



Delivering Blended Value in the Education Marketplace

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Delivering Blended Value in the Education Marketplace

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
Sarah McLean

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

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Dedication page

For my beloved father watching from heaven, Harry E. Watts, and my fearless mother, Marilyn Watts who encouraged me to live my values, follow my passions and question everything.

For my husband, J. Campbell McLean, the most righteous human being I know, whose endless patience, grace and love continue to serve as our family's strong foundation. And for my children, Amelia, Molly and Watts McLean; may you always remain curious, be generous with others and follow your purpose.

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The members of my committee and other mentors have each contributed unique knowledge and expertise to my work and development. Elizabeth City is a mentor who has profoundly shaped my leadership. She models for me how vulnerability is a characteristic of great leaders, not a liability. She helps me to see going fast alone is not as good as going further together. Chet Huber endows me with his extraordinary experience in the business world and his incredible ability to translate those learnings to education and life. His humility is first class. Bob Moesta served as the fourth, unofficial member of my committee. For no reason other than his curiosity and deep sense of purpose did he give countless hours of his time and talents to support my work and my development. I will never be able to "unsee" the job-to-be-done in the world around me. Finally, I would not be writing this capstone without the opportunities Dr. Andrés Alonso provided. He helped me see leadership as more than "the fast pitch." I am grateful, jefe.

What will not appear in this capstone beyond this section is the incredible personal challenges that my family faced during this ten months. It was arguably one of the most personally difficult times in my adult life and yet, I will look back to find an experience where the people who supported me professionally and personally were often one in the same. I will forever be in debt to so many for their empathy, generosity, love and grace. Liz Thurston was a foundational rock, an angel sent from above whose commitment to my family will never be repaid. Andrea LaRocca, caught my tears and celebrated my joys as the roller-coaster journey unfolded (and made me a substantially better writer over 3 years). My nephew and niece, Dylan and Brianna Pearson, remind me that influencing an individual life is just as important as impact at scale. Lastly, I continue to be in awe of the incredible love and support of my Ed.L.D. cohort family and remain inspired by the life-changing work they have done and will continue to do on behalf of kids across the country. I will forever "look for what other people need" and know "we are our own best resource."

Abstract

I served as a resident at Education First (Ed First), a national, mission-driven, for-profit organization that provides a wide array of policy- and strategy-related services to support states, districts, policymakers, advocates, and practitioners in K-12 education. From 2006 to 2015, the organization grew from a one-woman start-up to a 50-person, consulting firm with client relationships with some of education's most influential organizations, including the U.S. Department of Education and the Bill and Melinda Gates Foundation. In early 2016, for the first time in the organization's history, it found itself with declining revenues. Ed First's partner owners seized this opportunity to step back and take stock on what they had accomplished, the challenges they were facing, and what the future might hold. I was brought in to Ed First to provide analysis and make recommendations on their business model, specifically how well it was organized to deliver impact and sustain itself financially, and to help identify its current and future positioning within the education marketplace. This Capstone examines my work at Ed First to capitalize on the organizational urgency to strengthen the firm's business model, restoring its financial positioning and its capacity for impact on the field of education. My work draws heavily on Clay Christensen's jobs-to-be-done and business model frameworks, undergirded by research on the history and utility of mission-driven for-profit organizations. Through Mark Moore's strategic triangle framework and Ron Heifetz's adaptive leadership framework, I deconstruct my work and mine the successes and challenges of my efforts and the implications for my own personal leadership, for Ed First and for the education sector writ large.

Introduction

For decades, businesses and organizations have come and gone, attempting to bring their goods or services to people across the country. According to Harvard Business School researcher Michael Tushman, “The biggest problem they have is answering: Who are we, and what do we do? Senior leaders often do not attend to this identity question. They close their eyes to what’s going on in the world” (Gerdeman, 2016).

In illustration, the Ball Corporation has existed for over 100 years because it has stayed attuned to customers’ evolving container needs over time, rather than remaining wed to a single product. Starting with wooden buckets, moving to glass jars, and finally to aerospace engineering, the Ball Corporation’s identity has been one of containment and packing, grounded squarely in the things people and companies need contained. Like other companies that have maintained successful longevity, Ball aims to maintain a two-way relationship with a group of people for the purpose of creating something together, starting from their values, desires, and struggling moments.

Organizations like Ball are successful because they have discovered consumers’ jobs-to-be-done (JTBD). Famous business innovation researcher Clay Christensen defines JTBD as the progress that a person or organization is trying to make in a particular circumstance (Christensen, Hall, Dillon, & Duncan, p. 13). Stated a different way by Harvard economist, Theodore Levitt, “People don’t want to buy a quarter-inch drill. They want a quarter-inch hole” (Christensen, Cook & Hall, p. 1).

Equally important, organizations that persist have aligned and re-aligned their business models over time to meet changing demands. In this Capstone, I lay out my own journey to help Education First identify its value proposition through the JTBD framework

and the subsequent business model shifts that would be required to deliver those jobs over time.

Education First (Ed First) is a national, mission-driven, for-profit organization that provides a wide array of policy- and strategy-related services to support states, districts, policymakers, advocates, and practitioners in K-12 education. Ed First organizes its work via Focus Areas: Strong Systems, Outstanding Educators, Engaged Students, and Effective Organization and Investments. The specific services it provides include: Strategy & Counsel, Policy Solutions, Program Design & Implementation, and Networks & Collaboration. The organization maintains a diverse portfolio with clients that span the K-12 sector with one-third of their revenue generated from local and national philanthropies and additional revenue stemming from local and national non-profits to local and state education agencies, to research institutes and advocacy groups. Given Ed First's exclusive focus on education, staff size (approximately 40 employees at year-end 2016), and size of client contracts (71% in 2015 and 2016 were under \$250,000), many (including its owners) would consider Ed First a boutique consulting firm, especially in comparison to large, management consulting firms like McKinsey or Parthenon.

The organization's stated mission is "to deliver exceptional ideas, experience-based solutions, and results so all students – and particularly low-income students and students of color – are prepared for success in college, career, and life" ("Our Mission & Vision", n.d. para. 1). Ed First's organizational theory of action is as follows:

"We believe that if Education First:

- Delivers consistently excellent work by nurturing a vibrant organization with unparalleled talent where exceptional ideas and solutions thrive;

- Builds capacity in partners and clients through our Services: Strategy and Counsel, Policy Solutions, Program Design and Implementation, and Networks and Collaboration; and
- Focuses on improving and influencing what matters most for learning: Strong Systems, Outstanding Educators, Engaged Students and Effective Organizations & Investments;

Then, our work will improve the nation's education systems so all student- and particularly low-income students and students of color- are prepared for success in college, careers and life" (Education First, 2015).

Ed First's founding partner, a former employee of a large philanthropy disillusioned by lackluster consulting support with specific knowledge and expertise in education policy, said the organization was "...designed to be the consulting firm I always wanted, but could never find," (personal communication, June 2016). Founded as a limited liability corporation (LLC) in 2007, Ed First is virtual, with no home office and employees spread across 16 states. Unlike the traditional consulting-firm roster of business school graduates and analysts, its staff is almost exclusively former education practitioners with experience in teaching, policy advising, grant making, and district or state leadership. As their website states, "We are educators and strategists who help leaders and organizations thrive," ("Who We Are", n.d. para. 1).

When describing the firm to external audiences, staff often relay that Ed First is a for-profit organization with a not-for-profit soul. The firm does not adhere to a traditional operating structure, but rather has a more autonomous, flat organizational structure. In place of a manager, most staff members have a "champion" who is there to support their growth and development.

The organization's website describes its culture as "...obsessed with quality, fun-loving and passionate about success for all students," ("Our Culture", n.d. para. 1). Their aspiration translates into practice and manifests itself in staff retention outcomes. The average tenure of an "Ed Firster" is 4.25 years, one to two years above the management consulting industry average¹.

From 2008 to 2015, Ed First grew from a three-person consulting shop yielding \$730,000 in annual revenue to an almost 50-person professional services firm, governed by three equity partners and one non-equity partner, collecting \$10 million in revenue. From 2009-2011, the firm gained traction by building a series of high-profile strategy and implementation plans for national organizations, foundations and school districts. It also boosted its brand recognition by supporting a cadre of state education agencies in their reform and strategic planning efforts, most notably supporting states to develop their Race-to-the-Top (RTTT) applications and plans. Ultimately, they supported four state clients to secure one billion dollars of the four billion dollars awarded to twelve states from through RTTT. In October 2011, the U.S. Department of Education released its largest-ever technical assistance grant, the Reform Support Network. Ed First won a significant portion of this grant money, sub-contracted through ICF International, to provide support to all RTTT-winning states. This award substantially increased the firm's revenue, access, and expertise in RTTT reform priorities such as standards implementation and teacher evaluation. Over the next several years, Ed First grew rapidly, building new core competence and brand recognition.

¹ According to a 2017 article in the Financial Times, the average tenure of a management consultant is 2-2.5 years- <https://www.ft.com/content/d42434b2-6b69-11e0-a53e-00144feab49a>

During this period of growth, the firm appointed as its first Chief Executive Officer (CEO) a newly hired consultant with management experience to lead the firm's day-to-day operation. This decision was driven by the firm's growth and the need for full-time executive leadership to build the necessary infrastructure to support the firm long-term. The partner team kept the overarching governance function, like that of a board of directors, and also continued to sell and engage in billable work with clients. The choice to hire a CEO in September 2012 was made unilaterally by the partners without seeking input from the close-knit staff team. There was a brief period of recoil from staff, particularly those who had been with the firm the longest, as they felt uncertain about what such a choice signaled for the future of the firm they had helped to build.

The organizational climate resettled over the next six months and the firm's already strong culture became more vibrant, even while growing by more than 60 percent. During the CEO's tenure, the firm refined its focus areas, grew its internal team to build important internal infrastructure for a rapidly growing firm and led focused efforts to align the firm on an equity agenda and led the organization to revise its vision and mission to reflect this commitment. The CEO also led efforts to diversify the organization, tripling the percent of staff (from 10% of a staff of 20 to 38% of a staff of nearly 50) who identify as people of color from 2012-2015.

Yet, by the end of 2015, the majority of RTTT grant-funded work had sunset at the federal, state, and local levels. Additionally, many of the once-popular reforms promoted through the RTTT program (college- and career-ready standards, performance-based teacher evaluations) were falling out of favor on the political stage and losing traction. In December 2015, the Every Student Succeeds Act (ESSA) was passed unexpectedly,

quickly and with a high level of bipartisan support. This unanticipated development caused many education organizations, public and private, to pause on advancing significant work forward, including hiring consultants, as each took stock of the new law's implications. Lastly, according to Ed First's founding partner, from December 2015 until May 2016, the Bill and Melinda Gates Foundation paused all organizational grant making and contracting during a leadership transition (personal communication, March 2017). This organization had served as an important client to the firm over time. With the national federal and prominent philanthropic agenda shifting and the future unclear, Ed First's leaders found themselves asking existential questions about which reforms were likely to support long-term change in the sector.

In early 2016, the firm fell significantly behind its projected sales targets and without the analytics and business processes to foresee the downward turn in enough time to activate business development efforts. As a result, the CEO and the firm's partners executed its first-ever reduction in force, eliminating three full-time positions from its then approximately 45-person staff team for the first time in the organization's nine-year history. While its close-knit, supportive organizational culture was certainly strong enough to withstand such a blow, the news had a strong impact on the staff.

In February 2016, now with a projected decline in revenue at year's end for the first time since the firm's founding a decade earlier, Ed First's partners and leaders stepped back to take stock on what they had accomplished, the challenges they were facing, and what the future might hold. In the spring of 2016, the organization made a few pivots in their management structure, replacing the CEO role with a managing partner role that would serve the chief executive function for the organization. By the middle of 2016 when I began

my residency at Ed First, the firm's partners eagerly sought to assess and test the firm's value proposition, the need for professional services in the market, and the capacity of the organization to deliver on both.

I was brought in to Ed First to provide analysis and make recommendations on its business model, how well it was organized to deliver impact and sustain itself financially, as well as its current and future positioning within the education marketplace. This Capstone examines my work at Ed First to capitalize on the organizational urgency to strengthen the firm's business model, such that it might restore the firm's financial positioning and its capacity for greater impact on the field of education. I present research on the history and utility of mission-driven, for-profit organizations as well as research on how successful organizations like Ed First understand and assess their value.

I then introduce Clay Christensen's JTBD and business model frameworks, later used to conduct in-depth analysis of the organization's clients, its essential resources and core processes. I also describe how I, operating in a strong organizational culture and from a position of informal authority, translated this information into understanding for the firm's leaders and other staff using research on organizational change management. I share how, from this understanding, recommendations were co-created to strengthen the firm's value proposition and, like the Ball Corporation, align the business model necessary to deliver that value. Applying Mark Moore's Strategic Triangle framework to understand public value and Ron Heifetz's adaptive leadership framework, I analyze the successes and challenges of my efforts. Finally, I close describing the ensuing implications for my own personal leadership, for Ed First as an organization, and for the education sector writ large.

Review of Knowledge for Action

As a mission-driven for-profit organization, Ed First's success is defined by both its financial positioning and its impact on the field. It seeks profit to grow and sustain its business so that it can have an ever-increasing and more powerful impact on its clients, many of which have direct influence on students' lives.

At the behest of the firm's partners, my strategic project focused on internal analysis of the firm's business model and the development of evidence-based recommendations to build and sustain a successful enterprise. The overarching question the organization asked through my work is also the question that drives this Review of Knowledge for Action (RKA): How can a mission-driven, for-profit organization optimize for both social impact and the financial profit to sustain a healthy organization?

The answer to this question has implications for the firm's strategy, resource allocation, management and where it chooses to compete in the education marketplace. Understanding the nature of the current business model, the value sought by current and potential clients and the extent to which the firm is currently organized to deliver on that value was critical in advising the organization on its future direction. Equally important was acquiring knowledge on how to enable and lead organizational change, as recommendations on how to change the business model will only be realized by the people who are making the organization go on a day-to-day basis. Therefore, this RKA focuses primarily on:

- The origin, nature, and utility of mission-driven for-profits,
- How organizations, namely mission-driven for-profits, understand and assess their value, and

- Strategies for effectively leading organizational change

The Origin, Nature, and Utility of Mission-driven For-profits

Mission-driven businesses are a relatively new phenomenon in the United States and were born out of the concept of social enterprise. Social Entrepreneurship Ventures (SEVs) serve a social mission, often trying to tackle some of society's most intractable problems. They earn revenue from selling goods and services in the open market, but then reinvest those profits back into their mission. The social mission is thus not surpassed by the organization's need to maximize profits (Mair and Marti, 2006).

Figure 1

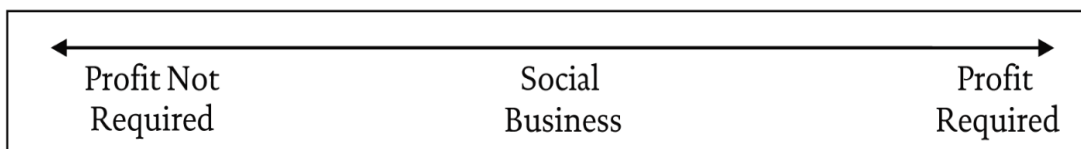


Figure 1. A Continuum of the Concept of Social Commerce. Reprinted from The social Entrepreneurship Matrix as a "Tipping Point" for Economic Change (p. 4), by B. Massetti, 2008, retrieved from <https://emergentpublications.com/> Copyright 2008 by Emergence: Complexity and Organization.

Silvia Dorado paints a picture of social ventures on a continuum (see Figure 1):

“Regardless of the wide variety of examples and differing perspectives taken on this form of social commerce, the integrating common denominator that consistently remains is the extent to which profits are required to operate the business” (2006). Mission-driven for-profits live on this continuum; they serve a dual bottom line – one of social impact and one of financial profit. Mission-driven for-profits differ from traditional not-for-profit organizations in that their market-driven revenue must exceed operating costs to successfully function (versus revenue from donations or non-market origins). Also,

mission-driven for-profits differ from traditional profit-based businesses in that their profits are used to support the social mission in addition to increasing the financial profits for shareholders and owners.

Given the growth of social enterprises and their distinct yet novel nature, Brenda Massetti builds on Dorado's work and offers a framework, the Social Entrepreneurship Matrix (SEM) (Figure 2). The SEM is designed to orient organizations along two variables, the degree to which profits are required to run their business and the degree to which social versus market forces drive their decision-making. Organizations in Quadrant I would be considered the more traditional non-profits. They provide some good or service that can be sold on the market and profits are invested back in the mission alongside any other external funding they receive, usually in the form of grants or donations (Massetti, 2008). Organizations in Quadrant IV, by contrast, focus almost exclusively on profit maximization: "In fact, the corporate form of business legally requires managers to put profits above all other social interests. As a result, they have become extremely adept at saying or doing anything to increasingly enhance their narrowly-focused bottom lines" (Massetti, p. 6).

Figure 2

Figure 2. A Matrix of Social Entrepreneurship. Reprinted from The social Entrepreneurship Matrix as a "Tipping Point" for Economic Change (p. 4), by B. Massetti, 2008, retrieved from <https://emergentpublications.com/> Copyright 2008 by Emergence: Complexity and Organization.

Mission-driven for-profits live in Quadrant II. These organizations provide a unique opportunity to serve a social mission in a business model that is self-sustaining in a free market, meaning they make money beyond their operating costs for their shareholders and the economy.

The number of Quadrant II organizations that exist, like Ed First, are growing (Eakin, 2003). Evidence can be seen in the advent and growth in the use of benefit corporations or B Corps, which are for-profit companies certified by an independent, state-recognized, third-party provider to meet state-articulated standards of social impact. Establishing an organization as a B Corps expands the obligations of boards, requiring them to consider social impact as well as the financial interests of its shareholders. Since April 2010, over 30 states have passed legislation for the creation of B Corps (Raskin,

2011), and according to the B Corps website, benefit corporations have grown further into 50 countries and 130 industries, including those seeking impact on the education sector (“What are B Corps?,”2017).

