



SMARTER COLLABORATION INSIGHTS

Sharing ideas to accelerate smarter collaboration

May 2025

FEATURED THOUGHT LEADERSHIP

This time we are sharing [a piece by Dr. Heidi K. Gardner](#) that energized an astonishing number of people on LinkedIn: more than 450,000 people viewed it, with high levels of engagement (and, of course, a few haters to round out the mix). We hope you find it helpful, and we'd love to hear your reaction...

I got fired yesterday. Seriously.

The owner of our gardening service texted me: "Our business has grown really fast in the last five years since I took over from my dad [the founder]. We made the hard decision to work only with customers who use our full range of services."

Since my husband and I are becoming more avid gardeners, we're doing some of the more interesting (aka, high-value) work ourselves. So the owner informed us that we're going to have to part ways.

What's astonishing to me is that this local landscaper is acting more strategically than many of the partners I advise in multibillion-dollar firms!

A major implication of smarter collaboration is that people need to focus their precious time on working with colleagues to serve the highest-value clients on their most complex challenges and opportunities. By default, this means "firing"

clients who are smaller and unwilling to partner on broader offerings.

Think about it: a professional services firm's "full range of service" is its expertise spread across geographies, practice groups, and disciplines. Too often, firms cling to a fragmented, reactive approach, unwilling to consolidate resources and double down on their most strategic opportunities.

This landscaping story offers three lessons for firms seeking smarter collaboration:

1. **Clarify your strategic focus.** Just as the landscaper decided to concentrate on clients committed to his full-service suite, professional services firms must identify their highest-value clients. These are the clients whose challenges are complex enough to require a multidisciplinary approach, where your firm can deliver unique, tailored solutions.
2. **Prioritize and commit.** The landscaper didn't hem and haw – he took decisive action to allocate his resources. Firms need to use data-driven approaches to identify opportunities where collaboration will have the greatest impact. This includes not just chasing the largest clients, but targeting those who are aligned with your expertise and goals.
3. **Be transparent and courageous.** Communicating strategic decisions – even when it means "firing" clients – is key to building a sustainable business. It's not easy, but it sets the stage for stronger, more rewarding relationships with the right clients.

So what's stopping us? Today I'm taking a hard look at Gardner & Co.'s client portfolio to see where I can be more strategic, bold, and transparent.

TOOLS

How do you get a tiger to change its stripes?

We're often asked, "Why do our leaders/partners struggle with collaboration?"

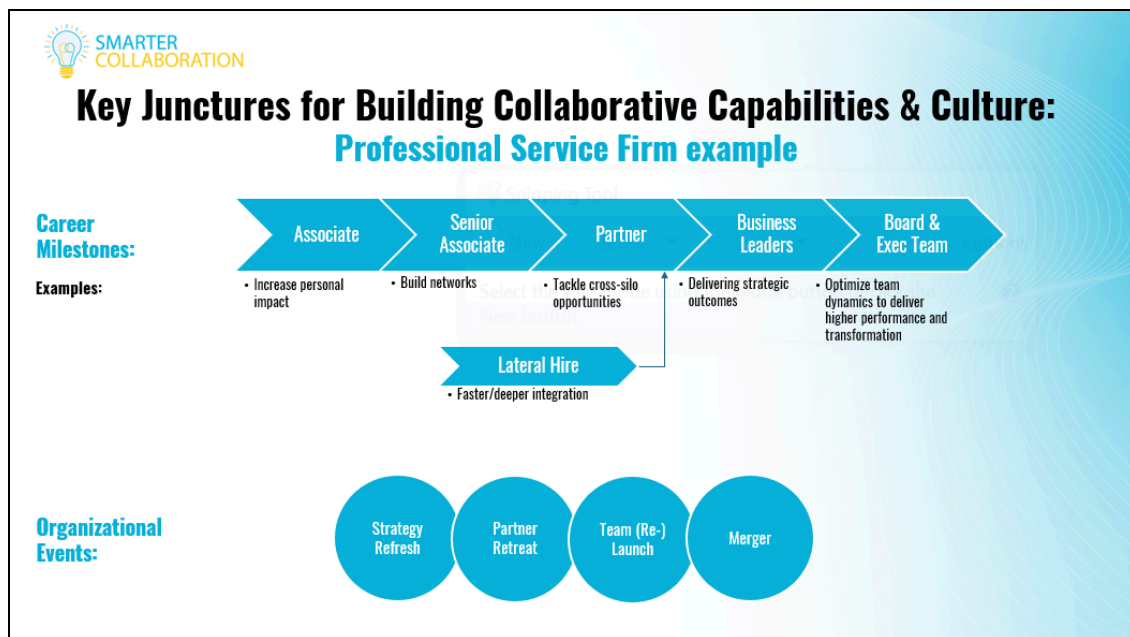
While many factors contribute – such as a lack of hiring, promotion, or incentives for collaborative skills – the biggest issue may be that training in these skills starts too late.

