The Synergist

How to Lead Your Team to Predictable Success

THE SUMMARY IN BRIEF

Why do so many teams fail to perform — achieving compromise at best and gridlock at worst? And what does it take to end this gridlock? Wall Street Journal best-selling author and speaker Les McKeown shows how to take any team from gridlock to world-class success.

In The Synergist, McKeown argues that every successful team includes a critical player, the Synergist, who can take the three existing types — the bold dreamers (Visionaries), the pragmatic realists (Operators) and the systems designers (Processors) — and knit them together into a dynamic, well-rounded team. Most importantly, according to McKeown, the Synergist is a role that anyone can learn.

While most attempts at teamwork improvement deal only with the symptoms of group dysfunction such as distrust, poor communication and fear of change, McKeown addresses the root cause: the innately unstable Visionary-Operator-Processor triangle. Because each of the three styles’ motivations, views and goals are incompatible, without a Synergist every team will eventually implode, stall or underperform. Only Synergists can put aside their own agenda and interpret the language of difficult personalities, capture the best from each person and put the good of the enterprise ahead of their own egos.

McKeown, who has used techniques presented here in his consulting with Harvard University, American Express Financial Services, the U.S. Army, Microsoft, United Technologies Corp. and more, shows how any individual can fill this critical role, whether or not he or she is the formal leader of the group.

IN THIS SUMMARY, YOU WILL LEARN:

• How to recognize the signs of ineffective teamwork.
• How to make the right interventions at pivotal moments.
• What your team needs to succeed.
• How anyone can learn to be an effective Synergist.
Introduction: What a Synergist Is and Why You Should Care

If you’re involved with any group of people who are trying to achieve common goals, whether by leading a Fortune 500 company or volunteering part-time at a kid’s soccer league, you soon become acutely aware that those goals will be achieved only through the work of the people in the group.

Put simply, organizations don’t succeed in and of themselves. They succeed only through individuals working in groups and teams.

Groups and teams lie at the heart of every successful enterprise — in fact, they are the heart of a successful enterprise. Walk the halls of any organization, large or small, and you’ll see huddles of two or more people everywhere, interacting formally and informally, face to face and virtually, meeting in conference rooms and hallways, communicating by e-mail, phone, Web conference, social media and text messages, even occasionally by pen and paper.

A Vital Bridge

In the best — and most successful — organizations, it’s these interactions among individuals that together form a vital bridge between the organization’s overarching vision and the day-to-day actions required to realize that vision. From these multifaceted human interactions spring the ideas, decisions, plans, strategies and tactics necessary to move the organization forward to success.

In the worst — and least successful — organizations, these same interactions between individuals produce stress, indecision, confusion, uncertainty and distrust, frustrate the organization’s goal of realizing its vision, and drain the enthusiasm, commitment and direction of everyone involved.

For many organizations, perhaps even the one you work with, each day brings a mix of each. Some interactions gel and produce a profitable, positive result, while others gridlock or stall, producing little or nothing of actionable value.

Yet for every organization, the difference between the two is by far the single most important factor in determining whether the enterprise succeeds or fails. If you can ensure that when your people interact they are effective and deliver the goods, you win. Watch them stutter or fail in those same interactions, you lose.

Pass Me a Paper Clip

This simple fact — that the quality of people interaction is a fundamental requirement for organizational success — seems self-evident. Yet, every day in organizations large and small, untold thousands — quite probably millions — of group interactions take place, most of which fail to take the organization any closer to its goals. In many cases, groups meet, interact, then part, no closer to achieving their objectives than when they started.

This tide of unproductive and ineffective group interactions has a massive cost: It drains the global economy of billions of dollars a year, strangles creativity and initiative, and results in many businesses, divisions, departments, projects, groups and teams stalling out long before they’ve even begun to realize their full potential.
On an individual level, the cost of group dysfunction is just as high: It generates inordinate levels of stress, demoralizes entire workforces and demotivates otherwise high-performing people who would rather take a paper clip, straighten it out and stab it in their eye than sit through another interminable, ineffectual meeting.