There is also a growing number of for-profit companies seeking to make a social impact in the education sector using the B Corps status. Max Ventilla, founder and CEO of AltSchool, a network of technology-enabled personalized learning schools, established the organization as a B Corps with the explicit hope of “distinguishing itself within the education sector and modeling a better way to do business for its students and families” (AltSchool, 2014). Ventilla justifies this choice citing the need for investment capital (often only offered when a return on that investment is possible) to make necessary shifts in the infrastructure and approach to traditional public school. Ventilla, like many mission-driven for-profit leaders, was looking for a model that could offer more financial flexibility than non-profit status and more human-capital flexibility than possible in much of public education as a result of unions (Battelle, 2016).

Too often the motives of non-profit organizations and for-profit businesses are bluntly characterized as good versus evil. There are many for-profit companies that exist for the sole purpose of making money and some will engage in unethical behavior to achieve their financial goals. It is also true that there are many non-profit companies that engage in the same behavior, just under a different business model. In the *Magazine of American Non-Profits*, Jan Masaoka outlines several forms this unethical behavior takes, usually some form of embezzlement (2008). The reality is that bad actors can work anywhere. The existence of unethical behavior in a part of a sector should not lead the

total demonization of for-profits, excluding the model as a viable (and growing) option for leaders seeking to have an impact on the social sector.

The growing number and attention being given to mission-driven, for-profit organizations in education and across a number of industries, such as financial lending (e.g. Grameen Bank), human resource management and staffing (e.g., NewSource Staffing, Inc.), and consumer retail (e.g., One Thousand Villages) (Dorado 2006), signals a value in the field and illuminates the potential for this type of organization to play a greater role in the education sector. Because mission-driven for-profits sit outside of traditional bureaucracies and government regulation, they have a number of freedoms and flexibilities, specifically related to hiring and financing. For example, public agencies and non-profits are held to a higher level of scrutiny from the public and through regulation regarding what salary they can offer, which limits the talent they might attract. Non-profit organizations and public agencies that are beholden to such regulation could benefit from the flexibilities and freedoms through partnerships and collaborations with such organizations since they are able to attract and pay for talent who demand a higher salary.

How Organizations Understand, Assess, and Organize Around Their Value

As an organization seeking financial and social impact returns, mission-driven for-profit organizations need to measure their investments in economic and social terms. Non-profit strategy and management consulting expert Jed Emerson (2003) calls for a “Blended Return on Investment” (BROI) to measure the investment performance of an organization delivering on a Blended Value Proposition, which is the intersection of value measured in financial and social impact terms – in other words, the “dual-bottom

line.” The financial success of profit-driven organizations is often calculated using key performance indicators (KPIs) such as net profit, net profit margins, market share, and market share. The measures of social impact are more specific to the sector of society where the change is being sought, and often feel invisible because it is not as obviously quantified as money. Trying to identify measures of social impact and organizationally react to them has proven difficult across industries.

However, there are lessons to be learned and tools to be adapted from the non-profit sector, which by definition exists more exclusively for the public good than for the financial gains of investors. For example, the Matrix Map is a visual tool that illustrates all of the major investments of an organization’s business model, mapping the financial and mission impact of each one (see Figure 3) (Zimmerman & Bell, 2014).

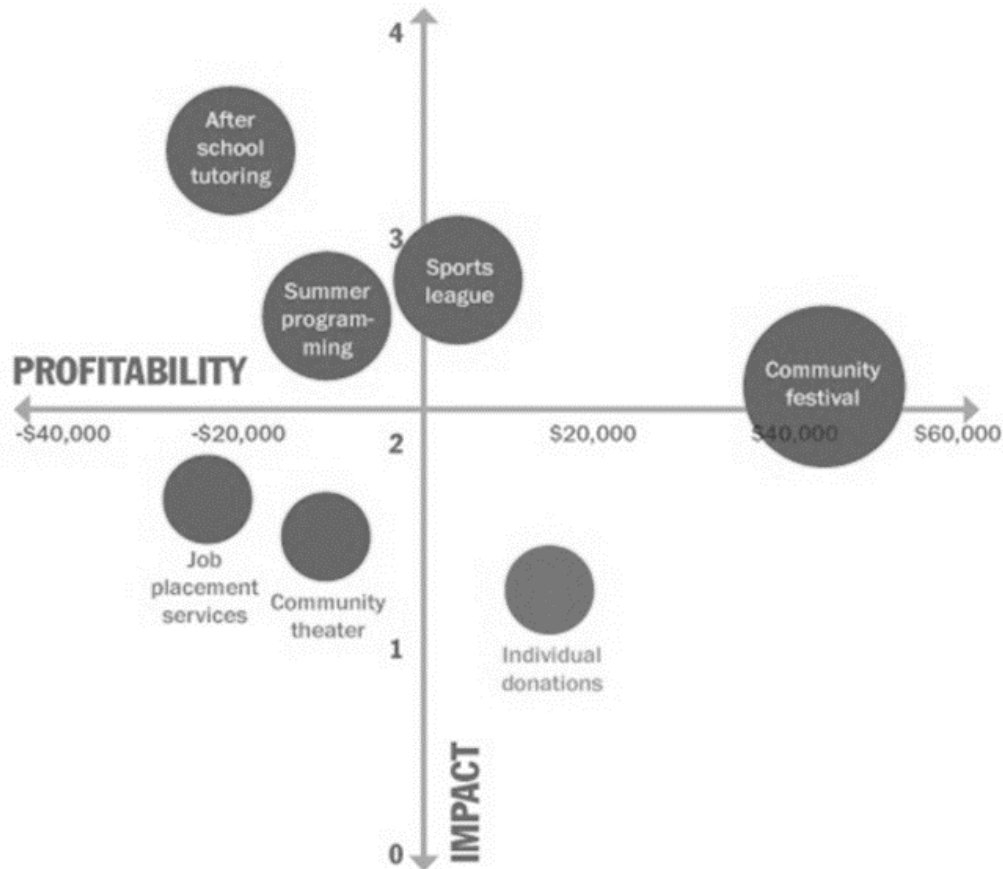
Figure 3**Matrix Map for a Community Center**

Figure 3. Matrix Map. Reprinted from *The Matrix Map: A Powerful Tool for Mission-Focused Nonprofits* by J. Bell & S. Zimmerman, 2014, retrieved from <https://nonprofitquarterly.org/> Copyright 2014 by *Nonprofit Quarterly*.

Creating a Matrix Map requires a way to assess the relative mission impact of initiatives and investments. While each organization will have different criteria for impact, non-profit management expert Jan Masaoka suggests an internal co-creation process among boards, management, and staff to develop measures along approximately 3-5 of the following: alignment with core mission (i.e., how closely a business line/project aligns with mission, vision, and core goals), excellence in execution (i.e. we

have evidence to suggest we have resources and capacity to deliver this business line/project with excellence), scale (i.e. the number of people a particular business line/project affects), depth (ie. how deep an intervention or contact this business line/project provides), building community or constituency (i.e. the extent this business line/project will contribute to ongoing movement or momentum on the issues most related to mission) and filling an important gap (i.e. the organization's work in this area is providing a service almost no one else does) (2010).

To obtain a singular, quantifiable social impact measure, Masaoka suggests assigning each of the identified measures a rating and then averaging those ratings. So, for example, Ed First could measure a new business opportunity or potential client project with the following scores: Alignment with Impact- 4, Excellence in Execution- 3, Scale- 2, Fills an Important Gap- 3. In that case, the mission impact score, according to Masaoka's recommendation, would be the average: 3.0. Having a clear, quantifiable measure for social impact, like Masaoka suggests, would allow Ed First, and other mission-driven organizations, to assess new opportunities and initiatives and measure the social impact of its current work.

Beyond how dual-bottom line organizations measure success, it is also critical to understand how current, successful organizations define and organize to deliver the blended value referenced earlier. Successful organizations, whether for-profit or non-profit, create a product or service around a specific job that customers hire a product or service to do. Clay Christensen and Michael Raynor proffer that any organization's "job-to-be-done" (JTBD) – regardless of its necessity for profit – is the critical foundation of building and sustaining a successful enterprise:

“Specifically, customers – people and companies – have ‘jobs’ that arise regularly and need to get done. When customers become aware of a job that they need to get done in their lives, they look around for a product or service that they can “hire” to get the job done. This is how customers experience life. Their thought processes originate with an awareness of needing to get something done, and then they set out to hire something or someone to do the job as effectively, conveniently and inexpensively as possible” (2003, p. 3).

Therefore, a key element of defining an organization’s JTBD is developing a deep understanding of the problem people are trying to solve and in what context.

That context is the foundation to situate and help define the problem consumers need solved or defined another way, the progress they are trying to make. Christensen and Raynor explain the relationship between context and consumer need:

“The functional, emotional and social dimensions of the jobs that customers need to get done constitute the circumstances in which they buy. In other words, the jobs that customers are trying to get done or the outcomes that they are trying to achieve constitute a circumstance-based categorization of markets. Companies that target their products at the circumstances in which customers find themselves, rather than at the customers themselves, are those that can launch predictably successful products. Put another way, the critical unit of analysis is the circumstance and not the customer” (2003, p. 3).

Put simply, a job is not just the product or service being produced. It is the progress that groups of individuals are trying to make when they find themselves in similar circumstances. There are a lot of phone options on the market, but people buy the iPhone

for more than the functionality of calling others or browsing the Internet. The iPhone purchase also has social and emotional dimensions for different groups of consumers and it is by understanding those that Apple successfully markets (and sells) its product in droves.

If an organization can define its jobs accurately, along social, emotional and functional dimensions, it can more accurately segment its markets and align their business model to deliver on those jobs well. The JTBD theory is particularly relevant to mission-driven, for-profit organizations in this regard because these organizations often speak to stakeholders through a social and emotional rationale related to their mission. Yet, these organizations also need to maintain operational or functional capacity as a business. A mission-driven, for-profit organization's JTBD can serve as the launch pad from which the organization can more accurately define its goal and priorities and allocate its resources, thus creating a path to optimize for profitability and impact.

While Christensen's research applying the JTBD framework draws heavily on the traditional for-profit sector, he also draws on successful dual-bottom line organizations as well. Southern New Hampshire University (SNHU) has been recognized as one of the most innovative colleges in America by U.S. News & World Report (2016) and is an example of JTBD that Christensen often cites. SNHU President Paul LeBlanc attended a working group at Harvard Business School wherein he was first introduced to the JTBD theory. He applied this lens to his own consumer base at the time. He found the JTBD very different among those who had (and might) find their way to SNHU. For instance, it became clearer that the emerging high-school graduate's needs were less aligned on the functional dimensions of their education (i.e. accreditation, course work), but very much

so on the social dimensions related to the “coming of age” experience. By way of contrast, at the time, students coming to their small online, distance learning program had a very different job with different needs. LeBlanc continues to invest to this day in the notion that students are “buying” education at SNHU for very different reasons. He and his team found unique, nuanced jobs that underserved populations needed to have done, including young students with children, mid-career students, and low-income students. As a result, LeBlanc and his team were (and still are) able to target resources and services where there was a greatest need and opportunity, while also closing 2016 with \$535 million in revenues and a \$10M surplus they have been able to reinvest back into the priorities of the organization (Christensen, Hall, David, & Duncan, 2016). Applying the JTBD theory to the K-12 and higher education could offer profound insights into what students are really hiring their institutions to do, thus allowing for greater alignment in those organizations meeting the true needs of students.

Bob Moesta, a foundational contributor to the JTBD theory, co-created a detailed methodology for identifying the JTBD of an organization. The methodology is undergirded by the belief that consumers do not buy products, brands, or services, but rather they hire products and services, and by extension their organizations, to perform a job for them (Moesta & Spiek, 2014). The JTBD methodology consists of a series of interviews with consumers who have recently hired and fired (or not hired) a particular product or service as well as that product’s or service’s competition. The results of these interviews are coded and analyzed using cluster analysis in order to find common patterns of behavior that are observable, not aspirational. The actual behavior is the source of the data collected. So, rather than asking consumers what they think they want,

the idea is to study choices consumers have actually made, deeply understanding the situation surrounding their need to buy and what the actual considerations were in their final decision-making. Therefore, the criteria identified are inclusive of the trade-offs consumers make, allowing organizations to more specifically identify what is important to consumers and how they behave versus how they say they will behave (Moesta, 2015).

The JTBD theory and the methodology can be applied to any situation where an individual is making a choice to engage with an organization. Whether that engagement is defined as buying a product or offering time as a volunteer, the organization is performing an important function for that individual. Therefore, the methodology can be applied to organizations in any quadrant of the social entrepreneurship matrix.

In the case of Ed First, the central guiding question for the application of JTBD methodology is: What is the progress that individuals and their organizations are trying to make (and in what particular circumstance) when they hire Ed First? Understanding the functional, emotional, and social needs of their current and potential customers will give the organization a greater line of sight into how best to align or re-align parts of its business to deliver products and services along those dimensions.

For example, SNHU recognized that traditionally underserved populations (i.e. first generation college students, low-income students) exponentially felt the barriers presented by the time-consuming and complex process of financial aid and admissions applications. Because they had a nuanced understanding of the job – the functional, emotional and social needs – of particular groups of students, SNHU was able to invest creatively and substantively in helping those students navigate those complex processes.

The SNHU example is also illustrative of how organizations align themselves internally to deliver the highest possible value. As Christensen writes, “Centering the value proposition of a business model on a job-to-be-done typically makes clear the type and extent of integration and other parts of the business model that is required to do the job well” (2015). As shown in Figure 4, a business model consists of: the value proposition (or job), the profit formula, the resources, and the processes of an organization.

Figure 4

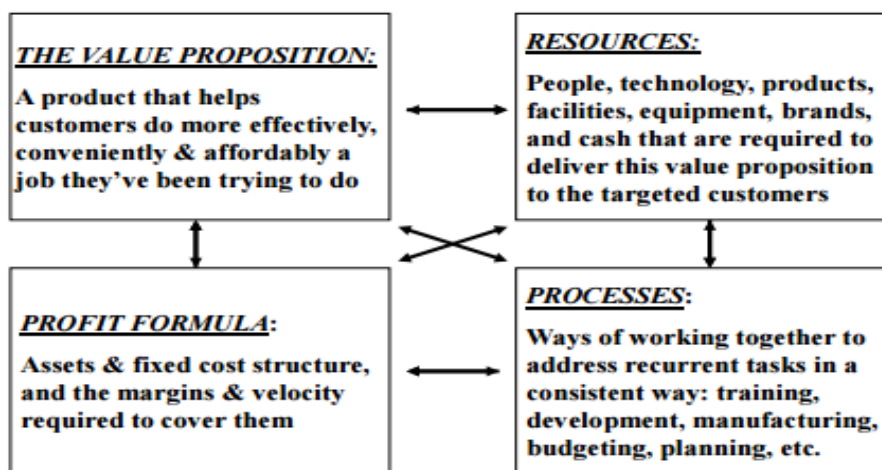
Exhibit 1: What Is a Business Model?

Figure 4. What is a Business Model?. Reprinted from What are Business Models, and How Are They Built? by C. Christensen & M. Johnson, 2009, retrieved from <http://www.thefgi.net/wp-content/uploads/2010/09/What-is-a-Business-Model.pdf>
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In the case of mission-driven, for-profit organizations, their value proposition is neither purely economic nor purely for social benefit. Their value lies at the intersection of both. The Blended Value Proposition, measured by the BROI, asserts “true value is non-divisible, consisting of a blend of economic and social outcomes” (Emerson, 2003, p. 36). In order for a mission-driven for-profit to deliver on this blended value proposition for clients, an organization needs to not only clarify its job, but also identify how the other parts of the business model – the profit formula, resources and processes – are aligned to deliver on that job. By doing the jobs that its customers need more precisely, an organization like Ed First can optimize for the financials and social impact goals it establishes, assuming it is able to measure and track both.

Strategies for effectively leading organizational change

Enterprises going through some shift or evolution in business processes, structure or culture are said to be in a state of organizational change. The punctuated equilibrium model of organizational transformation is a prominent framework for explaining major changes in an organization's functions (Romanelli and Tushman, 1994). With foundations in paleontology and species evolution, punctuated equilibrium theory suggests organizations and the individual people within them spend most of their time in a period of stasis with incremental change occurring over time. These periods of stasis are interrupted by occasional punctuated episodes in which the need for change overrides the barriers to change, which often happen where there are changes in the environment. One study of organizational transformation showed that:

“(1) a large majority of organizational transformations were accomplished via rapid and discontinuous change over most or all domains of organizational activity, (2) small changes in strategies, structures, and power distributions did not accumulate to produce fundamental transformations, and (3) major environmental changes and chief executive officer succession influenced transformations”
(Romanelli and Tushman, 1994, p. 1141).

This research illuminates the need to understand what historical and current shifts have happened in the public education sector as well as education consulting marketplace. The punctuated equilibrium framework suggests that significant organizational change occurs as a result of major environmental shifts and/or shifts in executive leadership, not as a result of incremental changes in strategies and structures. Therefore, if an organization

seeks a significant transformation, seizing opportunities that arise because of a shift in the organizational environment or a shift in leadership are critical.

Chip and Dan Heath's widely recognized book on change management, *Switch: How to Change Things When Change is Hard*, codifies a substantial body of change management research into a single framework: Rider and elephant (Heath & Heath, 2011). The framework suggests that sustainable individual behavior change will occur only when two contrasting and competing systems—the *rational mind* (“the rider”) and the *emotional mind* (“the elephant”)—are addressed both individually and in concert with one another.

Additionally, change management practices (CMPs) include a variety of staged interventions that when executed in a particular way and in a particular order lead to shifts in organizational and individual practices. The most widely recognized change management practices recommended for effective organizational change are fairly consistent. One study of well-known change management frameworks found common characteristics related to the planning for change (i.e. diagnosis, implementation plan development, clarifying the messages for what the change is and why it is necessary) and the actual implementation of change (i.e. visible, vocal leadership invested in the change, building skill and will of employees and the alignment of compensation and incentive systems to the change) (Raineri, 2011). According to Kanter (2001), too often those who are leading or participating in change either do not know or do not apply this knowledge; they rely more on “common sense,” which actually leads to an inefficient, ineffective or chaotic process for the organization.

