. Pilots capture quantifiable progress in a low-risk environment, helping to develop the proof-of-concept for the institutional deployment of smarter collaboration.

In this white paper, we will discuss:

- The rationale
- Use cases
- Execution
- Example outcomes

### The Rationale for Pilot Programs

Most high-performing professional services firms have collaboration baked into their strategic plans. But a plan is never enough. Our research shows that firm members must feel connected to and inspired by it. We uncovered three requirements for turning a strategic plan into sustained action:<sup>1</sup>

- **Clarity of strategic direction**, so that people can align their priorities accordingly
- **The discipline to stay on track to achieve long-term objectives**, despite temptations of short-term, opportunistic wins
- **Accountability for individual outcomes** in a way that respects a culture of high-autonomy professionals

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<sup>1</sup> Dr. Heidi K. Gardner, Csilla Ilkei, and Dr. Andrew von Nordenflycht. [Closing the 'Strategy to Execution' Gap](#). 2021.

Your firm has made real progress towards clarity of strategic direction (for example, through conducting a smarter collaboration diagnostic, subsequent learning sessions, etc.). Should you decide to launch a collaboration-focused pilot program, you are making your strategy even clearer.

Now let's look at condition two: the discipline to stay on track to achieve long-term objectives. This is the essence of a pilot. Its key components are designed to keep people working toward strategy-driven collaboration. In successful pilots, these elements often include:

- **Masterclass** to launch and upskill leaders of each pilot group. Sample topics include using data to pinpoint multi-service opportunities; engaging and influencing other partners; and harnessing market intel to generate distinctive firm-level insights.
- **Objective-setting** with associated KPIs (leading and lagging indicators)
- **Ongoing (typically monthly) implementation support** with a dedicated coach
- **Measurement** against key performance indicators (and ideally versus a control group)
- **Wrap-up workshop** with firm leaders/pilot sponsors to review progress and key learnings, and decide on a broader rollout

Pilots also strengthen accountability. Leaders and participants set goals and milestones aligned with overall firm objectives, are measured against them, and thus are incentivized to act and make decisions aligned with these goals. In other words, the best pilots track, celebrate, and reward outcomes that coincide with the firm's strategy—by design.

## Use Cases

Whether specialized boutique firms or some of the world's largest global organizations, Gardner & Co. clients have benefited from a wide variety of pilot programs. Although each is highly customized based on the firm's strategic objectives and challenges faced, several focus areas have proven most effective:

- **Sector pilot program:** Centered on launching an industry-based program or strengthening an existing one, this type of initiative is the hallmark of smarter collaboration: it requires client service and thought leadership development across practice groups and geographies, and between technical specialists and subject matter experts. A pilot typically focuses on no more than two or three sector groups. It often includes assessing and strengthening leadership skills; generating or enhancing playbooks; clarifying roles, responsibilities, and decision rights (e.g., vis-à-vis practice

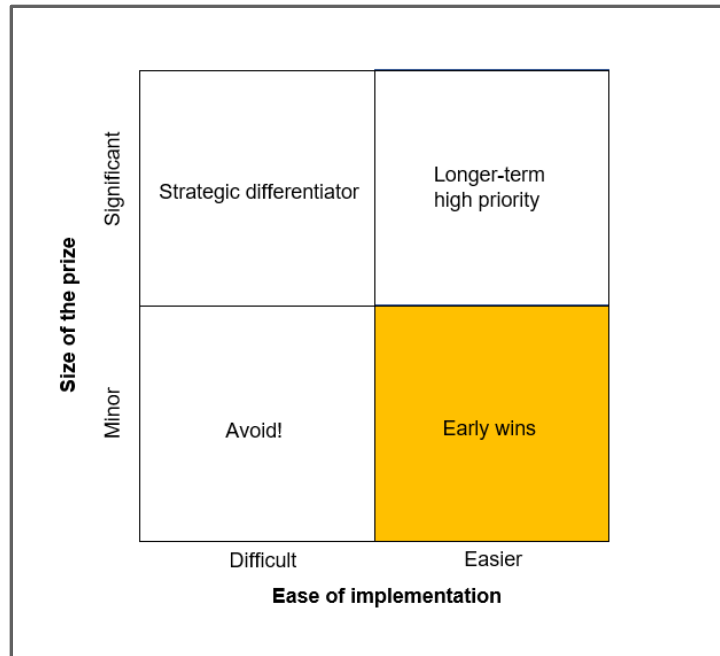
group leaders); and sometimes also making structural/process improvements (e.g., budget allocation, interface with business development support).