And it’s not only formal meetings that are caught in this seeping maw of interpersonal dysfunction. Every type of interaction — one-on-one discussions, phone calls, e-mails, water-cooler chats, performance reviews, brainstorming sessions, even the annual picnic — can become blighted by misperceptions, misunderstandings and outright manipulation.

Breaking the Cycle

Not surprisingly, this frustrating, repeating cycle of dysfunction has produced an avalanche of resources purportedly designed to help groups and teams be more effective. Books, workshops, conferences, assessments, quizzes, coaching — you name it, there’s a tool of some sort designed to make group interactions work harmoniously and effectively.

Here’s a news flash: They almost never work.

The reason most group- and team-improvement programs fail to produce permanent long-term change is simple: It’s because they address the symptoms of group dysfunction (distrust, poor communication, fear of change, to name just a few) rather than the root cause. In fact, in many cases, symptoms are incorrectly labeled as root causes. Take distrust as an example, a factor many team-improvement programs concentrate on.

Distrust doesn’t appear out of nowhere; it always has a root cause. There’s always a reason (valid or not) why one team member distrusts another. Trying to eliminate distrust without dealing with the underlying root cause of that distrust is like filling up your gas tank when the car’s tires are punctured — it might be worth doing, but it isn’t going to fix your problem.

Making an End Run Around the Symptoms

The basic difference between an ineffective group interaction and a highly productive one lies in the existence of a single component — a natural, uncomplicated and easily introduced component at that — the role of the Synergist.

Introducing the Synergist role to your people interactions can produce a dramatic, profound and lasting effect precisely because it blows past the lengthy and complex list of all possible symptoms of team and group dysfunction and, instead, concentrates on just one thing: the single root cause of team and group dysfunction.

PART I: THE UNSTABLE TRIANGLE

Overview

Organizations do not achieve success — people achieve success through working individually and in groups and teams.

Everyone who participates in group or team work tends to act primarily in one of three naturally occurring styles: as a Visionary, an Operator or a Processor.

- **Visionaries** think big, generate creative ideas and take risks. They also become irritated by detail and can disengage easily when bored.
- **Operators** get stuff done. They take the Visionary’s big idea and translate it into actionable tasks. They like to be left to work alone and will do whatever is necessary to complete the task they’re given, even if it means breaking a few rules.
- **Processors** devise and monitor the systems and procedures necessary to enable an organization or enterprise to deliver consistent results in a complex environment. They think linearly and objectively, and are averse to undue risk.

The Visionary-Operator-Processor (V-O-P) relationship is not a naturally stable one. The tensions and conflicts caused by often competing desires are the root cause of most group and team dysfunction.

To make the V-O-P relationship stable, a fourth, learned style needs to be introduced. The Synergist style acts as a buffer between the V-O-P styles, taking the best from each and enabling them to work effectively together.

The Visionary

Visionaries cycle between active and idle mode, alternating between bursts of creative energy and recharging. They can be dangerous to be around when they come back from an idle period because of the multiplicity of ideas they generate.

Their ability to hyperlink to multiple subjects, coupled with their ability to hold seemingly contradictory viewpoints on the same subject, can confuse those who work with them.

Visionaries bring vision, flexibility, courage and the ability to simplify seemingly complex ideas. They also bring a pragmatic approach to getting things accomplished and not overhypothesizing.
On the minus side, team members can find it frustrating to have to deal with the Visionaries’ boredom with detail, their need to own all the team’s ideas and their extremes of commitment.

If you’re working as a peer with a Visionary, be selective in how you involve him or her. Listen nonjudgmentally and, rather than forcing new ideas on him or her, involve them at the outset in the idea-creation process.

If you manage a Visionary, schedule variety, accountability and frequent check-ins. Enforce a few important restrictions strongly, rather than trying to enforce many limitations weakly, and make sure the individual’s team isn’t overdominated by other Visionaries.

If you work for a Visionary, you can build valuable sweat equity by working long hours, mastering a broad grasp of detail and maintaining a positive demeanor. Once you’ve gained your boss’s trust, you can begin to be more selective about what initiatives you focus on and can provide a vital challenge function.