Most of the research done on organizational change management has been theoretical and case-based in nature; thus, there is a gap between the theory and practice of change management literature. In Raineri's empirical research study on CMPs (2011), he found that organizations more frequently use CMPs more closely aligned with preparation phases rather than more closely related to the implementation phases. Relatedly, he found little distinction in the frameworks to actions that explicitly call out the role and intended impact on change strategists (those who plan the change program) and change receptors (the staff who the change program is designed to impact). Lastly, he found that while the use of change management practices had a positive relationship with the perceived accomplishment of the activities in the specific change program, they had little to no impact on how employees perceived the overall success of the organization. This means employees might have participated in the change and saw that they were accomplishing the tasks in a specific change management project plan, but they did not believe those activities were yielding organizational outcomes that were demonstrably different, even if in reality there were.

While research and theory would suggest change management frameworks can be useful in guiding organizational change management, undergirding these efforts needs to be disciplined, consistent attention applied to: 1.) planning as well as implementation 2.) staff leading as well as participating in the organizational change and 3.) clarifying and communicating the programmatic as well as organizational outcomes (expected and achieved) as a result of change management efforts.

Whether in periods of change or stasis, the role of people to make an organization go is critical. In many profit-driven organizations, there is emphasis on the suppliers and

buyers with little attention to the employees, assuming the value is determined by external forces. Researchers of the supply-value chain of for-profit organizations, mission-driven or not, suggest that perhaps organizations need to focus more on serving the internal employee as a way to create value for customers rather than exclusively on the supplier-buyer interaction (Hult, et al, 2000).

Creating value for employees, particularly in a mission-driven industry like education, can translate into value for the clients, a philosophy Education First openly ascribes to. In a 5-year research study to better understand why a select group of service firms outperformed others, Heskett, Sasser, and Schlesinger found that customer loyalty and satisfaction, as well as employee loyalty, was linked to company profit and growth (1997). Moreover, they found the relationships between profit, customer loyalty, customer satisfaction, and employee loyalty to be mutually reinforcing. In other words, satisfied customers contribute to employee satisfaction and vice versa, which leads to higher profit, with the value being translated to the customer. Assuming that the client and the employee both, to some degree, also are driven by social impact, engaging an organization that serves a dual-bottom line could also serve the mutually reinforcing pattern cited by Heskett, Sasser and Schlesinger.

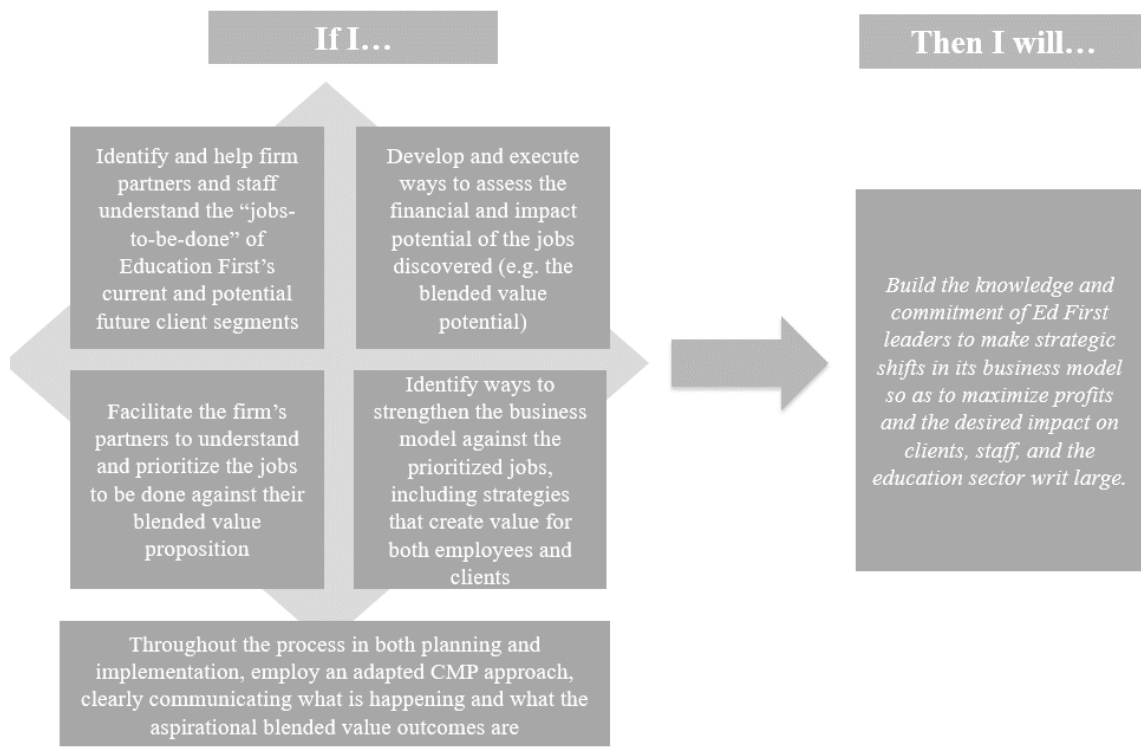
Optimizing for mission and profits by organizations like Ed First will be a product of harnessing this reciprocal value. Southwest Airlines, while not necessarily focused on social impact, does engineer its priorities around both profits and high-quality service. Southwest's success and competitive advantage is a direct result of having systems and a process to identify and foster employee satisfaction and convert that satisfaction into improved and sustained high-quality performance and thus greater organizational

capabilities. The organization ultimately captures greater profits as a result of its cost advantage and superior performance, generated by a deep understanding of the value chain in its service-dependent organization (Hallowell, 1996). Thus, an interesting question for future exploration is not only what the JTBD of the organization is for clients, but also what is the JTBD of the organization for its current or potential staff? Understanding both would allow for an organization's leaders to design process and allocate resources to optimize for reciprocal value.

Theory of Action

Taking findings from business and social entrepreneurship research and related examples from successful industries unearthed through this RKA, my theory of how I can support Ed First to define, produce and optimize value to simultaneously improve profitability and social impact is as follows:

Strategic Insights Project Theory of Action



In other words, through these efforts, I will have provided Ed First leaders with the foundational knowledge and processes they need to be in a virtuous cycle of maximizing profits and mission around their unique jobs-to-be-done.

Description

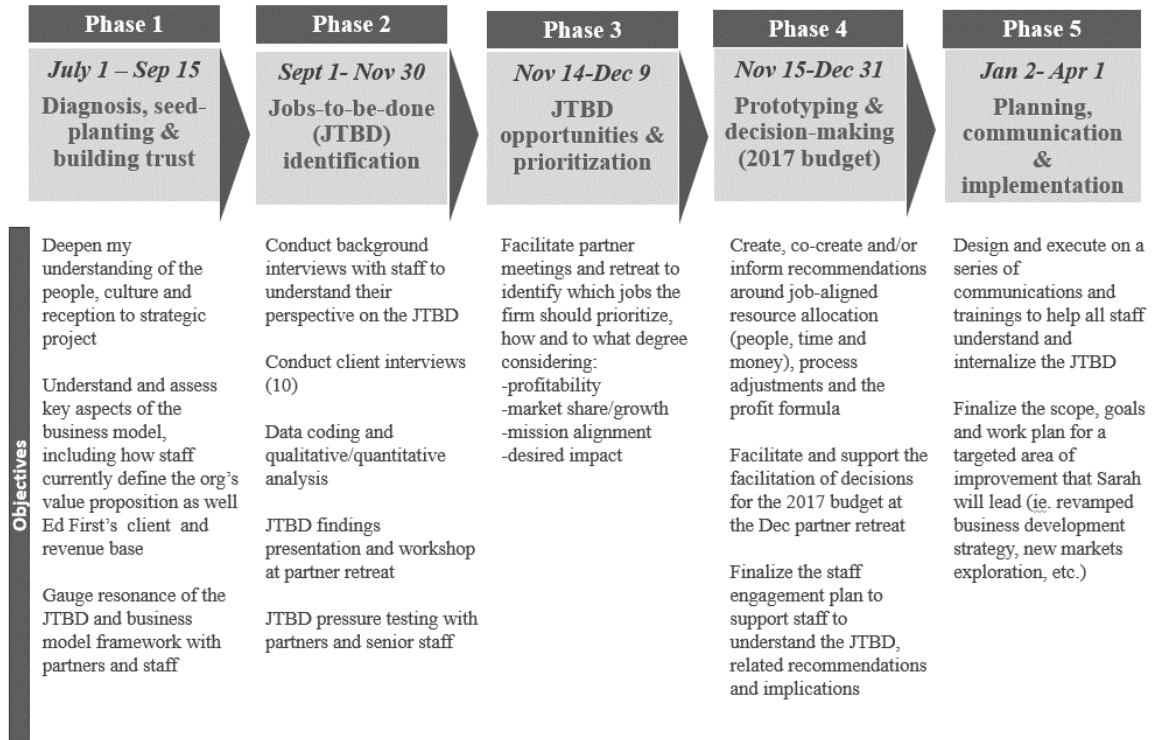
During my residency, I reported to the managing partner, Susan Bodary, whose role was to manage the strategic direction of the organization alongside the three other partners, as well as oversee and manage the day-to-day operations of the firm. Prior to my official start in July 2016, the managing partner had introduced me and a high-level description of my role as a Harvard resident to the firm, which included my strategic project and also spending 25% (approximately 12 hours weekly) of my time on client-facing work.

As noted in the Introduction, the conditions surrounding the organization presented a ripe opportunity for changes to Ed First's strategic direction and business model. The planning and early execution of my project began relatively quickly, as the appetite to advance the firm's strategic direction was high and a significant amount of leeway and access was afforded to me by the managing partner.

The Strategic Insights Project Objectives, Phases, Timeline and Activities

Strategic Insights Project Overview

Overarching objective: *Build the knowledge and commitment of Ed First leaders to make strategic shifts in its business model so as to maximize profits and the desired impact on clients, staff, and the education sector writ large.*



Phase 1: Diagnosing, seed-planting and building trust (July 1-September 15, 2016)

Deepen my understanding of the people and culture of Ed First and possible reception of strategic project

In Heifetz and Linksy's adaptive leadership framework, they describe "the dance floor" for a leader, where he/she is in action-mode and only able to see what is in the immediate surrounding (2002). "Getting on the balcony" is the process by which a leader needs to step back from the interactions and engagements in order to assess the context.

Through this framework, I knew the early parts of my residency would include doing the technical work on the dance floor and also making space to reflect on the interactions and reactions of others to better understand the adaptive challenges of my strategic project. I began the project overall with a series of Heifetz-inspired questions that I kept above my desk at eye-level so I would have them in sight during my daily work and virtual engagements: What is the technical work, and what is the adaptive work? What roles do individuals hold for the group, and what roles are others holding? What is being said and what is not being said in this interaction? How is authority being used in this interaction and to what purpose? (Heifetz & Linsky, 1994).

As part of my onboarding, I spent over 15 hours in one-on-one conversations with a diverse group of staff to better understand their felt experience in the organization. I spent a lot of time listening in these meetings and countless others in those first two months, offering very little in the way of opinion or analysis, unless it was factual in nature. I often assumed the role of formal or informal facilitator in conversations others were having. Heifetz's model calls for leaders to "give the work back to the people" (1994, p. 123) so during the early months (and throughout the residency) I used my position to facilitate the understanding and decision-making of others versus applying my analysis for direct recommendations meant to simply be adopted.

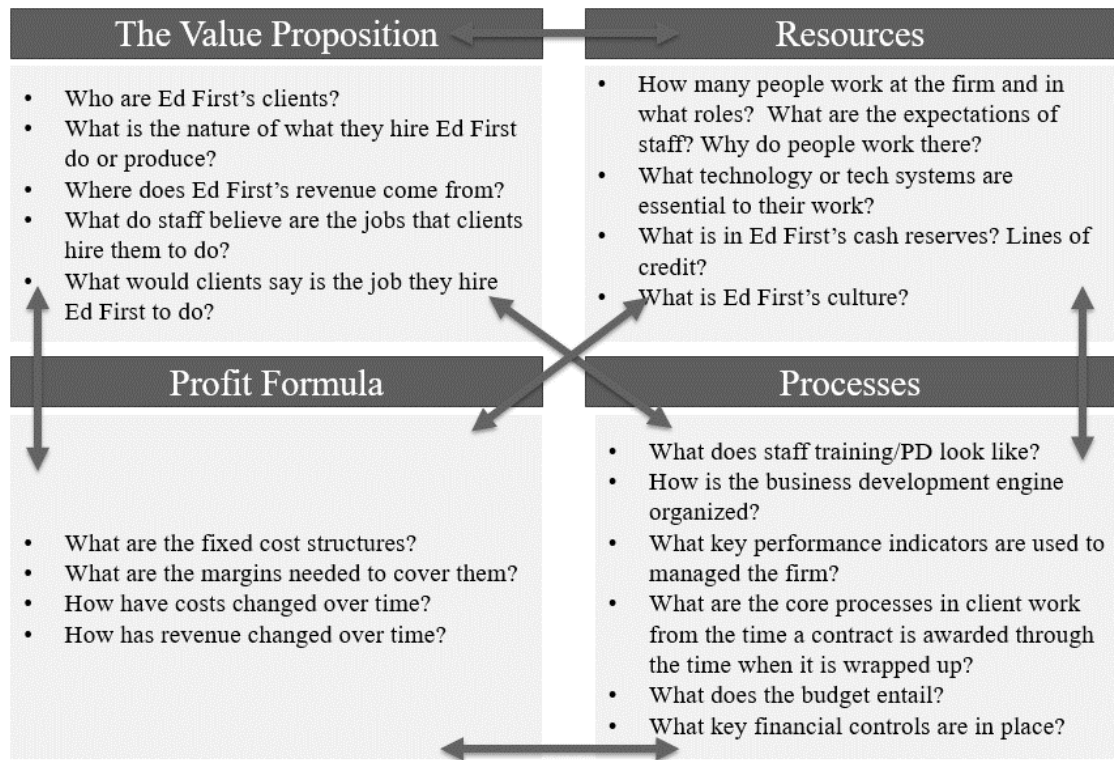
During the first phase, I was also listening for how staff were talking about the project to better understand how welcome changes to the business model would be. In the first three weeks, I heard phrases like "Sarah's work" or "the Harvard project" more than once, and approached with the assumption that if my strategic project was going to live and breathe beyond me and help the whole organization move forward, it was going

to need to be seen as the organization's work and not my own. By the end of the first month, I had developed and worked through a plan to brand this work, giving it a title that other staff members helped me produce: "The Strategic Insights Project." I mapped out avenues for communicating progress regularly on the project with staff: namely all-staff calls, the all-staff bulletins, the weekly partner calls, and ongoing one-on-one conversations related to the project. This title and approach was designed to foster organizational ownership.

Understand and assess key aspects of the business model, including how staff currently define the organization's value proposition as well Ed First's client and revenue base

Already having a hypothesis that the strategic project would be organized around the JTBD and Christensen's business model theories, my early learning agenda was organized around the business model framework (shown in Figure 4 in the Review of Knowledge for Action section of this Capstone). Below is an overview of my learning agenda aligned with Christensen's business model framework.

Strategic Insights Project Learning Agenda



The first question I started with was simple, but big- *Who are Ed First's clients?* I engaged in one-on-one conversations with members of the client-facing consulting staff and internal staff like the Chief Financial Officer (CFO). The answers received from staff were quite different from one another with some responding with types of organizations (e.g. philanthropy) while others responses focused on the kinds of services that Ed First provides (e.g., strategic planning). When probed specifically around what they believed to be Ed First's "sweet spot" the answers were equally variable.

While the perception of staff was illuminating, I sought a factual answer to this question trying to understand where the largest number of projects and the most revenue came from. With input from the CFO, Deputy CFO, and additional staff members, I drafted a list of variables that organized my search, building on previous analysis that a

client-facing staff member had begun but not fully completed, to better understand the nature of Ed First's business. The variables were: contract size range (e.g., \$0-\$10K, \$20-\$40K, etc.), client organizational type (e.g., foundation, state agency, etc.), Ed First focus areas (e.g., outstanding educators, engaged students, etc.), geography, repeat business, win type (e.g., won through request for proposal (RFP)), contract duration (e.g., <3 months, 3-6 months, etc.).

After organizing and analyzing the data to provide a basic taxonomy of its client and revenue base, I captured how Ed First's portfolio cut along a number of the dimensions listed above. Three clear insights emerged during this process:

- 1.) The analysis I provided, while attempted, had not been completed before, in part because the data systems had not been in place to consistently mine the information and their healthy financial position did not demand an emphasis on strong, predictive analytics.
- 2.) The firm did not have a clear, specific articulation of what an ideal client portfolio would be along any of these variables, nor clarity or alignment on how to define or measure impact.
- 3.) While much of the data (although in different spreadsheets and files) was available to all staff on the firm's internal system, many staff's understanding of Ed First's core business was a reflection of their own day-to-day experience, limited to the clients they had worked with, and not reflective of what the data bore out.

This work began as an exercise in onboarding and as a diagnostic to understand the current value proposition understood firm-wide, but what it unearthed was that a

consistent definition of the firm's value proposition (or stated more simply what Ed First is best at doing) did not exist among the partners or staff. This presented an opportunity to surface the inconsistencies among staff and to increase the awareness of partners and staff regarding the origins of their current business. A few weeks later, I presented the data and facilitated a conversation among partners with the objective of priming the work to come: making decisions around the organization's JTBD and what partners themselves wanted the firm to prioritize in the coming years. I facilitated a similar conversation a few weeks later with all staff at the firm's bi-annual, in-person conference.

Gauge resonance of the JTBD and business model framework with partners and staff

In addition to gauging the adaptive challenge and assessing the business model, I also needed to test the resonance of the JTBD and business theories, as they were central organizing frameworks and language I planned to utilize. The first partner call I joined was a few weeks before my official start date. I shared the JTBD theory reading and a short Harvard Business Review article on the topic as pre-reading. In this case, I shared an overview of the theory, its power to unearth an organization's value proposition and how we might apply it at Ed First through the strategic project. The questions that partners posed on that call served as a rich source of data to better understand their overtly stated and potentially hidden perspectives about their own organization and my approach to the strategic project. For example, questions surfaced early on about whether more than 10 interviews could be conducted and how it was possible to deeply understand their business in just 10 interviews. What I heard in these questions was

skepticism and a desire for this process to reflect all (and not a portion) of the business and the hope to honor the organization the partners and the others had helped to build.