As a professional's career advances from new hire, to manager, to

leader/partner, expectations for collaborative prowess ramp up.

Yes, advanced professionals can learn to collaborate. But like all good life habits, smarter collaboration is more likely to thrive if the rights mindsets and skills are embedded early.

Our work identifies critical junctures where this embedding pays off. (A picture's worth a thousand words, so we won't summarize the graphic!)



Traditionally, Dr. Heidi K. Gardner and our team have tackled behavioral change at the most senior levels through keynotes and leader workshops that share the powerful science behind smarter collaboration. And the empirical evidence shows that done right, these kinds of offsite sessions deliver results (see [our HBR article](#)).

Now, though, we're also equipping SC champions with scalable, accessible resources to successfully spread these messages at earlier career junctions, much deeper into the organization.

We have developed tools to help leaders, L&D and BD professionals, and coaches convey the business and talent case (why it is essential) and then help their clients and teams build these capabilities. They include:

- **SC101 videos:** Professionally produced, short overviews of smarter collaboration and its outcomes. Pair these with our facilitator kit showing how to use the videos (as in, application exercises and discussion

prompts for each one) to create affordable, engaging in-person or virtual sessions.

- **Exercise guides:** Hands-on activities that connect smarter collaboration with top strategic goals. Useful for 1:1 coaching/guidance as well as small groups looking to embed smarter collaboration in their work routines.
- **“Check-ins with Csilla”:** Tailored advice for certified practitioners seeking to boost buy-in from leaders and professionals. These online sessions build on our significant experience bringing these concepts to life for quantifiable business results.

Ready to inspire change? Email ivan@gardnerandco.co to explore these and other options.

SMARTER COLLABORATION IN ACTION

This profile kicks off our new series on leaders who embody the principles of smarter collaboration to drive tangible business results. We start with one chief collaboration officer – a role we expect to see more and more across industries.

Spotlight on David Katz, Chief Collaboration Officer

As CCO, David Katz leads the collaborative charge at Redwood Services, a private-capital-backed, fast-growing platform. Redwood unites 2,500 employees across 19 residential HVAC, plumbing, and electrical partners that previously operated as independent businesses – so the collaborative challenge is strong.

As in many business ventures, the investment thesis is – in part – driven by smarter collaboration: joining these companies creates opportunities to share knowledge and resources, in turn creating more value together than any of them could do alone.

David’s mission, therefore, is to turn collaboration into a strategic advantage – breaking down silos, sharing lessons at scale, and powering smarter decisions. And when Gardner & Co. worked with Redwood, that energy was palpable.



Redwood Services Chief Collaboration Officer David Katz

"One of my greatest joys is hearing that a sales manager in Minneapolis flew to Memphis to learn another partner's approach – or vice versa," David said. "Seeing people grow, get promoted, and build friendships across markets – that's a big part of our secret sauce."

Way more than merely connecting people, David's role requires building and maintaining systems that keep leaders (at all levels) laser-focused on Redwood's growth strategy and helps teams learn from each other. Redwood brings this to life through several forums:

- **Leadership council:** Redwood relies on leaders from each partner to promote peer-to-peer learning in monthly sessions. This level of *direct engagement* across portfolio companies promotes innovation adoption far better than top-down "just run our playbook" approaches we've seen in some other investment-backed platforms.
- **In-person visits from senior leaders:** Members of the Redwood leadership team and the board, including the chairman, regularly join David on-site to meet with frontline teams. They mix genuine listening and heartfelt thanks with digging up practical insights – helping decision-makers stay connected to what's really happening on the ground.
- **Storytelling and recognition systems:** Redwood invests in an annual summit for partner company leaders (and their spouses), boosting trust and familiarity. A set of special awards honors those who have gone above and beyond in collaborating, showing just how powerful teamwork can be. In addition, a quarterly Redwood magazine spotlights standout contributions, keeping alive the spirit of shared success.