The Operator

Operators are intensely task-focused and will do whatever it takes to complete the job they have in hand — even if it means working outside the system and ignoring standardized procedures in order to do so.

Because of their propensity toward action, Operators can provide an effective reality check for groups and teams, help eliminate unnecessary implementation steps, and identify redundant or overly complicated systems and processes. It’s important to give Operators latitude in how they do what they do. Micromanaging Operators is ineffective and can cause intense frustration on both sides.

Working alongside an Operator can be frustrating because of the Operator’s impatience with delay, and his or her maverick approach to systems and processes. This makes relationships with Operators defensive and issue-oriented. If the relationship can be moved to a more proactive footing, potential areas of conflict can be identified early and problems avoided.

Effectively managing an Operator requires clear direction, providing autonomy, being consistent in enforcing boundaries and helping him or her prioritize and delegate.

Working for an Operator can be frustrating, as he or she is rarely around and isn’t a good delegator. It is important to physically accompany your Operator boss in order to develop a trusted relationship. Once you’ve done so, you can find ways to run interference (facilitate his or her interaction with the organization’s systems and procedures) and you may be able to tap into high-quality coaching and mentoring.

The Processor

Processors think logically, are compelled by data, not anecdote, and like to bring order to situations. They tend to be risk-averse and do not cope well with ambiguity or imprecision.

Having a Processor on your team will bring to the table consistency, scalability, accuracy and an objective perspective. A good Processor will also assist the other team members in identifying key metrics to use in controlling the enterprise.

Some Processors can overanalyze data to the extent that others find frustrating. Their resistance to both risk and change, their relatively steady pace of work irrespective of the need of urgency and the fact that they often respond to requests by saying no, can make them a challenge to work with.

Working with Processors can be made easier by respecting their need for order, listening to them and challenging them constructively, giving credit where due, and refraining from hyperbole and exaggeration.

If you are managing a Processor, set clear, precise goals, make sure the organization’s overall commercial priorities are understood, have patience and improvise sparingly.

If you work for a Processor, you will benefit from gaining an understanding of the underlying patterns or rhythms to the work, and similarly understanding his or her priorities (which aren’t always obvious). Be careful in communicating big surprises or bad news, and plan ahead to get access to a Processor’s mentoring and coaching skills. Innovate incrementally, not in giant leaps.

Gridlock

The combination of Visionary, Operator and Processor is an inherently unstable one, which leads to the group or team compromising or gridlocking instead of performing effectively.

The three main reasons for this are that Visionaries, Operators and Processors each have different inherent motivations, each view the team’s ultimate goal differently and each see the surroundings in which they work differently.

Visionaries are motivated to start new things and to solve problems. They believe the group’s primary purpose is to solve problems, and to do so they talk and
Their view of the landscape in which they work is dominated by patterns and perspective. Operators are motivated to finish tasks and fix things. They believe the group’s primary purpose is to take action, and to achieve this they decide and do. Their view of the landscape in which they work is dominated by opportunities and obstacles.

Processors are motivated to systematize and supervise. They believe the group’s primary purpose is to control, and to do so they analyze and align. Their view of the landscape in which they work is dominated by compliance and contingent liabilities.

These varying perspectives severely impact the team’s ability to work effectively by preventing the Visionary, Operator and Processor from naturally coalescing into a group; reducing the degree of interaction when they do; and preventing them from agreeing on a common view of what they are trying to achieve.

Limping to the End Line

Left to their own devices, the V-O-P team is inherently unstable and will descend into gridlock relatively quickly.

The V-O-P team usually goes through four phases:

1. Formal meetings. In this phase the Visionary, Operator and Processor first realize that they cannot, jointly, make consistently good decisions, mostly because their way of “showing up” in meetings is different and incompatible.

2. Informal communications. In phase 2 the Visionary, Operator and Processor try communicating one-on-one outside of the formal meeting structure. They soon discover that this too is ultimately futile, as the same incompatible differences still exist between them.

3. Meetings redux. In fact, the pain caused by trying to communicate informally turns out to be even greater than that caused during the formal meetings, and so the Visionary, Operator and Processor turn to the third phase: attempting shorter meetings, more focused on getting decisions made and restricting the V-O-P interaction.