In a subsequent series of partner calls, the partner retreat and the all-staff retreat, I followed a similar pattern, sharing a short article or theory reading as pre-reading, presenting the high-level features of the theory and frameworks and gauging reaction and resonance in partner and staff questions and direct feedback. Over a series of engagements, I learned the JTBD framework, in particular, had a great deal of resonance with staff that was evidenced not just in their observable engagement and formal feedback surveys, but also in follow-up emails about the application of the framework to their client work and verbal references of the “jobs-to-be-done” project by partners and staff. For example, in early September, I co-presented the first session of Ed First’s bi-annual, in-person retreat, which included early findings from the Strategic Insights Project and an overview of the JTBD framework. Staff feedback from these engagements was overwhelmingly positive.

Phase 2: JTBD Identification (September 1- November 30, 2016)

The objectives of this phase were to collect, analyze, and communicate the data gathered from Ed First clients in order to clearly understand those clients’ jobs-to-be-done, or “...the progress that an individual seeks in a given circumstance” (Christensen, Hall, Dillon, and Duncan, 2016, p. 27). This phase was guided by the JTBD Methodology authored by Bob Moesta (see Appendix A).

Preparation

Through a conversation I facilitated, partners made a decision not to narrow the JTBD work on particular focus area within the firm, like Engaged Students or Effective Organization and Investments. Ultimately, we decided that the central question would encompass the totality of the firm's work: What is the job that clients are hiring (or firing) Ed First to do for them?

The methodology suggests engaging in at least 10 interviews with a diverse set of clients, with diversity being a contextual term that should be defined in relation to an organization's current client base. For Ed First, the diversity criteria was developed with partner and staff input and included dimensions such as: won versus lost clients (at least 3), client type, contract size, and gender/race of client (for full list of diversity criteria see Appendix B). From there, again with partner guidance and input from other senior Ed First staff members, the list of clients to be interviewed was finalized.

In preparation for each of the client interviews, I reviewed the deliverables associated with each project (e.g. the proposals, the presentation decks or plans, etc.) to orient myself to the nature of the work. I had a one-on-one call with the lead Ed First staff member assigned to the project or project proposal (for those that were lost). The interviews with staff members were not just to gauge what they thought was the JTBD of the client, but also to build trust by asking how else I might be helpful in gathering data from clients they might personally find useful. On the whole, Ed First staff were eager to have me conduct the interviews because they were enthusiastic about the chance to get direct feedback about their work from clients. Their enthusiasm revealed that systematically collecting and using client feedback is not a regular practice at the project team and at the firm level.

Data collection, analysis and synthesis

I then conducted and recorded hour-long interviews with 11 clients constructing a timeline of the events to better understand the context and events that led up to the event of deciding to hire (or not to hire) Ed First (see Appendix C for a visual representation of the timeline used to guide data collection). Following the JTBD interview protocol, a portion of the interview was also devoted to understanding what happened if they did hire Ed First and how satisfied they were with the outcomes. This part of the interview provides the data to understand the progress the client was trying to make and the circumstance they found themselves in. I started most of the interviews with the question “Before we talk about Ed First, tell me more about when you first thought you might need outside support like that of a consultant?” I followed with additional probing questions to understand what motivated them to seek consultant support generally and what specifically caused them to hire or not to hire Ed First.

In the interviews, each person shared one or more “stories” which essentially were different decisions and moments in time, which serve as individual data points in the analysis that followed. In all, across 11 interviews, I gathered 19 stories that served as the core data set.

Then, with the support of Bob Moesta, the author of *The Jobs-to-be-Done Handbook: Practical techniques for improving your application of JTBD*, I conducted the pattern analysis, which involves organizing the data into themes, coding the stories within each interview and using some statistical analysis to identify commonalities across the data gathered. From this analysis, five story groupings emerged and thus five jobs.

The process from this point forward was more about estimation and less about exact science. Stepping back from the quantitative analysis, I drafted a series of questions related to the JTBD definition of progress, person and circumstance. I applied these questions, adapted from questions posed in Christensen's book on the JTBD theory, *Competing Against Luck* (2016), to each grouping that emerged from the quantitative data analysis:

- 1.) Circumstance- How would I describe the circumstance that folks across this group of stories found themselves in? What made the reason for needing a consultant similar across these groups? How are they different or similar from the other story groupings' circumstances?
- 2.) Progress-What is it functionally that this group of people needed done? Why and how did they need that thing done? What makes their needs similar or different from the other story groupings' needs?
- 3.) Person- How would I describe what socially or emotionally may have been true across the individuals within this group? What makes their needs similar or different from the other story groupings' needs?

The goal was not to create the title or catchphrase for the job, but to define the contours well enough so that the descriptors for each of the five groupings created enough differentiation for partners so they could locate the firm's projects cleanly in one of the five groups. As Moesta said in one of our training sessions, "context creates value; contrast creates meaning" (personal communication, November 2016). From this additional qualitative analysis, I created detailed JTBD summaries for each of the jobs

uncovered in preparation for the big reveal that would happen at the partner retreat a week later.

Presentation and discussion

Phase 2 was scheduled to end mid-October with the culminating activity being a presentation of the JTBD analysis and workshop to facilitate meaning-making and further evolution of the JTBD language. The workshop and discussion took place over approximately six hours across two-day virtual partner retreat. Two weeks in advance of the retreat, I sent the partners the pre-work, which included listening to the audio recording of three client interviews.

Again listening for resonance as well as monitoring the level of engagement in the pre-work and the conversation, I listened to track how much ownership partners felt over the process and how much connection they felt to the findings. Rich discussion ensued on Day 1 and partners, even after a long day of virtual participation, each agreed to try their own hand at synthesizing the job definitions even further between the first and second day. However, I had assumed that the “jobs” would have been decided on day one or day two of the retreat. Based on partners’ energy to continue to refine the definitions and the fact that we could not end the day with consensus, it was clear from the first day’s outcomes and the conversation that extended into Day 2 that much more conversation would be needed.

Over the next week, I engaged one-on-one with partners to further workshop the JTBD definitions and engaged a group of senior staff members to provide feedback on them as well. During a partner call a week later, we did one last review of the JTBD definitions (see below) and were finally ready to move to the phase in which we would

prioritize the JTBD from a financial and a mission-perspective and determine which parts of the business model would need to evolve to better deliver on that job for clients.

Ed First Draft Jobs-to-be-done (*draft as of November 2016*)

Job 1	Job 2	Job 3	Job 4	Job 5
Hired Gun, Get it Done for Me: Develop and execute a plan (within my budget) for my identified (but not always) high-risk or complicated piece of work; get the work done in a way that allows me/the org to emerge confidently and/or politically intact on the other side	Help Me Innovate or Gain a New or Fresh Perspective: Help me have a fresh perspective and new way of viewing, framing, articulating a challenge or issue; learning and positioning outside-the-box solutions	Co-Create and Help Capacity–Build to Solve a Problem: Help me design and solve a complicated piece of work, build confidence in the solution (through evidence, research, or your credibility) and bring the people in my system/org along in the process. May include the co-design and launch of implementation efforts as well.	Help Facilitate and/or Advise Through Complex Decision-Making: Advise individuals or facilitate different points of view, knowledge and experience across divergent intra- or inter-organizational stakeholder groups to make high-stakes decisions and/or create aligned solutions that are often unknown	Help Accelerate the Learning and/or Networking in the Field: Facilitate (through product or process) the rapid sharing of perspective, knowledge and experience within or across individuals, peer orgs or systems to build capacity and to help get more bang for the buck on invested resources

Phase 3: JTBD Opportunities and Prioritization (November 14–December 9, 2016)

During this phase, I conducted analysis to reflect back to partners how their portfolio had been distributed historically across the different jobs and what potential impact each job might have on clients and the field writ large. For example, analysis included what percent of revenue had come from the first job versus the second (see above). The analysis also included a description of what the implicit theory of action was that Ed First would be prescribing to if it assumed each of the JTBD identified (see below). The hope in engaging around the descriptions below was to spur reflection and discussion around what types of work they believe most closely aligns with their espoused mission.

Each JTBD has an implicit theory of action behind it, which has the greatest potential for achieving your mission and vision?

Job 1	Job 2	Job 3	Job 4	Job 5
Hired Gun, Get it Done for Me: Develop and execute a plan (within my budget) for my identified (but not always) high-risk or complicated piece of work; get the work done in a way that allows me/the org to emerge confidently and/or politically intact on the other side	Help Me Innovate or Gain a New or Fresh Perspective: Help me have a fresh perspective and new way of viewing, framing, articulating a challenge or issue; learning and positioning outside-the-box solutions	Co-Create and Help Capacity–Build to Solve a Problem: Help me design and solve a complicated piece of work, build confidence in the solution (through evidence, research, or your credibility) and bring the people in my system/org along in the process. May include the co-design and launch of implementation efforts as well.	Help Facilitate and/or Advise Through Complex Decision-Making: Advise individuals or facilitate different points of view, knowledge and experience across divergent intra- or inter-organizational stakeholder groups to make high-stakes decisions and/or create aligned solutions that are often unknown	Help Accelerate the Learning and/or Networking in the Field: Facilitate (through product or process) the rapid sharing of perspective, knowledge and experience within or across individuals, peer orgs or systems to build capacity and to help get more bang for the buck on invested resources
THEORIES OF ACTION				
Ideas in the field are good. Tight implementation can help achieve impact.	Change will happen by bringing forward a new way of thinking or an unheard perspective to the table.	For outcomes to be realized, ideas need to be more solidly designed from the get go, in partnership w/ clients, followed by tight implementation.	Outcomes can be achieved by facilitating or influencing the individual or collective perspective of powerful stakeholders or organizations.	Outcomes can be realized by arming and aligning like-orgs to operate from the same working knowledge, perspective and beliefs.

Below are the types of analytic questions that were applied by Ed First partners to prioritize the jobs along the dimensions of profit, impact and the degree of change it would take to improve the organizational capacity to deliver on certain jobs.

Financial Goals	Impact Goals	Current Alignment to Jobs
• Which jobs have had the largest contract awards? • Which have been the most profitable? • Where is there the biggest opportunity for market growth (i.e. less competitors or non-consumption)? • Which jobs are more likely to lead to larger contracts or repeat business down the line and in what way?	• Which jobs represent a mission-aligned Theory of Action that you think has the greatest likelihood of making the change you seek in closing achievement gaps?	• Where are your resources, processes and priorities (RPPs) most aligned to jobs already? In other words, when you consider staff skills and interest, the resources and collateral and your internal processes which jobs are you set up to do best?

I had originally assumed Phase 2 would take a week or two. In the end, this phase ended up taking over a month. I had to provide more robust financial and organizational analysis than I had originally planned for and facilitated more conversations over a longer period of time to work through the outstanding concerns partners had with the language used to describe the JTBD.

Phase 4: Prototyping and Decision-making (November 15-December 31, 2016)

At the tail end of Phase 2 and during Phase 3, I was also engaging with the firm's managing partner, the firm's deputy CFO who was charged with leading the budget process, and the firm's director of talent to draft early recommendations related to the 2017 budget. This phase expanded to include the concrete recommendations for how the jobs might need to be prioritized if optimizing for impact and profit as well as how those JTBD would translate into specific resource investments and process improvements to be incorporated into the 2017 budget (to be adopted by December 31, 2016). The recommendations were undergirded by financial analysis as well as analysis on the

potential social impact on the sector which I circulated in advance of the December retreat focused on the development of the near-final 2017 budget. The budget timeline did support a level of urgency around the Strategic Insights Project, but the pressure also instigated some anxiety among partners that decisions would be made before the implications and opportunities of those decisions had fully been explored.

Coming out of the December retreat, partners emerged with stated goals related to how the JTBD would distribute across the portfolio:

Education First's Final JBTD Definitions

85% of Ed First's portfolio			15% of Ed First's portfolio
Co-Creator	Facilitator / Politics Navigator	Learning & Network Accelerator	Fresh Perspective
Help me design and solve a complicated piece of work, build confidence in the solution (through evidence, research, or your credibility) and bring people in my system/org along in it. May include together figuring out how to implement well	Advise individuals or facilitate different points of view, knowledge and experience across divergent intra- or inter-organizational stakeholder groups to make high-stakes decisions and/or create aligned solutions that are often unknown	Facilitate, through product or process, the rapid sharing of perspective, knowledge and experience within or across individuals, peer orgs or systems to build capacity and to help get more bang for the buck on invested resources	Help me have a fresh perspective and new way of viewing, framing, articulating a challenge or issue; learning and positioning outside-the-box solutions
			Hired Guns
			Develop and execute a plan (within my budget) for my identified usually (but not always) high-risk or complicated piece of work; get the work done in a way that allows me/the org to emerge confidently/ politically intact on the other side

Additionally, the Strategic Insights analysis, aimed at identifying strengths and areas of improvement in the firm’s business model, served as a foundation for discussions that led to partner making decisions about the firm’s priorities for 2017 and the resource (people, time and money) investments to achieve both.

Education First’s 2017 Firm Priorities



Phase 5: Planning, Communication and Implementation (January 2-April 1, 2017)

Design and execute on a series of communications and trainings to help all staff understand and internalize the JTBD

Following the December partner retreat, I scoped a plan to engage the rest of the organization in the JTBD findings (see Appendix D). The managing partner offered feedback that the rollout was “too much, too soon” and that the staging had to align to where the change in the organization was needed most. As a result, much of the plan I had developed was put on hold.

We did agree that beginning to engage senior members of the staff who lead business development and members of the internal support team was necessary because their jobs were to create the systems and supports for the client-facing team. I hosted a series of three group calls (approximately six to eight people on each) to take them through the JTBD analysis. All of these calls fell flat, as evidenced by the silence in the meetings and informal feedback gathered from participants that the information was dense and did not feel connected to their day-to-day work. Around this same time I had a few informal lunches and virtual meetings with staff at the firm, during which I shared select anecdotes from the JTBD analysis, specifically those that spoke to their interest. The engagement between these meetings and the large group calls was starkly different. Staff in the informal settings were energized and inspired and eager to learn more. This disconnect was a turning point in my approach to sharing the JTBD findings with others, in that I understood for the JTBD analysis to have legs, staff needed space to engage with it and use it in the design, planning and implementation of their own work. This pivot will be discussed more in the Analysis section of this Capstone.

Finalize the scope, goals and work plan for a targeted area of improvement that Sarah will lead (e.g., revamped business development strategy, new markets exploration, etc.)

Additionally, based on budget recommendations presented to and adopted by partners at the December retreat, staffing and money for business development in 2017 were allocated and I was charged with convening the top sellers in the firm to help re-imagine Ed First's business development efforts. This included a plan to both identify what markets sellers want to target as well as the infrastructure to support more efficient and effective selling. In the month of January, I designed and facilitated three, one-hour

calls to ground the team in historical revenue and portfolio data, provide a deeper dive into the JTBD analysis and facilitate a discussion on how the firm's goals related to equity and impact. I also conducted one-on-one interviews with each of the firm's top sellers to better understand what they saw as the biggest challenges and opportunities in business development and to understand their own mindset around selling. In February, the firm's top ten sellers convened in San Francisco to co-create the business development priorities for 2017-2018 and co-design the new business development processes and infrastructure for 2017 (see Appendix E to review that meeting's agenda).

While not a part of this Capstone, I continued to facilitate partner meetings in January and February designed to help partners make collective decisions on which business processes to prioritize, and specifically what outcomes and process improvements they sought in 2017 and beyond. Relatedly, I engaged with members of the internal team (whose roles were re-organized as a result of the 2017 budget) to plan their work in relation to the 2017 firm priorities and better integrate their efforts with one another. As goals and plans are developed by the internal team, I continue to infuse the JTBD analysis and other historical data as a primary input for consideration in their work.

Evidence

I collected evidence throughout my strategic project that both helped me to understand the degree to which I was executing on the plan I had set (the outputs) as well as what impact those actions were having (the outcomes). The table below summarizes the actions and results aligned with the “if” portion of my theory of action and those outcomes aligned with the “then.” In the section following this one, I will go into further detail about how and why these output and outcomes resulted.

Theory of action “If” statements	Progress to date	Major results
Identify and help others to understand the “JTBD” of Ed First’s current and potential future client segments		• Ten client interviews conducted and analyzed • JTBD definitions workshopped with firm partners and senior staff (<i>note: this took about 2.5x as long as predicted in the original project plan estimates</i>) • Presented and facilitated discussions with partners at their August partner retreat to better understand their current and historical portfolio with regards to who their clients have been and where their revenue has come from
Develop and execute ways to assess the financial and impact potential of the jobs discovered (e.g. the blended value potential)		• Conducted quantitative and qualitative data analysis showing which jobs were: more profitable, presented opportunities for market growth and/or repeat business, represent a mission-aligned theory of action with the potential to close achievement gaps and most aligned to the organization’s current resources, processes and priorities (RPPs) • <i>Did not successfully develop ways to fully measure or assess impact</i>
Facilitate the firm’s partners to understand and prioritize the jobs to be done against their blended value proposition		• Presented and facilitated discussions with partners at their October and December partner retreats to understand and evolve the jobs as well as make decisions about what the ideal job distribution within its portfolio for 2017 to optimize for impact, profit and sustainability • Conducted two or three one-on-one meetings with each partner through September and October to solicit feedback, questions and confidence in the JTBD process to inform their business model • Designed and facilitated a one-and-a-half day convening with top sellers to re-design their

		business development engine in the context of the JTBD • <i>Heavier emphasis placed on the financial and market growth potential (vs. impact) in the prioritization of JTBD</i>
Identify ways to strengthen the business model against the prioritized jobs, including strategies that create value for both employees and clients		• Conducted and presented analysis on key parts of the business model at the September retreat from an efficiency standpoint • Developed, presented and facilitated discussions around recommendations to improve the business model and its ability to deliver on the JTBD • Consulted with the Director of Human Capital to understand the JTBD of client-facing staff, who leveraged that data and the client JTBD analysis to restructure the roles on the internal team • <i>Did not successfully develop ways to measure or assess impact</i>
Throughout the process in both planning and implementation, employ a change management approach, making explicit connections between change efforts and the potential blended value potential		• Recognized <i>Switch</i> as the preferred framework for change management at Ed First among partners • Presented the power of the JTBD process at the September all-staff retreat through a case study and presenting organizational portfolio and finance data • Engaged key staff members, including partners, to inform the JTBD definitions and implications of the work • Provided regular updates on the strategic project to all-staff using vehicles like the bulletin and the monthly all-staff calls (tactical updates occurring mostly in 2016) • <i>Did not engage staff beyond the partner team in the earlier phases who could have been allies to champion the JTBD findings</i>

Theory of Action “Then” statement

Build the knowledge and commitment of Ed First leaders to make strategic shifts in its business model so as to maximize profits and the desired impact on clients, staff, and the education sector writ large.