- **Key accounts pilot:** Launching or improving the effectiveness of service for a select group of key client account teams is a high priority for the best professional services firms. Devoting collaboration efforts to the highest-opportunity clients helps alleviate the time pressure barrier that they almost all face. Similar to the sector pilots, these usually involve elements of instruction and coaching, particularly among key account team leaders, as well as governance and structural improvements. Participating leaders' and contributors' level of enthusiasm and collaboration skills are factored into the program design.
- **Structural pilot:** We also help companies reengineer their fundamentals and mechanics, to enable collaborative behaviors across the institution. These include performance management (e.g., goal setting, appraisals, and rewards), leadership and governance (e.g., practice group or regional structures, decision making, and capabilities), core processes (e.g., lateral hire integration, marketing/business development budgeting), and role descriptions. By starting small, such as with a procedure in a particular practice group or function, our low-risk approach to boosting collaboration gains accelerated traction within a short time period. The common thread is that the changes are aimed at enhancing smarter collaboration and the associated outcomes.

## Execution

How can you decide what pilot to prioritize? The Gardner & Co. collaborative priorities framework highly encourages selecting “early wins” for the pilots (highlighted in Figure 1). They include areas where the firm already has much of the required expertise, data, and resources; motivation is high; and at least some quantifiable outcomes can reasonably be expected within the pilot timeframe. Ideally, we will have conducted a recent smarter collaboration diagnostic to guide prioritization and selection.

**Figure 1: Setting collaborative priorities**



Source: Gardner & Co.

The “longer-term high priority” opportunities require a bigger investment (and therefore entail more risk), whereas the “strategic differentiators” take significantly more time, effort, and resources to implement. Both will require engagement from a large number of internal groups or external parties, new skills or expertise, and more uncertainties. As such, they are rarely suitable for a pilot program.

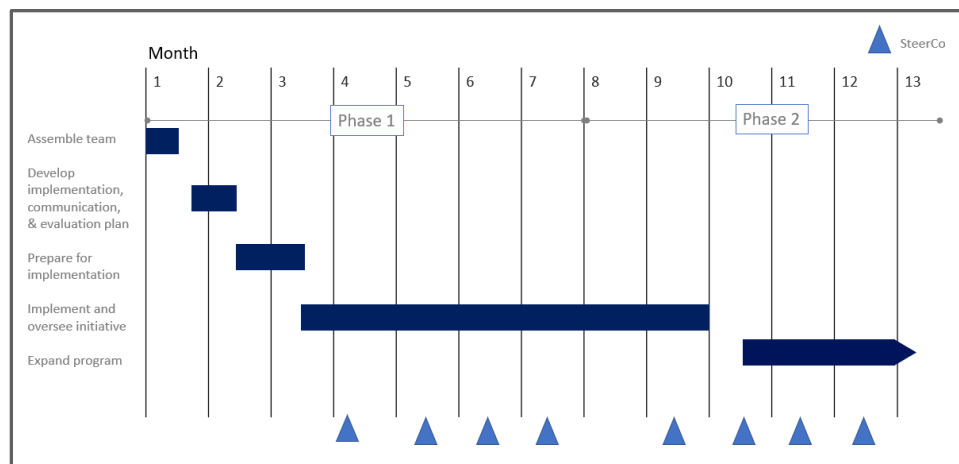
For piloting the early win initiatives, these three ingredients are mission-critical:

- **Executive-level buy-in.** You need top-level leaders to provide strong backing in the form of both tangible support (budget, personnel, etc.) and visible promotion of the smarter collaboration initiatives. And this commitment must continue long after the initial excitement for projects may have waned. You can boost their patronage by making them aware of collaboration successes that generated monetary and other benefits.
- **Dedicated steering committee (SteerCo).** At the outset of the pilot process, we develop a timeline that includes periodic check-ins with your project SteerCo. This group typically comprises approximately four to six people, including top leaders of the organization and a few others who are selected based on their commitment to the project. The SteerCo serves as a

sounding board and co-designer of the action plan(s), and members usually play an important role in securing broader commitment to the process and the outcomes.