4. Endgame: Compromise or gridlock. However, even in these constrained meetings the Visionary, Operator and Processor cannot but help let their natural styles emerge, and it’s not long before the team moves into the fourth phase, the endgame.

For most teams, the endgame involves one or more of four options: reducing expectations of the team and the participants, and simply continuing, even though no one now expects anything of value to emerge from the process; disbanding; obtaining outside help (which ultimately doesn’t work, thus only postponing the inevitable); or negotiating an implied compromise.

There is a fifth option, which many high-performing teams discover by trial and error: introducing a fourth, learned style, called the Synergist. Introducing this fourth style to the group changes the dynamic of the guaranteed-to-fail V-O-P team to something new, a V-O-P-S (Visionary, Operator, Processor, Synergist) team — one which has considerable chance of success.

From Triangle to Pyramid

The Visionary, Operator and Processor are like the epidermis of an organization — prick them and they bleed in predictable ways. The reactions of the Visionary, Operator and Processor are so ingrained — their natural styles so much a part of who they are — that the V-O-P team reaches a standoff, with the participants trapped in their own V-, O- or P-driven agenda. Viewed abstractly, such a team looks like a triangle, with the V, O and P each positioned at a corner.

So if the Visionary, Operator and Processor are not going to change their natural styles and we cannot remove them from the team, there is logically only one way to substantively change the existing team dynamics, and that is to add something: a fourth style, one which, when introduced into the team, will transform it from a flat, two-dimensional triangle into a fully realized, three-dimensional pyramid; a team with depth, freed from dysfunction, and released into productivity and high performance.

What Is a Synergist?

The Synergist is the missing link that transforms the two-dimensional V-O-P group into a truly three-dimensional team. It does this by enriching and transforming the interaction between the Visionary, Operator and Processor in ways we’ll examine momentarily.

The key defining characteristic of the Synergist style is that unlike the Visionary, Operator and Processor styles, the Synergist is focused primarily on what is best for the enterprise (the organization, department, division, project, group or team).

This detached perspective — not focusing reflexively on his or her own concerns — gives the Synergist a high-level perspective of the team’s activities. If, as
we’ve seen, the Visionary, Operator and Processor can be seen as the epidermis of the organization, each reacting reflexively and predictably, the Synergist can be compared to the neocortex, collecting information and signals from the rest of the body, processing them and outputting instructions that enable the team or group to perform productively.

The Synergist’s Toolkit

A key feature of the Synergist style is that it is primarily a learned style. Although natural Synergists do exist, they are rare, so in most teams the Synergist input comes from Visionaries, Operators and Processors who have learned to emulate the Synergist style.

The learning requires commitment. Synergism doesn’t happen overnight — it’s not like flicking a light switch. It’s more like developing a new habit — but anyone can master the basics relatively quickly.

The Synergist’s toolkit is nothing mysterious or magical — it’s essentially a set of nine learned skills that anyone can develop. None of the nine skills individually will be new to anyone who has worked in an organization for any length of time, and most people will have developed at least some of these skills already.

But there is one piece of “magic” that transforms these nine relatively mundane skills into something very special — the secret sauce of Synergism, and it’s a personal commitment on the part of the Synergist that governs and informs the use of the nine skills. The nine skills fit into two categories: personal productivity and teamwork.

Personal Productivity Skills

• **Time management.** The prospective Synergist’s challenge is to be on top of his or her own time management to the extent that he or she can engage with the team or group without feeling distracted or overwhelmed by his or her other commitments.

• **Priority management.** The Synergist’s challenge: Even if you are doing things right, are you doing the right things?

• **Crisis management.** The Synergist’s challenge: To be like water and react appropriately to crises: Are the ripples you create in response to a crisis no bigger and no smaller than they need to be?

• **Delegation.** The last skill needed in the category of personal productivity is delegation, the ability to hand off tasks better done by others, releasing you to do what only you can do best.

Teamwork Skills

• **Conflict management.** Synergists do not overreact to conflict — nor do they needlessly create it or, worse, avoid it. Instead, they manage conflict positively, always in the light of the enterprise commitment, seeking the best outcome for the organization as a whole.