Redwood's annual collaboration award

David's leadership reflects core smarter collaboration principles:

- **Deep listening and empathy:** “You can’t steer a ship of collaboration unless you know how to listen.” David prioritizes understanding underlying concerns and acting with humility, which helps build trust across teams. While “listening” might sound obvious, Gardner & Co.’s work with chief-level executives shows that too many of them dominate conversations (and our SC360 helped them uncover that blind spot.)
- **Strategic relationship-building:** “People call me not because I’m so wise, but because I flip the conversation to focus on them.” David guides others to take on the same mindset, helping build a culture where people feel empowered. In such a high-growth business, a workforce emboldened to innovate is crucial.
- **End-to-end business understanding:** “If you’re trying to solve an operations problem, it might cause a finance issue, it might cause a marketing issue.” This system-level view is crucial for smarter collaboration, so David makes sure to involve everyone early on so they can spot challenges before they arise. True SC in action.

By shaping the role of chief collaboration officer and weaving smarter collaboration into Redwood’s very way of working, David shows that collaboration is a real competitive advantage. As Redwood grows with additional equity support, we expect that the culture and systems he’s built will keep fueling alignment, agility, and success.

MORE THOUGHT LEADERSHIP

"Go Be Brilliant Somewhere Else"

One of the hardest things to do as a project leader – or teammate – is knowing when it’s time for someone (maybe even yourself) to step away.

Projects evolve, and so do the roles and expertise we need. Smarter collaboration demands intentionality: building the right team at the start, then continually re-assessing who stays and who goes. Not as a slight but as an opportunity for everyone to maximize their value.

Here are top tips for team leaders:

1. **Start with the goal.** Before building the team, get crystal clear on what success looks like.
2. **Assemble the right team.** Bring in only the people [whose spikes](#) directly support that outcome.

3. **Set expectations upfront.** Make it clear from the beginning that participation is about using talents where they're most impactful. That way, when someone's role is no longer critical, they'll understand you're not sidelining them – you're freeing them to go be brilliant somewhere else.
4. **Re-assess regularly.** Ask yourself, "Does everyone here still serve a critical role in achieving our objectives?"
5. **Thank people and keep them informed.** Credit each person, in writing, for their contribution. Come assessment time, make sure they're rewarded for the part they played. Briefly keep them updated as the project progresses so that they see what they helped to accomplish.

Also, own your part as a teammate. If you feel like your skills aren't being fully leveraged, it's not just your privilege – it's your responsibility – to flag it and step aside if needed.

In this video, I further explore mindsets that enable a truly collaborative culture. Take a look and let me know: what would you add?



GenAI: Breaking Down Dysfunctional Team Norms

When was the last time you held back from speaking truth to power in a meeting? Perhaps you considered building a coalition beforehand, raising the issue privately, or even fantasized about a new job.

But did you think about using GenAI?

GenAI, when used effectively, can tackle challenges like hierarchical deference and groupthink. By offering neutral, data-driven insights, it validates diverse perspectives, fosters open dialogue, and accelerates smarter collaboration.

In meetings, innovative features – like airtime-based avatars that grow to highlight over-talkers – spotlight unbalanced dynamics, sparking self-awareness and meaningful change. By integrating seamlessly into team discussions, GenAI becomes a catalyst for more inclusive, effective collaboration.



For more on how GenAI can transform team dynamics, check out [this LinkedIn post](#).

OPPORTUNITIES TO MEET

Catch Up with Dr. Heidi K. Gardner and Ivan Matviak

Ready to book a client roundtable, an executive workshop, or a major offsite? Here are upcoming trips for Dr. Heidi K. Gardner and Ivan Matviak, in case you'd like to schedule time with either or both of them:

- Tokyo & Osaka: May 19 - 30
- Austin: June 2 -3
- Vienna: June 5
- Shanghai (at the World Economic Forum): June 24-26
- Doha: September 14
- Sydney: September 16-26

STAY CONNECTED

Keep in Touch

Follow Gardner & Co. on [LinkedIn](#) and [YouTube](#), and visit our websites ([here](#) and [here](#)) for extra news and insights on smarter collaboration.

Give Feedback

What else can we do together? Please send your thoughts to ideas@gardnerandco.co.

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