“Then”	Progress to date
Build the knowledge and commitment of Ed First leaders...	

With regards to the “then” portion of my theory of action, there is evidence to suggest I was able to successfully build the knowledge and commitment of Ed First leaders. Partners were actively engaged on their weekly calls and at their in-person retreats throughout this process. This engagement was exemplified through their thoughtful questions, their completion of most pre-work assignments and the offer to spend additional time in and outside of meetings doing additional work to clarify the JTBD both in terms of meaning and the precision of language. In particular, the founding partner was actively engaged in refining the language and examples used to describe the JTBD, consistently noting the importance of language precision and partner alignment around the definitions so the analysis could be used to make important organizational decisions for 2017 and so the JTBD can be infused throughout the staff with consistent understanding and application.

While it took some time, commitment and knowledge was evidenced through the partners’ referencing and leveraging the analysis in strategy-related discussions with one another and with other senior leaders. For example, in discussions related to the profile needed for incoming consultant hires, the managing partner referenced the need to better understand where there may be gaps and an abundance of particular skill sets and expertise needed to deliver on the prioritized JTBD. Additionally, in conversations with senior leaders about which markets to target for the coming year’s business development efforts, multiple partners referenced the

connectivity between how the markets being discussed had certain proclivities for certain JTBD that were uncovered through the Strategic Insights Project.

Lastly, commitment was evidenced through partners encouraging the promotion and dissemination of the Strategic Insights project findings to all staff and the reception that this analysis had with them. The managing partner asked me to co-present the early Strategic Insights findings as the kick off to the all-staff retreat in September 2016, which was an important signal of executive sponsorship of my work to the firm. At the retreat, a number of staff members publicly raised questions about the strategic direction of Ed First's portfolio, questions inspired by having access for the first time to hard data to illuminate the characteristics of the current portfolio. Furthermore, staff reported the information presented in the session felt like a turning point, after the early 2016 reduction in force and strained financial positioning.

Additionally, 88% and 100% of staff surveyed (n=42, 94% of staff), following the September all-staff retreat, responded agree or strongly agree to the following survey questions, respectively:

- *I understand the firm's historical and current health as defined by financial, cultural and other indicators.*
- *I understand the JTBD framework and business model approach to identifying Ed First's position in the market and implications for the firm.*

Via email and in meetings following the staff retreat, individual staff members inquired about wanting to learn more about the Strategic Insights Project and more internal team members sought advice on how their work would fit into the broader strategic planning in the organization.

However, there is also evidence to suggest this outcome was not fully realized. I was unable to share the findings from the JTBD analysis with anyone outside the partner team and the Director of Human Capital and the Deputy CFO until December. This was, in large part, because partners had not yet internalized or aligned on the implications of the findings until then. The partners were committed to offering a united front to the firm and historically kept regular

financial reporting and decision-making internal to the partner team exclusively. Therefore, I could only shallowly engage with staff outside of the group to make meaning of and leverage the Strategic Insights findings. Once decisions were made regarding the budget and staffing using the prioritized JTBD and other Strategic Insights analysis, there was the opportunity to engage senior staff directly in the findings and implications of the findings for their work, most notably, defining the aspired portfolio to align the business development portfolio to.

"Then"	Progress to date
...strategic shifts in the business model to maximize profits and the desired impacts on clients, staff and the education sector writ large.	

The Strategic Insights analysis was a primary consideration (among others) in the development of the 2017 budget and re-designing key processes of the firm. Partners established 2017 priorities based on the data and facilitation of the Strategic Insights Project. The JTBD findings was foundational, but it was the more comprehensive analysis around how the JTBD intersected with revenue projections, different potential market opportunities, quality and what client-facing staff shared as their needs that served as the primary fodder for decision-making. In that process, partners adopted recommendations such as adjustments to regular firm reporting for 2017 to include data to analyze the shifts in the firm’s portfolio by JTBD and other data points surfaced through the Strategic Insights Project, signaling an important change in process for the firm.

In addition, partners adopted the recommendation to invest in re-designing the firm’s business development efforts. The managing partner charged me to lead these efforts with the explicit expectation that the Strategic Insights Project analysis would inform the

firm's approach to business development and create an opportunity for senior staff to internalize the JTBD further. Leading up to the February meeting with senior leaders to collaborate on the business development re-design efforts, a survey of 11 of the firm's top 12 sellers showed they agreed or strongly agreed to the following statements:

- The JTBD definitions resonate with my experience at the firm.
- I believe the JTBD and other portfolio analysis can help me better understand and assess the needs of my current and/or potential clients.

The firm's top sellers were able to come to agreement and recommendations on what markets to target for 2017-18, informed by the Strategic Insights analysis, and reach clarity on the potential financial yield of those business development efforts. Partners subsequently ratified and allocated \$125,000 towards the recommendations I proposed.

However, the recommendations for target markets for 2017-18 were mostly based on revenue potential and the firm's ability to leverage its current resources and processes to secure the market. Business development leaders are currently working to create more specific plans to articulate what the specific work is they are proposing, who the target clients are in those markets, their JTBD and how their proposed approach will serve the firm's commitment to low-income students and students of color.

Overall, the potential for how shifts in the business model might impact the financial sustainability of the firm is substantially more defined than what shifts in resources and the processes of the firm might yield in terms of its mission. This is largely because the aspired impact remains more of an approximation among partners and staff, rather than a well-defined articulation of what impact Ed First wants to have in the sector.

Financially, the firm is not only in a stable place, but a thriving one. Midway through 2016, the firm had \$5.7 million in sales compared to more than \$7.2 million just one quarter in to 2017.

To keep up with the demand, Ed First set an ambitious goal to hire seven or more new staff members in the first quarter of 2017, a nearly 15% increase in the firm's size, before the end of the first quarter. As the firm's managing partner shared in a communication with me, "this is not all due to JTBD and Strategic Insights, but that has played a role in how we are doing the work, what the 2017 budget commitments look like and level of commitment you (as a leader and the analysis you provided) were ultimately able to inspire in partners and others to make key moves" (personal communication, March 2017).

Analysis

During the residency, I employed multiple strategies to build the knowledge and commitment of firm partners and staff to understand and make strategic decisions using Christensen's JTBD and business model theory and analysis. At different points in the project, the results of those efforts were variable. What enabled or disabled my success and the success of the project? To understand the results of my strategic project, I explore the nature of the work, assessing the technical and adaptive challenges and organizational dynamics, through Heifetz's adaptive leadership framework. I also employ Mark Moore's Strategic Triangle to better understand where value, operational capacity and legitimacy and support were being enabled or disabled within the organization during the implementation of my Strategic Project.

Technical versus adaptive challenges

According to Ron Heifetz and Marty Linsky, leaders in any part of the education sector face two distinct types of challenges: (1) technical challenges, solvable with already known solutions or applied management and (2) adaptive challenges, not so easily solved because instead they require experimentation, discovery, and an evolution from people inside and outside of the organization (1994). Heifetz and Linksy also assert the fear of loss and the unknown is strong when organizations and communities are facing adaptive challenges and that often in these circumstances leaders face strong, and potentially dangerous, reactions from those that the change will impact. Heifetz's and Linsky's framework for understanding different types of challenges, the likely reactions to them from stakeholders, and the approaches one might take provide an important lens to understanding the outcomes resulting from the leadership moves I made throughout the

strategic project with the partner team and with the larger staff team. Counteracting these forces and proactively planning to stay ahead of them as much as possible requires leadership strategies like getting on the balcony, giving the work back to the people with the problem and finding strategic partners, all of which I employed during my residency.

Getting on the balcony and identifying the adaptive challenge

Heifetz and Linksy describe “the dance floor” for a leader, where he/she is in action-mode and only able to see just what is in the immediate surrounding (53). “Getting on the balcony” is the process by which a leader needs to step back from the interactions and engagements in order to assess the context. This process requires an assessment of and hypothesis around:

- The technical versus adaptive challenges
- What roles different stakeholders play for the group and
- How authority is used and for what purpose.

Below is a table that illustrates the primary technical versus adaptive challenges related to my strategic project with Education First.

Technical challenges	Adaptive challenges
Data collection, analysis and presentation • financial analysis around revenue and sales • conducting client interviews and organizing data from client interviews • organizing the data into digestible presentations and reports	Partners and staff adopting a new way of understanding, talking about and doing their work, some of which may represent a significant departure from how they thought about or engaged in their work previously Partners remaining committed to and engaged throughout a process that would challenge many of the ways the firm had been previously organized and/or how the firm or its leaders articulated the value of its work internally and externally

I had identified these technical versus adaptive challenges early in the project, which was essential for creating time and space for productive struggle in the process. However, I underestimated the adaptive challenges in a number of ways, which resulted in elongating the timeline and shifting parts of my approach, most notably in Phase 3 and 4. In the section providing analysis through the Strategic Triangle, I will further explore how and why my efforts were not creating the hoped-for value at different points in the process.

As described earlier, adaptive challenges are those that represent a departure from the loyalties and current modes of operating of a particular group. During the first October partner retreat, I planned for the team to digest and adopt the JTBD in a two-day time period. I had not paused in designing the sessions with them to fully appreciate how parts of their own identities or schemas would be called into the question. I thus underestimated the adaptive challenge. Looking back, I can now see that the iterations of the JTBD language that partners workshoped over a 3-4 week period did not substantially change. Interestingly enough, tracking back to the first post-retreat conversation where I thought we had nearly “landed” the definitions, one of the four partners was insistent that not all the clients had been coded accurately to a job and the definitions themselves were not quite accurate yet. Two of the others were less vocal, which I mistook as buy-in. In later one-on-one conversations, I came to understand they did not think the JTBD analysis would be a prevalent feature of their decision-making, so to them, weighing in at this juncture did not matter very much. This experience triggered me to pull myself onto the balcony, as Heifetz suggests, and assess more deeply. I mistook intense questioning from one of the partners (that elongated the timeline for the

work) as interference in the process. This was, in part, because the ways in which I was unconsciously measuring my success was defined by the partners' acceptance of my work products, and an adherence to a timeline rather than by an articulation of an organizational value proposition that they felt ownership of. When I had this realization, I was able to course-correct by strategically surfacing lack of agreement among partners regarding what the JTBD analysis would be used for. I did this intentionally so they might greater align across the team, while also building in time to acknowledge what the shifts in the business model might need to look like moving forward to become more jobs-aligned.

In early December, literally minutes before kicking off the partner retreat, the founding partner expressed to me that she did not believe the JTBD insights would be helpful in their imminent work to develop priorities and a budget for 2017. This was the same partner whose vocal engagement I mistook for opposition. After spending more time to understand her perspective, I came to understand that she thought the JTBD process was going to more wholly disrupt the way the partners thought about their business. She felt like the analysis further clarified and named aloud what she had instinctually thought and felt about their work, but that it did not feel like the sea change she had anticipated.

This interaction helped me to realize I had not properly diagnosed the JTBD of the Strategic Insights Project for each of the partners. I had diagnosed the context, but I had not really unpacked the functional, social and emotional needs of each partner. In this case, the partner had anticipated analysis that would help the firm pursue, in part,

radically different markets than they were previously pursuing. Yet, the process I had designed was about clarifying the value proposition as defined by existing clients.

I was able to recalibrate expectations with her and I, along with the managing partner, helped to paint a picture of how this analysis could have a significant impact on the organization's financial goals and impact goals. But still, I could see I had focused the partners so much on the JTBD framework that it enabled the focus to shift away from the central reason why we were engaging in this process overall: to strengthen the business model and improve Ed First's financial positioning and ability to take on mission-aligned work. In other words, I had remained (and I enabled the partners to remain during our sessions together) on the dance floor without pulling up to the balcony to see how the work we were doing was connected to the broader system.

Taking a balcony perspective proved to be a challenge in large part because I was so intensely engaged on the dance floor, and more importantly because in many ways I was planning and executing on the work alone. I was working 20 hours more per week than had been negotiated because I had proactively offered to take on more client work as a way to build my own knowledge base of the organization and build trust with firm partners and staff. Moreover, the managing partner was new to her role, also working 20 hours or more per week than a normal schedule as she had other organizational issues to attend to, leaving little time for us to check in on the big picture. Lastly, it is more apparent to me now how the work feels so much more intense when you are shouldering the work (in this case, the analysis and facilitation) nearly alone (versus with a broader team of organizational leaders), which is what occurred at times in my strategic project, keeping my attention on the dance floor.

A few weeks later, just after the partners approved the budget, I realized I was still on the dance floor as a leader. I put forward a plan for engaging staff broadly in the JTBD work to the managing partner. We had been working at a fast pace, with no pause, to draft and secure partner approval on the 2017 priorities and firm budget. Thus, when the managing partner asked to put a pause on my sharing the analysis with others in the firm more broadly, I was caught off guard. It was a moment, however, where I realized I needed to get on the balcony yet again to better understand what was happening. Upon additional reflection, I came to realize that part of what was driving my desire to share the JTBD with the entire firm was that I had let the analysis, at times, become the end, not the means. Ostensibly, working alone on the design and analytics for partners, I remained on the dance floor for too long, blurring sight of the actual goal which, again, was to help the organization's leaders understand how to allocate and align resources and design processes to best deliver on that value. However, I was defining value, in some moments, in direct proportion to the agreement of the partners with what I had put forward rather than defining my value in the ability to deftly handle resistance and divergence for the greater good of the organization.

It was also driven by my desire to share the tool and insights with more people than just myself. I saw such potential for this tool for the firm and for education broadly, and had evidence that suggested the framework resonated. However, I was also operating, in many ways, outside of my own frontier of competence as I was in a new organizational context, with leaders I did not know well, using a framework I had only applied in a handful of other settings and with much lower stakes. In part, my pushing

forward to share the information with the firm was likely driven subconsciously by my own need to be validated by firm staff.

Despite the challenges, the final outcomes suggest I successfully facilitated the adaptive challenges in a number of ways, as evidenced by the fact that the JTBD and Strategic Insights findings served as a primary input for the decisions made by partners regarding Ed First's 2017 priorities and budget. In a previous role in another organization, a manager of mine instituted a policy that whenever someone from the executive team was launching a new project and subsequently updating him on progress, he/she needed to answer three questions: 1.) What am I trying to accomplish? 2.) Why is that important? 3.) How am I going to get there and with who? Through Heifetz's concept of getting on the balcony to reflect and using these three questions I was able to step away from moments when the reception or engagement of the partner team seemed off track to recalibrate myself and them to the bigger picture of what we were trying to accomplish.

For example, following the managing partner's feedback to pull back on the broader engagement of staff around the JTBD analysis, I realized I needed to reframe how the work was being positioned with the partner team and the staff team broadly. The work of Strategic Insights and the JTBD analysis in many ways was completed. That knowledge had helped to inform the 2017 budget and priorities. We were now in the phase of translating those priorities and resources into action and so beginning to talk in terms of strategic planning; re-centering on the business model framework overall was in order. In presentations that followed to partners, senior leaders and the firm's staff as a whole, I began to position the Strategic Insights project as one of many inputs that were

being considered to make shifts in the business model designed to increase the impact and improve the financial positioning of the firm.

The Strategic Triangle

In *On Creating Public Value*, Mark Moore outlines the Strategic Triangle (see Figure 5), a framework for understanding strategic management in the public and nonprofit sectors (1995). In a more recent working paper, Moore and his colleague Sanjeev Khagram translate these concepts to the for-profit sector asserting that organizational leaders of all types must be able to “...imagine and articulate a vision of public value that can command legitimacy and support, and is operationally doable in the domain for which you have responsibility” (2004, p. 9). The authors emphasize that legitimacy and support can take many forms, including: financial support, social legitimacy and political advocacy. These are all necessary to provide a strong foundation for a leader and his/her organization to operate in a particular environment, which they refer to as the “authorizing environment”. Finally, the authors hold that for public value to be created, an organization must have the operational capacity, including new investments and innovations to adequately deliver on the desired results of today and in the future.

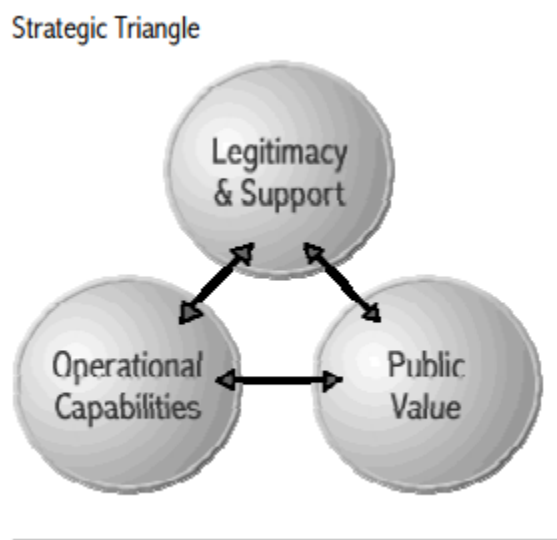
Figure 5

Figure 5. The Strategic Triangle. Reprinted from *Creating Public Value: Strategic management in government*, by M. Moore, 1995, retrieved from <http://www.hup.harvard.edu/>. Copyright 1995 by Harvard University Press.