• **Difficult conversations.** At the center of the Synergist’s toolkit is a readiness (and the skill) to draw out painful, difficult or negative issues as they arise and not to let them fester or grow. The Synergist builds understanding, breaks down barriers and develops unity in the team.

• **Communication skills.** The Synergist’s role here is about his or her ability to facilitate effective communication among the others.

• **Inclusiveness.** The Synergist’s role is to break down the brittle independence of individuals by ensuring that everyone on the team is jointly engaged in all aspects of the team’s interactions, not just those in which they feel most comfortable.

• **Accountability.** Finally, an active Synergist will ensure that the team holds itself accountable to do those things it commits to doing.

Starting Fast, Finishing Strong

There are two types of teams — organic teams and constructed teams.

Organic teams comprise a group of people who come together of their own volition (for example, to start a business or solve a community problem).

A constructed team is one put together by selection, such as a project group or a subcommittee.

Organic teams have a binary, win/lose success profile — if the team fails, so does the entire enterprise. Constructed teams work in a less primal environment and can underperform for some time without immediate consequence.

A constructed team is usually selected at the outset, and the selection process is based on factors such as functional knowledge, availability and willingness to get involved. The disposition of Visionaries, Operators, Processors and Synergists is essentially random. This team only rarely changes thereafter. Whereas, a successful organic team learns to adapt their team composition over time in order to reach their goal. This process of adaptation follows a predictable pattern, one that is based entirely, albeit subliminally, on ensuring the optimum sequencing of the roles of Visionary, Operator, Processor and Synergist.
inside the secret garden

synergists essentially do two things: they put the previously gridlocked v-o-p team back on track by removing conflict and tension, and they create an entirely new environment that allows the team to perform at the highest level.

every successful team or group works to the same hidden pattern: a predictable cadence in their interactions that produces flow, engenders cooperation among team members and results in high-quality decisions. only by accessing the synergist style can a group or team access this pattern. even in those rare occasions when the v-o-p team breaks through with a brief spurt of productivity, they do so because one or more of the team members is subconsciously operating in the synergist role. most importantly, only the synergistic team can consistently operate within the pattern.

the pattern is a natural one, a subliminal rhythm that all successful teams fall into. natural synergists understand the rhythm intuitively. a team blessed with a natural synergist will find itself subconsciously following this new pattern because the synergist team member will prod it to do so. conversely, the visionary, operator and processor do not “naturally” understand this pattern of successful team interaction — in fact, the v, o and p tendencies fight against it, pulling the team’s interaction away from the new pattern and into failure.

the rhythm of success

all groups and teams are formed for the same basic purpose: to pool the knowledge, experience and skills of each individual member in order that they may together produce high-quality decisions on behalf of the enterprise as a whole. because of this, all successful groups and teams, irrespective of their specific goals, follow a similar route or pattern in their interactions — the pattern of high-quality decision-making. at the 30,000-foot level, this pattern of high-quality, team-based decision-making looks like this:

investigation → interpretation → implementation

for the group to deliver a high-quality decision, it must move through these three sequential stages, which we’ll call a “3-1” pattern. first, investigation: the group has to collect the information it needs in order to make a good decision. second, interpretation: the information and data have to be interpreted, from which comes the actual decision. third, implementation: the group must determine what needs to happen in order for the decision to be implemented (by themselves or by others).

stage 1: investigation

the investigation stage can be short and simple, or long and complex, depending on the issue under consideration. either way, successful teams, those with strong synergistic input, consistently address three imperatives at the investigation stage: intellectual rigor, embracing change and financial understanding.

in the context of high-quality, team-based decision-making, we can define intellectual rigor as: the commitment to ask as many questions as are necessary to uncover all the material information required to make any needed decision.

by keeping the team focused on the importance of intellectual rigor while blunting the extremes of possible reactions, the synergist takes the team into flow right from the start. as a result, the visionary, operator and processor begin building the muscle of productive interaction.

synergists coax the following behaviors from their team to deliver intellectual rigor:

• we go beyond an initial information exchange.
• we do not rush to judgment.
• we do not instantly accept any one team member’s analysis of a situation.
• we ask detailed questions to uncover key facts.