- **Involvement of a diverse group.** By nature, pilots are experiments that hinge on innovation. The most effective way to induce thinking beyond “business as usual” is to open up the space for thinkers of different kinds: a variety of subject matter experts, approaches, styles, network connections, and behavioral tendencies—as well as representation across practice groups, functions, offices, and other structural silos as needed. When such diversity of thought is paired with mindful leadership that can make the most of the differences, a pilot is well-positioned to test new methods, actions, and audiences.
- **An implementation, communication, and evaluation plan.** This includes a timeline; key performance indicators (such as increased delivery of cross-practice service to specific key clients, and a higher number and impact of thought leadership articles published by the group); and a data collection plan for measuring progress against KPIs. Once again, communication is crucial: research shows people need to be continually reminded of how initiatives fit in with the larger strategy. If a pilot is not clearly linked to strategy and feels like a separate effort, people could experience “change fatigue”—when their attention is split across too many different projects. Instead, the pilot needs to be communicated as one piece of the firm’s coherent strategy implementation.

**Figure 2: Sample timeline for a smarter collaboration pilot**



Source: Gardner & Co.

Multiple pilots *can* run concurrently, particularly if you want to test different kinds of changes in a short timeframe.

## Outcomes

Even a relatively short, six-month pilot program can generate inspiring outcomes that help to rule in certain approaches while ruling out others—all while setting up the firm to generate significant return on its investment. While specific results depend on a pilot's particular objectives, below are examples of some outcomes we have co-created with leading organizations.

- **New governance model:** Following a merger, a prominent law firm used a set of practice groups to pilot a new leadership structure and decision-making model for 10 months. They used this time to examine the limitations (quality and speed of decision making) of their legacy systems. Throughout the weekly pilot and monthly leadership meetings, we regularly challenged and encouraged partners to reduce bureaucratic challenges and rework processes in accordance with desired outcomes. Through this feedback loop, we measured the effectiveness of these changes and revised those that fell short. The insights from the pilot guided the reshaping of the firm's overall governance model. In addition to the structural shift, the pilot boosted leaders' demonstrated capabilities and integrity, ultimately enhancing interpersonal and competence trust among the two legacy firms' partners—an issue uncovered in the pre-pilot collaboration diagnostic.
- **Revamped sector program:** An eight-month pilot within an accounting firm centered on two strategic sector groups. The goal was to transition individual sector initiatives to institutionalized client service based on industry insights. The pilot involved objective and accountability setting, regular hands-on group learning sessions, problem solving forums, and business development coaching. In parallel, the managing board benefited from counsel on firmwide resource allocation as well as incentive system decisions. The pilot resulted in clear, fine-tuned objectives (short- and medium-term) that were understood, accepted, and diligently executed on by group members (who had a robust mix of technical, leadership, business development, and marketing expertise). Pilot outcomes included increases in cross-practice collaboration, needs assessment meetings with target clients, and the number of proactive client approaches and

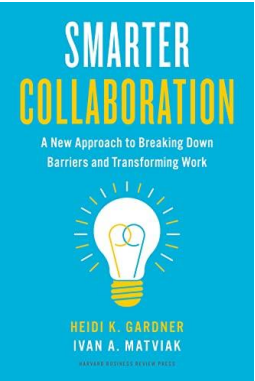
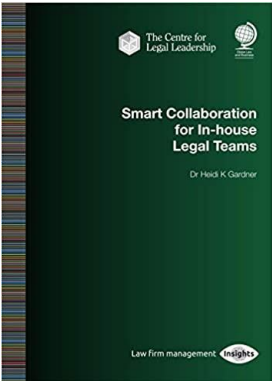
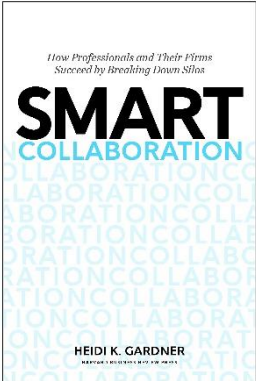
proposals. In combination with revised and agile workflows, the firm was able to compile a bespoke sector playbook it then rolled out to its other emerging sectors.