The success of the strategic project was enabled because the value proposition of the work itself was strong for the firm and its partners. The firm was coming off of a financially unstable year, there had been some significant shifts in staffing (both earlier in the year as a result of the reduction in force and later in the year due to natural attrition) and leadership, and the country itself was experiencing shifts in political leadership that would inevitably result in shifts in the education sector. The potential to engage in a facilitated, strategic planning process, undergirded by rich data analytics, provided an important path forward in a time of great uncertainty.

The success of the project was also supported by the legitimacy and support I garnered as the project's leader. Specifically, I built trust with partners by ensuring they knew the extent of my first-hand understanding and experience with the cornerstone

frameworks I was using and the external supports I would and did use in employing these frameworks, like advice and counsel from former On-Star CEO and Harvard Business School professor, Chet Huber, and Bob Moesta, a primary architect of the JTBD Methodology. Trust was also built through my engagement with partners through client work. Because I was able to hang my analysis on real-world, daily experiences with Ed First clients and, by and large, was receiving positive feedback from clients and the Ed First staff I was working with, I (and the analysis I provided) was seen as trustworthy.

I was also legitimized by the executive sponsorship of the managing partner, who positioned me to present and facilitate in partner-exclusive settings and in high-profile all-staff settings, like their bi-annual retreat.

Additionally, as the work unfolded, I built credibility by consistently delivering high-quality analysis and information, holding my access to sensitive organizational data and partner discussions confidential, as my level of access in the firm to this information was highly unusual.

However, there were moments where trust in the analysis or the process waned, with the value being called into question. As I described earlier, prior to the December meeting wherein partners were set to make decisions on the priorities and budget for 2017, the founding partner directly questioned the utility of the JTBD analysis for strategic decision-making at the firm. If her concerns remained unaddressed, it is likely the legitimacy and support required to sustain the work would have dissipated. As stated previously, what I had missed in that interaction was keeping too much attention on the operational capacity, the actual analysis and information. Through my facilitation, we had spent significant time as a group clarifying the value proposition of the organization.

Yet, when it came time to allocate resources and prioritize process improvements for the organization as represented in the 2017 budget that information on value proposition was not translating. I had failed to make explicit the notion that the JTBD analysis was one data set of many (including partners' own instincts and perspectives) that should be used to set the future direction and resource allocations for the firm.

This project's success was also rooted in the operational capacity that existed in the organization long before my arrival. Ed First's culture and hiring practices attract and retain high-willed, high-skilled professionals. Moreover, its culture is defined by its own staff as entrepreneurial and innovative. The combination of these two things enabled the project to move fast early on because the firm had the technical capacity (in my efforts and a handful of other staff) required to engage in the work as well as a willingness to consider alternate directions for the organization. During my first month on the job, members of the internal and external team were generous with their time, offering to meet one-on-one to answer my questions and providing me with guidance to find or direct access to data necessary to answer many of the questions I was posing. During this early diagnosis, I found a number of staff who were eager for a change in the firm's business model and thus were eager and supportive of the work I was doing.

I also encountered a veteran, internal staff member who expressed extreme skepticism, and in some cases, tried to redirect the work away from the analysis I was producing. For example, in early conversations, the staff member made comments suggesting some of the analysis I was trying to conduct had been done before, but without traction or uptake by the partner team and that perhaps my efforts might not be worth the time investment he believed it would take. This was a signal that he believed

the operational capacity of the organization (or my own personally) was not equipped to deliver the value I promised (it was also likely a signal of limited perceived public value). Subsequently, as I continued with the analysis and shared emerging drafts of new cuts of data and hypothesis, he continued to share written and verbal skepticism of the ability for the firm to use this type of data, again signaling a lack of trust in the operational capacity of the firm to leverage this type of information. Despite the skepticism, this project has generated a greater emphasis on and a greater appetite from partners and staff to use cross-functional data to guide organizational decision-making. Moreover, as a result of this increased emphasis there is greater urgency to make greater investments to ensure the integrity of the firm's operational data and use data in a more cross-functional and predictive way.

Giving the Work Back

According to Heifetz and Linsky, when facing adaptive challenges, stakeholders can react to leaders in a number of conscious and unconscious ways that might thwart progress when they feel threatened, afraid, or like they may lose something (2002). They also note that addressing adaptive challenges requires the people with the problem to “work the problem” which means that leaders do not provide answers from a position of formal authority but help to situate and frame challenges all the while facilitating the people whose challenge it is to come up with the solutions.

Ed First has a strong culture and internal processes to make sure that the “so what” of analysis is always clear and strong for clients. There was a transfer of this expectation to the Strategic Insights Project. Throughout the process, there were times when I experienced pushback or felt pressure from the managing partner or the partner

team to create recommendations *for* the partners versus *with* the partners. For example, much of the power of the JTBD Methodology comes from the actual listening to clients and experiencing the world through their eyes. Simply reviewing another person's analysis of that listening does not create the dissonance and the internalization required to make such adaptive shifts. Different partners asked several times if listening to client interviews I had conducted was really necessary and the managing partner received an email from one partner sharing that his time was limited and that the request of time I had made for client interview listening (two hours) felt excessive. There were multiple examples like this from the partner team, where one or more of the partners asked to truncate the process and/or for recommendations to be generated for partner reaction versus engaging in co-creation.

Moore's framework suggests either the firm lacked the operational capacity to engage fully and deliver on the value or operational capacity was there and what drove the lack of engagement was not showing clearly how the operational capacity investment would translate to value. My analysis suggests across these instances it was both. For most weeks during this process, partners' time was stretched beyond a typical workload and thus, their operational capacity to engage was shrunk. The pressures of trying to ratify a budget by the end of the calendar year when the analysis had not been fully digested also strained operational capacity.

However, it is also true that, because I lacked experience in this industry and with the analytic process of JBTD, I struggled to make explicit connections between how the work we were doing to clarify the firm's value proposition would translate concretely into actions and shift parts of the business model. The successes I had in making such

connections occurred when I took the time to help internal staff, beyond the partner team, internalize the JTBD and Strategic Insights analysis. The firm's director of human capital was a close partner throughout the process and, as a result, she leveraged the findings in her approach to staffing, hiring and organizational planning, providing at least some concrete ways that the analysis was translating into valuable practice.

According to the founding partner, the JTBD analysis is also being applied in ways that are not always visible firm-wide, but are consistent nonetheless. For example, recently a partner and senior staff member were deciding whether to pursue a particular project and engaged in conversation asking explicitly if this was a "hired gun" or "co-creator" job. Ultimately, they decided to pursue what they deemed was a "hired gun" project, and as a result were able to staff it accordingly. As the partner in this example stated, "because we knew it was a hired gun, we staffed the right team with the right expectations" (personal communication, March 2017).

The "then" part of my theory of action- *equipping Ed First leaders with the knowledge and shared commitment to make strategic shifts in its business model*- required partner engagement not just in the form of discussion, but in deeper internalization exercises like data coding and listening to client interviews, and by facilitating the partner team to work together in a new and different way. I was able to build the firm's operational capacity as well as more legitimacy and support as partners and I engaged further one-on-one and in group discussion with partners. I continued to push and develop partners and the data until we were able to collectively align on the language and substance of the value proposition, what JTBD would be prioritized and

some key shifts in the business model that would need to occur to strengthen their ability to deliver on the JTBD.

Using Heifetz's framework throughout the Strategic Insights Project, I tried to hold fast, almost blindly in some cases, to the partners and firm staff being a part of the co-creation, following the guidance of giving the work back to the people. However, there were also times, when following that guidance blindly did not serve my purposes well. For example, I had gathered and organized data where revenue and sales data had come from in the last 18 months of the firm. Running short on time, I organized the data into hard-to-digest data tables versus generating easier-to-digest data displays. In reflecting on the experience right after with my manager, she provided helpful feedback which is that partners spent double the time they needed to read and analyze the information than was required. In that interaction, I needed to be more discerning about locating the real work and what was essential for co-creation.

In reflection, I was doing this as a way to overcompensate for my natural tendency to produce work quickly and in isolation. My high-energy, high-urgency approach to work has been a hallmark of my leadership and, I recognized, at least in theory, that if this project was going to be sustained beyond me and actually produce organizational change it needed to be created and owned by the leaders of the firm and staff.

As noted previously, there were also more subtle cues early on from staff that they saw my work as Harvard-driven rather than organizationally-driven. To create a sense of shared ownership, I worked with a few staff members to title the project in a way that connoted utility for the firm overall. Even in these conversations, I shared rationale

for wanting to brand the project with a formal title, further emphasizing that the project's success would not be defined by a committee-approved capstone, but by Ed First leaders feeling like they have new, important information to make strategic decisions that strengthen its impact and financial stability.

The Importance of Partners

Heifetz and Linksy share that leaders of adaptive work need to find partners, including authority figures, but also members of the factions for whom change will be very difficult. Moore's Strategic Triangle suggests that partners, particularly those with formal or informal power, play an important role in providing legitimacy and support. I had the benefit of being formally assigned and informally engaging strategic partners in the Strategic Insights Project. Early on, the Director of Human Capital was a strategic ally. With five years in the firm and incredible respect by the partner team, her engagement and buy-in was critical. More than politically, her substantive input strengthened the analysis throughout the project.

Additionally, my manager, the managing partner, was both a member of the partner team and the chief executive of the firm. She was arguably my most important partner. Her continued sponsorship, inclusion in partner conversations and rich feedback on my work and leadership signaled her value of me and my work to other partners and the firm writ large. Lastly, the founding partner, who ostensibly is the culture leader of the partner team and the firm, was a critical ally. Early, I set up a bi-weekly check-in with the founding partner (even though she was not my direct supervisor and I already had weekly check-ins with my manager), asking for her input and feedback early and often. More importantly, I listened carefully to the language partners used, particularly

the managing partner and the founding partner, so when recommendations and analysis were put forward to the partner team, their language and priorities were reflected in the drafts. Without their engagement and substantive feedback, the project would never have been successful.

I question whether more people in the firm could have helped to shape the actual articulation of the JTBD of the firm, which served as the springboard for the rest of the business model recommendations. From the earliest engagement with partners, there was intense scrutiny on what was shared with staff beyond the partner team. This scrutiny was both a result of a cultural norm to hold much of the firm-wide financial data and decision-making close to the vest within the partner team as well as a desire to protect staff from the perception of additional firm-wide change because Ed First had just taken a cultural hit, in some ways, laying off three staff members and changing from a CEO to managing partner structure. Towards the end of November, partners were eager to have senior staff pressure-test the co-created JTBD definitions and begin to weigh in on the implications for the firm. I interpret this as a positive sign, particularly given the hesitation early on, which was, in large part, driven not only by desire to analyze the information within just the partner team first, but also because many staff were over-capacity as the firm's financial positioning had begun to take a significant turn for the better. I believe to enact change firm-wide, a greater number of staff needed to have facilitated space over time, like the partners, to make sense of and use the analysis.

As shared earlier, at the December retreat, partners agreed to my recommendation that we convene top sellers in the firm to rethink the target markets for 2017 and to begin to design the infrastructure necessary to support staff in their collective and individual

business development efforts. In many ways, the strategy of the firm is set by the people who sell the majority of the work, which at Ed First is about 10 people. This was the coalition that was needed. If the JTBD and other firm analysis was actually going to be used to strengthen the business model, I realized it needed to be in the hands of the people working to bring in new business and lead client project teams. Rather than trying to infiltrate the entire 50-person firm at once, it became more apparent that the guiding coalition for shifting the business model would be this group of top sellers and project leaders. As a result, I focused my efforts on helping build the knowledge and commitment of these 10 people and create the access such that their perspectives would be considered in the strategic shifts to the business model, and most particularly in setting business development targets and overall strategy.

Recognizing Public Value

In his later work, *Recognizing Public Value*, Moore builds on the concept of the Strategic Triangle, offering that recognition, measurement and communication of public value are key precursors to creating that value (2013). He describes the challenge of this in both technical terms—the challenge of finding measurements that accurately measure the impact of social good organizations—and in adaptive terms—the challenge of getting stakeholders in and outside of the organization to recognize and use such measurement to guide and give meaning to a public organization’s work.

Part of my working hypothesis was that if I facilitated the firm’s partners to understand and prioritize the JTBD against their blended value proposition, then I would equip Ed First leaders with the knowledge they would need to make strategic decisions to increase impact and financial sustainability. There is significant evidence that partners

were very interested to know more about revenue sources, business development and how the firm should think about its JTBD. I was a trusted partner to facilitate this work.

When it came to conversations about mission or impact, there seemed to be less agreement among the partner and less interest in their resolution. For example, there was a lot of enthusiasm to ensure the right coding structure was developed so that the analytics of where revenue was generated from was clearly communicated. However, when questions were posed about the inherent theory of action in each of the JTBD and their belief in how the different JTBD would affect the change in the education sector, partners were less interested in alignment and resolution. My conclusion is this indifference was a byproduct of a number of things including, but not limited to, the challenging nature of measuring and general ambiguity of defining impact in education and the firm's rightful focus on re-establishing itself financially.

Early in my residency I interviewed each partner individually to ask about their short- and long-term goals related to revenue and impact. There was greater variability among partners when it came to their articulations of how to measure impact and what their goals were. The responses ranged from one partner articulating a strong desire to have clear impact measures that the firm could discuss internally and externally to another partner who was more indifferent on the matter, citing how difficult measuring impact accurately can be but that he would be willing to invest people and time in the endeavor if the partner team believed it would be a motivator for staff.

I learned that applying the JTBD framework at a mission-driven for-profit was operationally straightforward, given the need to generate more revenue. Ed First was focused on what it could measure and needed – revenue – rather than what it could not

directly measure, which is impact on the education sector. At Ed First, revenue concerns were especially salient given the challenging financial year of 2016. As a result, I was well-positioned to spur conversations about the firm's value proposition in financial and operational terms. However, given the reduction in force and the focus on sales, conversations related to the value proposition defined by impact did not have the same urgency or resonance.

I believe deeply that the organization is committed to impact. I think part of the issue is that staff, including partners, have very different definitions of what that might mean. Even with values that exist in their mission surrounding equity, I found that there is not an intentional, common recognized strategy for what that means in practice nor what outcomes the firm would measure to know if they are operationalizing their mission and vision. For example, in a discussion with about 10 staff members I asked participants to reflect on how the JTBD analysis might serve the firm's commitment to equity and was met with mostly silence. Across the few staff members that did speak up, there were inconsistent views on what serving at equity agenda might mean for the types of clients Ed First pursue and what services Ed First could offer. This outcome is likely both a result of not having a shared language and understanding of what pursuing an equity agenda at Ed First means, as well as variability in the comfort level and skill level of staff to engage in what were deemed "sensitive" conversations related to race, class and privilege.

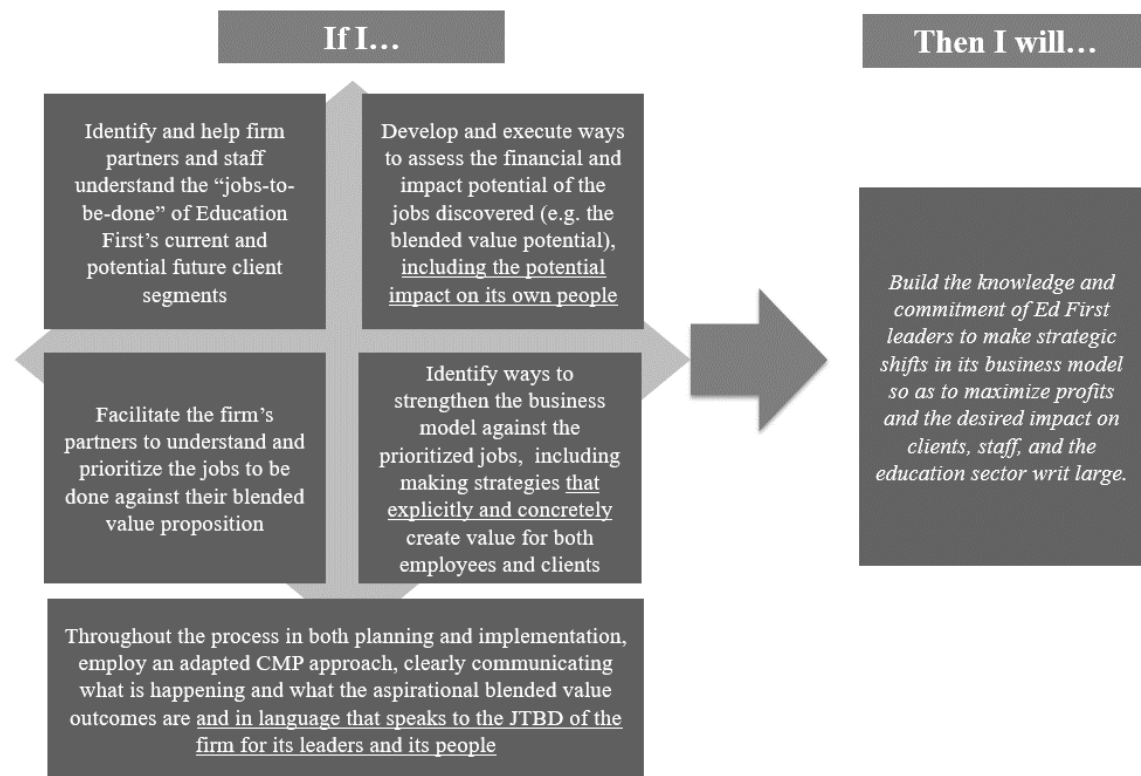
Broadly, I found the blended-value and the JTBD analysis has the potential to privilege, to some degree, the revenue-maximizing side of the framework under certain circumstances, particularly when the financial positioning of the organization is not strong. This is not to say that Ed First does not have a desire to clarify the impact agenda

nor that the organization has not tried to do so in the past. In fact, re-securing the firm's financial positioning was consistently framed by the managing partner as an enabling condition for the firm to be sustainable and achieve its mission. However, it still remains that the organization lacks a shared definition and shared language of their public value, including its work on "equity."