the second imperative in the investigation stage is to embrace change. in this context, we can define embracing change as: the commitment to identify, assess and embrace positive change agents, and to identify, assess and account for unavoidable negative change agents. discussions at the investigation stage are often brittle and restricted to what is already known. it is the synergist’s role to encourage behaviors that break this dynamic. the behaviors that synergists encourage for acceptance of change include:

• we explore industry trends outside of our organization.
• we are in close contact with our customer base.
• we read and research outside industry sources.
• we challenge fundamental assumptions.
• we work outside our comfort zone.

the third imperative in the investigation stage is financial understanding, which, in this context, we can define as: the ability to read and understand the basics of an income statement, a balance sheet and a cash flow projection. one of the most notable characteristics of teams operating without a
Summary: THE SYNERGIST

Synergist is how frequently their outputs are financially naive. They often either ignore the financial implications of their decisions or make sweeping assumptions that don’t hold up in the real world. An effective Synergist will ensure that this gap in financial understanding is filled, either by co-opting someone onto the team (even temporarily) who can help or by providing those team members who do possess an understanding of how the numbers work with a safe environment in which to share their knowledge.

Four behaviors which indicate that a group is meeting the imperative of financial understanding are:

- We can read and understand basic financial statements.
- We request the financial data underpinning the decisions we make.
- We understand the financial impact of our decisions.
- We have a balanced focus on revenue, profits and cash.

Pulling the Trigger

Stage 2: Interpretation

The second I of the 3-I process is Interpretation. The Interpretation stage involves working through the information that was gathered in the Investigation stage with the goal of making a high-quality decision based on that information — tempered by the team’s experience and knowledge. The three Synergistic imperatives in this stage — stamina, discipline and objectivity — not surprisingly echo the three main missing factors in the non-Synergistic V-O-P team’s deliberations.

Previously, the inherent tensions in the team made the interactions between the Visionary, Operator and Processor so fraught that it would quickly drain the participants of all three imperatives. Now, with those tensions banished or greatly reduced, the Synergistic team must learn to rebuild the muscles of stamina, discipline and objectivity in order to stay focused and engaged during the Interpretation stage.

While the team will not be required to exhibit a high level of all three on every occasion — sometimes the Interpretation stage can be short and relatively simple — an effective Synergistic team will need to be able to draw on each one of them regularly and often.

1. Stamina. The stamina imperative implies that the team has the mental, physical and emotional strength to concentrate for prolonged periods on the detail of both decision-making and implementation.

2. Discipline. The discipline imperative implies that the team can maintain focus on and commitment to a course of action until it is completed.

3. Objectivity. The objectivity imperative implies that the team will base its decisions solely on the appraisal of the relevant facts, without undue consideration of personal prejudices.

Making It Work

The final stage of the 3-I process is the Implementation stage, when the group or team must determine what needs to happen for their decisions to be implemented.

Stage 3: Implementation

For the old, dysfunctional V-O-P team, the Implementation stage is usually abrupt; once a decision is made, it is released into the wild and left to fend for itself. It’s therefore not surprising that the implementation rate of V-O-P team decisions is typically low. Without guidance and help from the team that came up with the decision in the first place, there are simply too many ways in which it can be derailed or sandbagged.

For the Synergistic team, there is no reason for this to be so — with the team in flow, the extra time invested to ensure a smooth handover from making a decision to successfully implementing it is time well spent.

In essence, the Synergistic team must act as its own midwife — not just birthing the decision, but tending and caring for it in the first stages of implementation until it has reached the point where its survival is assured. Achieving this requires that the team meet three imperatives: consensuality, communication and accountability:

1. Consensuality. The team will commit to early, frequent and congruent consultation with key individuals — specifically, those holding authority, responsibility and/or influence over the implementation or outcome of key decisions.

2. Communication. The team will fully explain, to as many stakeholders as possible, as often and in as much detail as is required, the key implementation steps for all major decisions.

3. Accountability. The team will establish formal structures and processes by which each team member is held accountable for the satisfactory conclusion of his or her implementation commitments.