## **Conclusion**

Carefully designed and executed pilot programs are a low-risk way for firms to test new collaboration approaches aimed at fostering the right mindsets, behaviors, and culture to achieve top priorities. By eliminating “paralysis by analysis”—the quest for a perfected theory prior to action—the pilot approach unleashes leaders’ ability to gain quick progress and showcase those successes. These wins mobilize members of the organization at all levels, whether they have already bought into the idea or were waiting for signs of success before diving in. For your most important goals: Which one would benefit from some experimentation and clear proof of concept?



Related Resources from Dr. Heidi K. Gardner



## About Dr. Heidi K. Gardner

Dr. Heidi K. Gardner is a sought-after advisor, keynote speaker, and facilitator for organizations across a wide range of industries globally. Named by Thinkers50 as both a Next Generation Business Guru and one of the world's foremost leadership experts, she is a Distinguished Fellow at Harvard Law School and former professor at Harvard Business School. She is currently the faculty chair and instructor in multiple executive education programs at both institutions.

Dr. Gardner works extensively with her team at Gardner & Co., partnering with boards, executive teams, and other senior leaders to boost performance by embedding the principles and practices of smarter, agile, cross-silo collaboration within those groups and across the broader organization and ecosystem. This results in concrete, quantifiable performance improvements.



Altogether, Dr. Gardner has authored (or co-authored) more than 100 books, chapters, case studies, and articles. This includes best-selling books *Smarter Collaboration: A New Approach to Breaking Down Barriers and Transforming Work* (2022) and *Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos* (2017). Her research received the Academy of Management's prize for Outstanding Practical Implications for Management, and has been selected five times for Harvard Business Review's "best of" collections. Her work has been featured in major media outlets around the globe, including ABC, the BBC, Børsen, The Boston Globe, CBS News, CNBC, CNN, Les Echos, The Economist, Fast Company, the Financial Times, Forbes, Fortune, MSN, and Time.

Dr. Gardner has lived and worked on four continents, including as a Fulbright Fellow, and for McKinsey & Co. and Procter & Gamble. She earned her BA in Japanese from the University of Pennsylvania (Phi Beta Kappa, Summa Cum Laude), a master's degree from the London School of Economics, and a second master's and Ph.D. from London Business School.

## About Csilla Ilkei

Csilla Ilkei is an international thought leader, exceptionally skilled in translating science-backed research into pragmatic plans. During her more than 20 years as global manager and knowledge leader at McKinsey & Company, she was instrumental in unearthing global economic, business, talent, and industry trends.

With her experience living on three continents and working in 40 countries, Ilkei possesses an inspiring ability to partner with leaders to recognize potential challenges before they become obstacles to success. Her dedication to helping executives, human resources professionals, and others create an inclusive environment that sustains collaborative behaviors is incomparable. Ilkei has designed and delivered countless innovative products and programs that guide leaders, across a wide variety of sectors and regions of the world.



As Insights Director at Gardner & Co., she rigorously researches, meticulously designs, and skillfully leads programs that leverage smarter collaboration to achieve strategic business and talent outcomes. Her perseverance in challenging status quo thinking and commitment to leaning forward into beneficial changes foster bold and dynamic learning environments that drive real progress in these areas.

Ilkei holds an MBA from Corvinus University of Budapest.

## About Gardner & Co.

Gardner & Co. combines a unique blend of empirical research, academic rigor, and top-tier consulting experience to co-create solutions with the board, C-suite, and leadership teams to transform organizations.

### Contacts:

Dr. Heidi K. Gardner     [hgardner@law.harvard.edu](mailto:hgardner@law.harvard.edu)

Csilla Ilkei                [csilla@gardnerandco.co](mailto:csilla@gardnerandco.co)