Theory of Action (revisited)

Reflecting on my original theory of action using the analysis above, the theory has proven to be largely accurate, but with some enhancements (see underlined text in the visual below) that I think would address some of the challenges I faced.

Strategic Project Theory of Action (revisited)



There was too much emphasis on the JTBD theory without consideration initially of other pathways to the “then.” The framework did help to provide the partners and me a common language with which to orient our discussions. However, in the end, the additional portfolio analysis and the instincts of the partners on where the firm should go next were also important factors in building the knowledge and commitment that leaders needed to feel confident in making shifts in the business model.

Missing was the need for my efforts to be situated in a recognition of what the JTBD of this project was for partners. It was not until early December that I realized one partner was under the assumption that this project was potentially going to yield information that could take the firm in a significantly different direction than its past in terms of markets and service offerings. As shared earlier, I was surprised by her reaction and realized in that moment I had not sufficiently taken stock of what the JTBD of my strategic project was for each of the partners. Nor had I recognized the mirroring that was happening between my approach to the project and the JTBD we had uncovered for the firm. She wanted a “fresh perspective.” I was taking the approach of “co-creator” but had not necessarily made that explicit. While I would not have had the language like “facilitator/politics navigator” or “co-creator” early on, I could have more deeply assessed with each partner what success looked like at the end of this project and facilitated a shared conversation around expectations. That conversation early on could have opened up more space for frameworks and tools beyond the JTBD theory.

Furthermore, simply using a change management approach and trying to communicate early and often was insufficient. The most successful outcomes in the strategic project were a result of efforts where I was simultaneously able to address the functional, social and emotional needs of the partners and staff. In other words, that occurred when I had a strong sense of clients’ JTBD and JTBD of the organization for staff and partners. I was able to frame and design analysis and recommendations in language that reflected their personal needs and JTBD. For example, the engagement level of staff changed drastically for the better when I moved from sharing the descriptive findings of the JTBD analysis to an approach where I chose one job and engaged staff

around key questions like: What other clients have this job? What types of services or supports could you see Ed First offering to meet their needs? What parts of that excite you/what part of that would you want to take a leadership role on?

The JTBD model is similar in many ways to the adaptive challenges Heifetz and Linksy describe. Successfully tackling adaptive challenges requires an acknowledgement of the loyalties of the people involved and the individual losses that addressing the adaptive challenges may mean for others. More than acknowledgement, adaptive leadership through an organizational change requires the calculated facilitation of stakeholders through a process where the end result is not exactly known, but the belief in the holding containers and the bonds among the groups involved is strong enough to withhold the uncertainty. There were multiple points in the process, as I have described above, where the outcome of the work was unknown and yet, there was a fairly high and consistent level of engagement from partners and senior staff. While there is room for improvement, the information and the approach to facilitation resonated. Thus, partners and senior staff were able to leverage it to take action, while also staying connected to how their actions were designed to have impact on the organization's dual bottom line.

In reflection, Heifetz's framework and its component parts (technical versus adaptive challenges, the role of partners, giving the work back and getting on the balcony from time to time) as well as Mark Moore's Strategic Triangle allowed me to see how my leadership enabled an organization to better understand and feel ownership of its value proposition and start taking steps towards aligning its business model to deliver blended value in the education marketplace. Overall, as referenced earlier, there is sufficient evidence to suggest that the organization has already taken important steps to

strengthen its business model, resulting in a healthy financial position and the enabling conditions to more concretely define its impact.

Implications for Self, Site and Sector

Implications for Self

I joined the Ed First team as a Harvard resident excited to make a contribution to a well-regarded organization known for its down-to-earth, fun culture and connections across the education sector. I entered curious but hopeful about the role of a consulting firm to impact change at the local level. My professional identity has been squarely built as a public servant. I looked forward to having a very different experience than my professional roles previously had afforded, most of which had been serving in school-based and central office roles within Baltimore City Public Schools.

I came in knowing I had a lot to learn about the for-profit world and role of support partners, but also feeling confident that the courses I had taken in the Ed.L.D. program, as well as the organizational strategy work I had led at various point in my career, gave me the tools and experience needed to at least start heading in the right direction. Between that experience and knowing I had strategically enlisted a Capstone Committee and off-site mentors who had experience in the for-profit and education sector, I was poised to start the work of helping Ed First better understand and deliver on its value proposition to the sector.

After just a few months on the job, and particularly through working with clients directly, I easily saw how Ed First and consulting firms like it have the potential to add value to the sector and to organizations who are the direct service providers to students, like schools and school districts. **I was able to renegotiate my own professional identity, broadening the ways in which I thought of myself as a professional and thus broadening the roles I can now see myself fulfilling.**

In order to build legitimacy and support within an organization, it is essential to diagnose what cultural currency the organization trades on. I learned quickly Ed First places a premium on concise, near-perfect writing and presentation development, a commitment to fun and harmonious interpersonal relationships, and having a personal relationship and executive sponsorship from a member of the partner team. I found myself early on questioning the value placed on certain things like interpersonal harmony when I personally believe you need to experience professional challenge to grow. Yet, I found myself diagnosing the culture and trying really hard to mirror the norms and the values of the organizations. There were moments in my residency when I thought of myself as a sell-out and wondered what my former “district-self” would think of my newly formed obsession with text-box alignment on presentations and perfect word choice. I scoffed at what my “Ed.L.D.-self” would think about my shying away, at times, from directly challenging issues of equity or inequity in the firm’s practice. I used to think that the strategy of how my values manifested at work in my professional practice had to remain consistent for me to be true to myself. I now realize that adjusting how your core values show up is not the same as situationally adjusting your values to fit a culture. Rather, reading an organization’s culture and trying to adapt my approach, but still in alignment with my values, is a strategic choice. **Understanding how credibility is built in an organization provides me the language and cultural currency necessary to translate my values into work shared and understood by others in that organization.**

Probably the single biggest learning for me during residency is that strong leadership does not mean having the right answers, it means having the right questions. I

have been taught and rewarded for as long as I can remember for having all the right answers. This schema of success runs deep in my psychosis, starting back with being the only child publicly rewarded for having straight A's on my Kindergarten report card. I have looked to others to gauge my success and that success has been deeply rooted in a standard of perfection instilled by my mother, whose fear was that anything less for a woman in the professional world would be inadequate for a life of independent success. Over time, I have worked in a series of dynamic, high-stakes environments that demanded work to be launched and moved quickly. Through those roles, I have built a professional reputation on my dependability and ability to get things done quickly and with quality. I have been recognized, rewarded and promoted because I was able to diagnose problems and build or find solutions quickly.

I walked into Ed First with less experience in the consulting or the business world compared to almost everyone else in the organization. What I did have were important frameworks, research and guiding questions. I found that my assets married with the expertise and experience of firm partners and staff made for a powerful combination. This combination ultimately enabled Ed First to define its strategic direction. So, in the end, the strength in my **leadership was not a result of having the right answers, it was about having the right questions.**

Lastly, this project has illuminated a related leadership lesson about the importance of teams. I spent a great deal of time (alone) organizing, analyzing and developing presentations to share data from various sources. When it came time to facilitate discussions around the information, I found myself miscalculating the time and the scaffolding needed to help different audiences digest the data, develop their own

insights and make decisions using the data. Why? In part, the managing partner of the firm had a keen eye and 15 years more experience than I did in change management. As my own capacity and legitimacy and support continued to be built, I relied heavily on hers, the same way I was relying heavily on the advice and guidance of mentors with greater experience using the JTBD and business model frameworks in the for-profit world. They were more experienced in articulating the value of this process to partners and so I evoked their names and their language often early in the process.

Moreover, making shifts in the business model necessitated more than just executive-level buy-in. It required the legitimacy and support from senior staff who, in essence, dictate the strategy through the work they sell and bring into the firm and in the way in which they lead project teams across the firm. Making the work come alive is about more than just communicating the goals and strategies to them. It required, to some degree, co-creating the strategies with them and starting from a place of their own desires and interests. I needed more than their commitment: I needed their creative energy and their insights to evolve the work, not just carry it out. As I leave the Ed.L.D. program and into positions of executive management and not just project management, I will take the lesson from a familiar proverb with me: **“If you want to go fast, go alone. If you want to go far, go together.”**

Implications for Site

Education First has significant reach in the sector. Its clients range from the Bill and Melinda Gates Foundation to the Council of Chief State School Officers to large urban districts to small, local non-profits. They are truly a boundary-spanner and have relationships and access to perspectives in all parts of the education sector. Ed First's website states "Achieving our mission is our bottom line... We measure impact and we hold ourselves accountable for delivering excellent support and results in every engagement" ("Impact", n.d. para. 1). **To further live up to this promise, I offer two questions to the organization: 1.) With regards to impact, what, concretely and specifically, will success look like? 2.) How will you know when you are achieving it?**

Through the Strategic Project, the firm has clarified the JTBD, the markets and service offerings it wants to prioritize and gained a greater understanding of where its revenue has come from over time. However, as stated previously, the strategy of the organization is both deliberate (set at the top through strategic planning) and emergent (set by the senior staff in the firm as they network and sell work). Clarifying, and even going so far as to take Masaoka's suggestions on an internal co-creation process to develop impact measures, could be a way to align all staff to a coherent strategy and ensure clarity and alignment among partners around what type of impact Ed First wants to have in the field.

At one partner meeting, the founding partner riffed that the three places she saw Ed First having the most impact were: 1.) influencing those with the most power and influence in the sector to care about, fund, and create policies that support Ed First's mission 2.) helping solid, mission-aligned organizations get from good to great and 3.)

helping struggling or newly forming, extremely mission-aligned organizations get on solid ground operationally and financially (personal communication, December 2016). That articulation is a strong beginning and I urge partners to facilitate additional conversations with senior staff, clarify what impact looks like for each of these client types, and discuss ways that Ed First can monitor its impact organizationally. I also see this as an opportunity to bring its mission more to life, wrestling with it really means for Ed First “to deliver exceptional ideas, experience-based solutions and results so all students – and particularly low-income students and students of color – are prepared for success in college, career and life” (“Mission and Vision”, n.d. para. 1).

Relatedly, to understand impact, Ed First needs regular, more reliable ways to measure impact, client satisfaction and understand the JTBD of other parts of the education sector it intends to serve. Currently, there are no regular, consistently applied ways that client feedback is gathered at the firm. Certainly, understanding the client experience could be one input in measuring Ed First’s impact. However, I would caution that client satisfaction should not be the only measure used, as happy clients do not always mean good results or that impactful work is happening in the field. It is an important near-term measure to track and regular client data should inform Ed First’s internal processes and operations to become more efficient and more aligned with what clients say they want and need. Masaoka offers a process outlined in the RKA section of this capstone that could be useful to defining and measuring value (2013). Similarly, in *Recognizing Public Value*, Moore outlines in greater detail how leaders can approach the technical and adaptive challenges of creating a public value scorecard to measure, communicate and manage the organization towards a common definition of value (2013). Additionally, for the new markets

it seeks to explore, applying the JTBD process again in those markets will provide the organization with the valuable knowledge they need to effectively engage new clients.

To that end, one way to keep ongoing conversations regarding impact and financial sustainability at the fore is **to establish an external advisory board designed to provide Ed First with strategic guidance regarding opportunities in the field, how its brand is perceived and received and how to refine its strategic direction over time.** This group would not be a formal board of directors with decision-making rights, but rather an advisory board to provide expert, non-biased guidance to the organization. I believe my role as an “inside outsider,” with looser ties to the organization than those that either receive support from or work for the organization, has allowed me to offer a fresh perspective and also be a neutral facilitator and critical friend. Ed First has relied informally on advisors and partners in the past (notably to inform the 2015-2017 strategic plan). Members for this advisory board could be chosen for their expertise, particularly in market areas and issues with their Race, Inclusion, Diversity and Equity agenda that Ed First wants to prioritize, as well as familiarity with Ed First and its staff.

An advisory board could help the leaders of the organization reflect and make pivots in the other parts of the business model that this project did not attend to. Specifically, fully strengthening and aligning its business model to its value proposition will require analysis and adjustments to its profit formula. At the time this capstone is being written, Ed First has taken steps to clarify its value proposition, and it has allocated resources and identified key processes to become a more jobs-aligned and efficient organization. The business model framework suggests that when an organization needs to become more financially sustainable it should clarify its value proposition, and then work its way

counter-clockwise to identify the profit formula first and then determine what processes and resources can deliver value within those financial constraints (Christensen & Johnson, 2009). On the flip side, when the organization is attempting to improve quality or impact, it should clarify its value proposition and then work its way clockwise around the framework, identifying what resources it needs to deliver that quality, what processes are required to translate those resources into value and then what can or should it charge to meet those quality demands and requirements.

When partners allocated resources in the 2017 budget and set the priorities for process improvements, they were doing so after roughly three quarters of a highly financially-constrained environment. Simultaneous to the JTBD analysis, they set a realistic, but very-conservative sales target for 2017, substantially below rough estimates for what the proposed, reinvigorated business development engine for the firm could generate in terms of sales. Partners then allocated resources within those boundaries. It is unclear if the resources currently allocated are sufficient to deliver on the priorities and the JTBD that clients have articulated. Thus, if revenue targets are not hit, it could be that Ed First wrongly interpreted the market's potential size, or that Ed First may have not invested the appropriate resources in its internal systems to foster and sustain growth. **I recommend, over the next year, Ed First continue exploration of its costs and fee structures, as well as continued investment into the development of impact measures, data systems and key performance indicators.**

Lastly, as I stated in the Review of Knowledge for Action, creating value for employees, particularly in a mission-driven industry like education, can translate into value for the clients and the customers. Ed First's staff retention is strong. Yet, I believe

Ed First could go even farther in understanding the social, emotional and functional needs the organization is providing for its staff. This analysis would help the organization pressure test how they compensate, incentivize, attract and maximize the talents and expertise of current staff. This approach could also provide a better understanding of the JTBD of potential new staff so that they can increase their recruitment and hiring that align to the leadership profiles necessary to be competitive in new and existing markets and aligned to the organization's value of diversity and equity. **The JTBD framework has great potential to help the firm better understand the needs of its current (and potential future) staff that serve as the lifeblood of the organization.**

Implications for Sector

Over the course of my career, I have heard the constant refrain of how hard it is to measure impact in education. At the district office, I heard folks comment on how unfair it would be for their department to be measured by student achievement since that work really belonged to classroom teachers and building leaders. As a classroom teacher, my fellow teachers would say that the standardized achievement tests were not an accurate read of their impact because poverty or other home factors were out of their control. Up and down and across the education system, organizations shy away from measuring impact for a whole variety of reasons. I am not proposing that organizations should claim correlations that statistically are not theirs to claim. **Education organizations and their leaders need to clarify whom they specifically intend to serve and what change they directly hope to make.**

I posit that part of the struggle to measure impact is that the purpose and strategy of organizations are not clear or sound in the first place. In Mark Moore's words, they are unclear about the public value they are trying to create. Education organizations need to first start there and be clear about why they exist, what demonstrable changes they seek to create and what they see as the chain of events that translates their impact to students.

In many ways, the Race to the Top initiative created pressure on an existing public system that was not ready to meet the demands required for taking on the commitments introduced through that legislation and grant opportunity. That pressure created a need for greater support to those systems that a number of entrepreneurial leaders seized. As a result, there has been a significant increase in organizations that play

a partner role to schools, district and state agencies. However, these organizations, like school systems, are often not clear on their theory of action, nor how specifically they think what they do will translate to change in the sector and ultimately for students.

This is not to say that this is true for all education partner organizations. In fact, there are many organizations whose missions and defined impact are clearly defined and aligned with their clients' JTBD. However, I posit there are many more organizations where this is not the case. **For there to be any hope for public agencies at any level to take full advantage of what these partner organizations have to offer, the organizations themselves need to further clarify what it is they do, for whom and how** so that the agencies can begin to knit together how their value can be married with the operational capacity and value that is being created in other parts of the system. For example, if school districts had a clearer sense of what consulting or other external partners could offer in concrete terms, they could better understand how those supports might free up their own internal capacity to focus on different areas. One way education organizations can get to greater specificity is by utilizing the JTBD methodology. This process forces an identification of the clients an organization intends to serve and puts the organization in direct contact with them to understand their functional, social and emotional needs.

Relatedly, answering the question “how will you know,” education leaders in both the public and private sectors could benefit from analyzing and designing their organizations using the business model framework. Imagine if schools thought of themselves as a business. Rather than create a school improvement plan (that usually sits

on a shelf after its submitted to the state as a compliance exercise), school communities could be engaged in a process to:

- understand their value proposition through the eyes of families, students and education research
- align resources to best deliver on that value
- identify and develop the key processes necessary to ensure the resources are actually translated into the value sought, and
- work with system leaders to align school budgets and hiring plans to adequately resource the organization to deliver on the value proposition.

There are a number of important stakeholders to engage and policy changes that would need to occur to actualize this vision. Too often, best practice from business is dismissed and the age-old adage “students are not dollars” surfaces. There is a great deal that the education sector could take from business theory. In particular, business theory is rooted in the notion that an organization must really know its market if it is every truly going to serve it well, and if it does not align its resources and processes (or cannot because of inflexible bureuacracy), the value can never be realized. This framework could not only serve as a tool for planning, but also a tool to unearth where, in our current system, we are setting schools up to fail.

Similar to the business model framework, the JTBD methodology has the potential to help us rethink public educations sytems and schooling. Starting at the student level, similar to Southern New Hampshire University’s (SNHU) approach, school systems could use the JTBD theory to redesign the student and schooling experience. Public education in the United States has remain largely unchanged since the early 1900s.

As our student populations become more diverse, as employers demand a higher skill of their workforce, and as our society faces seemingly intractable problems, more and more is being asked of our public schools. Now is the time to marry what we know about preparing students for a cognitively demanding world with a deeper understanding about the needs and culture of our students to design learning environments for the 21st century.

Lastly, applying the JTBD theory to the education workforce might help us rethink how we define the professional roles within education. If education organizations want to address issues of turnover or the lack of diversity among educators and education leaders, they need to better understand what job their aspirational recruits need done (whether it be to attract and retain more men or more top college graduates or more leaders of color), and education organizations (including the unions that represent these potential employees) could rethink how roles are defined, incentivized and supported to deliver on that job for the employee. As noted in my RKA, business research supports that value for employees, particularly in a mission-driven industry like education, has the potential to translate into value for consumers. If leaders in the public education sector began to apply this theory of action to their own workforce, the value translated to students, their families or and other direct consumers, could exponentially increase, creating reciprocal value within the system.

Conclusion

By stepping back to assess its business model, Education First has taken an important first step towards aligning its resources, processes and profit formula to deliver even more value to the field. Over a short period of time, I was able to mine and triangulate a variety of data sets and employ a change management approach to guide the firm's leaders in articulating what jobs their clients hire them to do. This served as a springboard for what continue to be ongoing conversations to more specifically identify the clients Ed First wants to serve and what impact it wants to have. Early results indicate my efforts had an impact on partners and partner decision-making and have the potential to impact the firm's overall financial stability and positioning in the market.

There are important lessons in Ed First's story for leaders working both inside of the public education system and those working from the outside to support it. Compared to the private sector, resources in education are scarce and thus it is even more important to think about how people, time and money are used well. Doing so not only requires a clear articulation of what the organization's purpose is, whom it intends to serve and how, but also a deeper connection to the functional, social and emotional needs of students and their families and the teachers we employ to support them. If we want to see our students succeed, we need to start thinking about how we can design with students needs at the center and then align the appropriate resources and processes to deliver on that value better. Our school systems are still built for a purpose that is more than a century old and does not reflect the needs or demands of students today.

As stated by Tushman at the top of this paper in the context of business, the same can be applied to education: "Who are we, and what do we do? Senior leaders often do

not attend to this identity question. They close their eyes to what's going on in the world" (n.p, Gerdeman, 2016). Education organizations, especially education partner organizations, have the chance to maximize their impact if they move away from the generalities found in missions and visions across the education space and get concrete about who they serve, how and why and take steps to measure and communicate that impact. I will seek more ways to promote this message and look forward to opportunities for cross-pollination between business and education as a way to bring greater value to the education sector.

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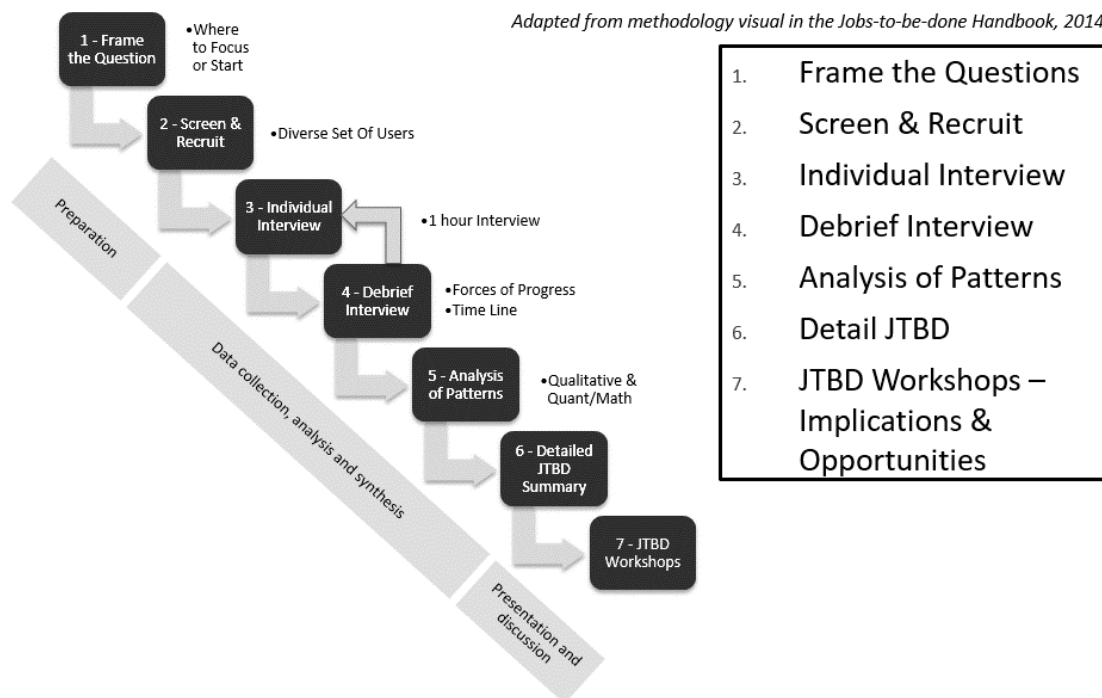
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Appendices

Appendix A



Slide created for all-staff presentation in 2016 to provide an overview of how clients were selected and prioritized for the JTBD interviews.

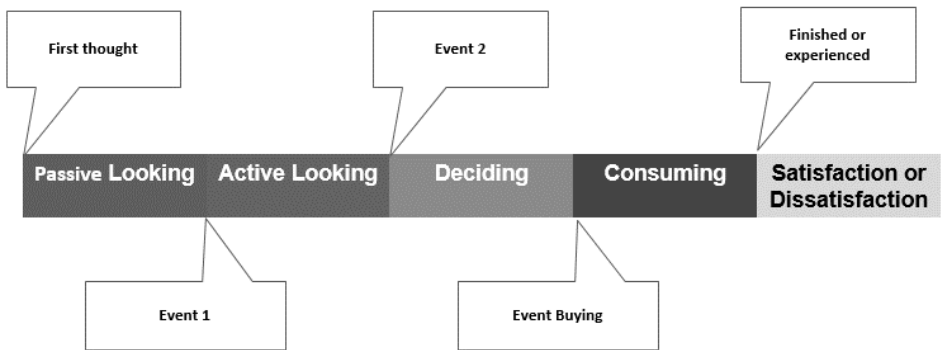
Appendix B

For the jobs-to-be-done interviews, 10 clients were selected to be interviewed based on a diverse set of criteria

Won and lost (at least 3)	Client type	Repeat business (Y/N)
Bid through RFP (Y/N)	Client size	Contract award size
Geography (where the work was done)	Type of service provided	Gender/race of those being interviewed

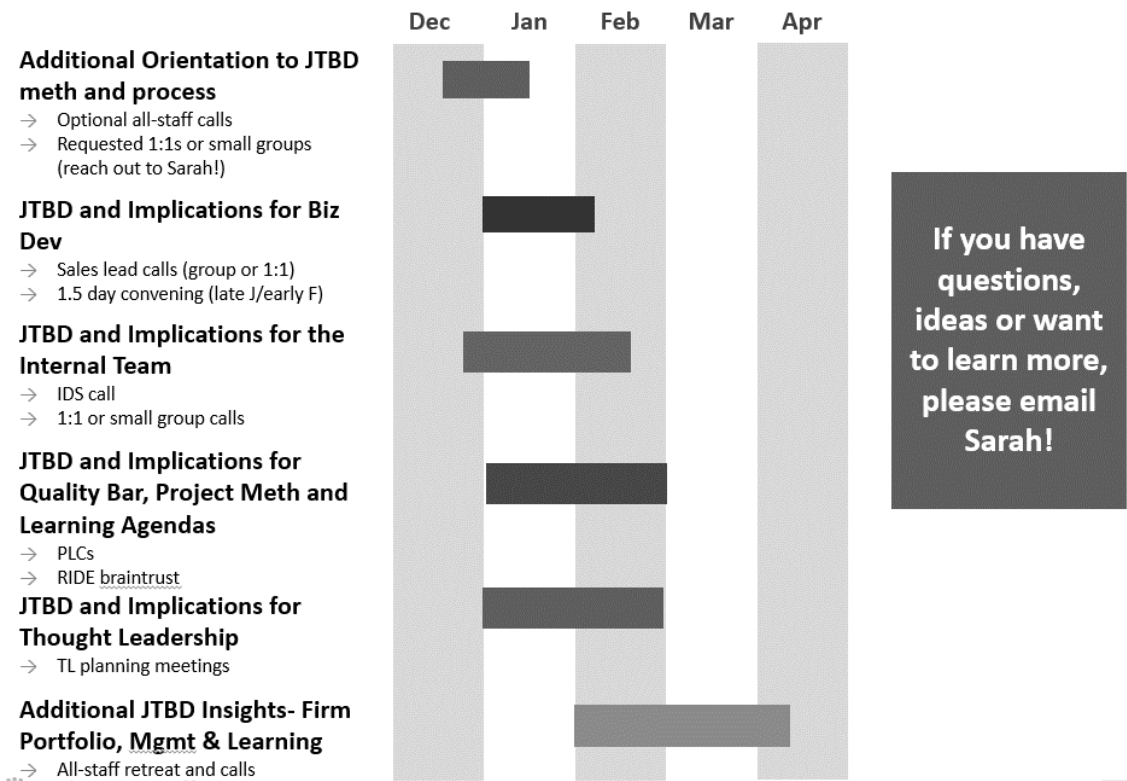
Appendix C

So, how does it work? The JTBD interview process includes reconstructing a timeline...



Appendix D

JTBD Engagement Opportunities



Appendix E

Business Development Convening Agenda

February 1-2, Location: The Argonaut in San Francisco's Fisherman's Wharf

Jan Pre-Convening Meeting Objectives (3 meetings)

- *Ground ourselves in the firm's historic business development efforts and outcomes,*
- *Share sales, portfolio, and revenue targets for 2017*
- *Discuss the intersections of the firm's RIDE goals, Thought Leadership work and biz dev efforts*
- *Surface what top sellers see as the most significant challenges and opportunities in business development*

Feb Convening Objectives:

- Through the lens of the JTBD findings, other portfolio analysis, and the experience of Ed First sellers, employ design thinking to co-create how we are defining the "big bets" for 2017 biz dev
- Inform the early design specs for the infrastructure (i.e. data reporting, meeting structures, incentives, tools and supports) and resources (people, time and money) necessary to consistently support business development across top sellers
- Identify next steps, their owners and the timeline to keep the biz dev retool efforts moving forward

Pre-work:

- *Re-review (pre-work from Jan pre-convening calls)*
 - *The Biz Dev analysis provided to partners at the Dec partner retreat*
 - *JTBD deck*
 - *Chapter 2, "Build It and They Will Come: But only if you let them know that you've built it", of Million Dollar Consultant by Alan Weiss*
- Ensure any active sales pipeline data is input into the Force by Friday, Jan 27 (or amended if there are updates to something already in The Force); take a look at what is currently in the active sales pipeline between Jan 30-Feb 1
- Read the Biz Dev convening pre-work deck and reflect on the questions posed.
- Reflect and respond to the following questions Friday, Jan 27 via this [survey link](#):
 - 1.) *What opportunities ("who" or "what") do you see one layer down in each of the prioritized jobs (Learning & Network Accelerator, Facilitator/Politics Navigator, Co-Creator)? In other words, who are Ed First's best clients for these jobs and what specific services/supports could we offer?*
 - 2.) *If you could lead a biz dev strategy for the firm, what would the focal point of that strategy be? (don't limit yourself to just the existing Focus Areas, but if that is how you would answer, please do)*
 - 3.) *What are the top 3 things you would encourage Ed First to pursue as part of its "big bets" for 2017?*
 - 4.) *What are the 3 things that would enable you to focus more consistently sell and/or authentically sell?*
 - 5.) *What are the 3 things that are most holding you back from consistently selling and/or authentically selling?*

OPTIONAL: Read the "Interlude I: The Yin and Yang of Clients and Prospects" from Million Dollar Consulting

Meeting Agenda:*(All times in PST)***Wednesday, February 1 (8.5 hours)**

Time/Attendees	Agenda Items	Description	Session Lead
7:30-8:30am	Hot breakfast available (and Coke Zero ☺)		
8:25am	Tech set-up	▪ Please use this time to ensure that your Zoom account is functioning properly ▪ Reach out to PSAV if you need support ▪ Do Now- Use a post-it to answer- <i>What is your big hope and fear for this convening?</i>	
8:30-8:45am	Welcome	▪ Framing ▪ Review objectives ▪ Agenda review ▪ Frameworks to keep in mind during our conversations: ▪ Bus model framework & JTBD ▪ Matrix Map- Impact & Profit	Session Lead: Susan (Sarah to support)
8:45-9:15am	Empathize & Define- Listen/Observe. Clarify the Problem.	▪ Why a design thinking approach for Day 1? ▪ Norms ▪ Recap of what we've learned, what problem we are here to solve ▪ Surface responses from Do Now- <i>What is your big hope and fear for this convening?</i>	Session Lead: Sarah
9:15-10:45am	Ideation – Stimulate Creativity. Generate More Ideas. Refine Context.	▪ Saturate and sort- ▪ Saturate (quantity over quality at this phase): Given the JTBD analysis, the firm data we've explored and your own interests/instinct- ▪ What do you see as the most promising “big bets” for 2017? Sort: What themes or trends do you see in the data? ▪ Prioritization- Which feel like the most promising considering each of the following criteria: ▪ Market growth (quantity/competitor analysis and funding sources) ▪ Size of contract award (allows to move org towards 100K+ contracts) ▪ Ease of entry given current firm capacity/skills/resources ▪ Impact/mission alignment ▪ RIDE alignment ▪ Personal passion and interests	Session Lead: Sarah

		▪ Discussion and landing the areas to workshop for prototyping session ▪ Equity Pause- Does it feel like what we prioritized to prototype, on its face, represents work that could substantially move our RIDE agenda forward?	
10:45-11:00am	Break	▪	
11:00-12:00pm	Prototyping– ROUND 1 Make it Real. Refine.	▪ Self-selected breakout groups of 2-3 people (with a team lead identified in the moment) will work on workshoping what the strategy would look like in one of the priority “big bet” areas identified in the previous session: ▪ -Who would the likely client types be? Who would the actual clients potentially be? ▪ -What problems would you be solving for them? How? ▪ -What would it look like to advance our equity agenda through this work? ▪ -What would you need to successfully activate this strategy? (resources, re-usables, thought leadership, etc.)	Session Lead: Sarah
12:00-12:30pm	▪ Grab lunch/break (salad and build your own fajitas)		
12:30-1:00pm	Testing- Check assumptions. See what works and what doesn’t.	▪ Over lunch, groups will partner up or work in triads to share their ideas and, using a protocol, have the other group’s pressure-test those ideas. ▪ Groups will take that feedback and iterate on their prototypes one more time before sharing with the full group.	Session Lead: Sarah
1:00-2:00pm	Testing- Iterate.	▪ Participants can self-select into new working groups (or stay with their original). The work now is to take the feedback plus any new ideas from new group members to further evolve (or offer a new direction within) the “big bet” areas	Session Lead: Sarah

2:00-3:45pm	Reflection, Discussion and Prioritization	▪ We will engage in a share out by “big bet” area. Anyone who worked on/in that area can share during that time period. Participants will be listening for/tracking: ▪ -Trends heard across groups ▪ -Ideas that feel the most promising to pursue after the convening ▪ Discussion- Which feel the most promising to pursue for 2017 (knowing we can’t do it all)? may do a dot voting exercise at this point using the criteria from the morning ▪ Landing-Recap of decisions made, which will guide, in part, infrastructure planning on Day 1/2	▪ Session Lead: Sarah
3:45-4:00pm	▪ Break (<i>Freshly Popped Popcorn, Assorted Candy Bars, Trail Mix, Assorted Soft Drinks & Juice</i>)		
4:00-5:00pm	Infrastructure Planning (Part 1)– What will Ed First need to start, stop, or continue to pursue the business development strategy we just decided on?	▪ Overview of what placeholder resources have been allocated in the budget ▪ Presentation and discussion- what do we see as the biggest infrastructure challenges to deliver on the priorities we have set? ▪ Will get into self-selected small group workshopping (ideation and prototyping) with team captains on: ▪ -Overall biz dev management + data analytics + meeting infrastructure ▪ -Incentives and development for selling efforts in the firm ▪ -Proposal development ▪ -Re-usables/resource build-out ▪ -Other? (<i>there may be a category participants offer that’s another group we haven’t thought of</i>)	▪ Session Lead: Sarah
5:00-5:30pm	Reflections and wrap-up	▪ Let’s revisit the brainstorming we did first thing this morning, does anything we left behind this morning feel like it should be revisited on Day 2? ▪ Equity Pause- Do we believe where we landed offers a rich opportunity to advance our RIDE agenda? ▪ Recap decisions and next steps ▪ Plus/deltas ▪ Overview of day two	▪ Session Lead: Susan

5:30- 7:00pm	Adjourn (maybe convene small group leads to debrief what they heard in small group conversations and how that might inform what we do on Day 2; partners huddle to check-in on progress of Day 1 and make adjustments for Day 2)
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Thursday, February 2nd

Time	Agenda Items	Description	Session Lead
	Hot breakfast available (and Coke Zero ☺)		
7:55am	Tech set-up	- Please use this time to ensure that your Zoom account is functioning properly - Reach out to PSAV if you need support	Session Lead: Susan
8:00-8:15am	Welcome	- Agenda review - Round-robin on takeaways from the previous day - Recap- where did we land at the end of Day 1	Session Lead: Susan
8:15-9:45am	Continuation of Infrastructure Planning	- Share-out of what small groups came up with on Day 1 re: infrastructure planning - Group discussion of what small groups (starting with overall biz dev mgmt./infrastructure and incentives) - Prioritization exercise (if needed) re: what infrastructure to revisit in what order and on what timeline	Session Lead: Sarah
9:45-10:00pm	Break		
10:00-11:15am	Work Planning for Feb and Mar	- Participants will self-select into a “big bet” area and will engage in team-based and individual work planning (<i>knowing that other sellers and staff who aren’t present will also be brought into the fold later</i>) - What existing opportunities do we see in our biz dev area for Feb/Mar? (client relationships or other) - What new opportunities are we going to pursue? - What goals can we set for Feb/Mar? - What are the 2-3 things I most need to make reach those goals?	Session Lead: Sarah
11:15-12:00pm	Commitments and Close-out	- We will whip-around and share the big commitments we are individually making to the team and biz dev moving forward (can also include share out from the previous session) - Convening survey - Summary of next steps	Session Lead: Susan & Sarah