## Official Newsletter of the Andersen Alumni Association



## Straight Thoughts, Straight Talk

"Serving Andersen Alumni Worldwide"

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## Sponsored By



## **Editorial**

Spring is here and I am grateful. In Georgia it's easy to tell by the pollen dust covering everything. The azaleas and dogwoods have put on a spectacular show and this beautiful display was showcased this past weekend in Augusta, home to Augusta National and the Master's. As a side note, Augusta National was a prestigious client of the Atlanta Office. It was the 88th Masters and Scottie Scheffler won his second green jacket. Here are a few other things that I am grateful for this spring:

- Andersen Alumni Association picked up a new sponsor BGS Consulting, led by alumni Brendan Giuseppe, and
- A record number of alumni thought leaders contribute content to this quarter's e-newsletter.
- My Andersen Connections

A big thank you to Brendan and the alumni contributors for making this edition such a success.

We need your help to further strengthen and maintain our Alumni network. Please leverage our Social Media Presence and <u>LIKE our Facebook page</u> and <u>JOIN our LinkedIn network</u>, and lastly you can <u>FOLLOW us on LinkedIn</u> as well.

As Always Think Straight Talk Straight....

Warren Turner Editor

## Save the Date ... Mark Your Calendar

There are a couple of Alumni Reunions in the works

Cleveland, OH

Please join us on Thursday, May 9th at the Wild Eagle Saloon in Broadview Heights. Please click this link to RSVP: https://lnkd.in/gU8c7pvG

Washington DC / Tysons Corner, VA

Please join us Thursday, May 16 at Westwood Country Club in Vienna. Please email Barry Reisig for Registration information <a href="mailto:barry.reisig@gmail.com">barry.reisig@gmail.com</a>

If you are aware of Alumni gatherings please let us know by emailing details to admin@andersenalumni.com

## 5<sup>th</sup> Edition Alumni Directory Project

We are pleased to roll out an early announcement. We will be partnering with PCI for the 5th time beginning in October of this year. The focus will be updating data so that the resultant Alumni Directory Publication is as accurate as possible. The value of connection, engagement and networking has never been more important.

PCI has been a trusted partner and celebrates decades of partnering with Alumni and Membership organizations. Please be on the lookout for a postcard and email in October 2024 giving you the opportunity to call PCI at a dedicated 1-800 number to insure your current data is up to date. We want to hear from you. Thank you in advance.

## Alumni On the Move

+ Follow us on our LinkedIn Company Page for the latest information on fellow alumni on the move.

If you have recently changed jobs and would like to share your good news with other Alumni, please email details to

Admin@andersenalumni.com





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# Entrepreneurial Spirit: BGS Consulting Founder Credits Arthur Andersen Roots for Firm's Success.

By <u>Brendan Giuseppe</u>, Andersen Alumnus, Founder and Managing Director of BGS Consulting

Brendan Giuseppe, the founder, and CEO of BGS Consulting, began his career at Arthur Andersen in Washington DC, where he learned the importance of client service and treating others with respect and the attitude that we support one another for the common good. "Think Straight, Talk Straight" and "Helping In Ways You Never Imagined" were not just catchy phrases at Andersen, they were truly our way of life. These lessons were engrained in us and demonstrated through our actions as we lived these principles every day with unwavering commitment to each other and to our clients.

After working in audit at Andersen for the first eight years of his career, Mr. Giuseppe was asked to support a new function within the firm - Business Development. He made the switch to Business Development where he worked directly with the partner group to identify, pursue and win new work in the market as Andersen was expanding its non-audit advisory and consulting services. After 12 years at Andersen, Mr. Giuseppe continued his Business Development career at Deloitte, RSM and MorganFranklin Consulting before starting BGS Consulting in 2016. Having seen the best of the industry at Andersen, Mr. Giuseppe wanted to be part of an organization that truly followed the principles he saw and lived by while at Andersen. Hence, he decided to recreate these principles and way of life by starting his own firm and the journey began.

BGS Consulting has evolved over time and the Andersen influence and presence has grown with it. Frank Mencini joined the firm in late 2023 as a co-leader and Managing Partner. Mr. Mencini spent 14 years at Andersen (1989-2002) in the Washington D.C. market and helped build the local Healthcare Consulting Practice. As a former Andersen partner and public board member, Mr. Mencini brings a high degree of integrity and business acumen to BGS Consulting. Mr. Mencini will continue to support our growth through client service, talent acquisition and forging new strategic partnerships in the market. In addition to Mr. Mencini, Bruce Prouty (Andersen 1988-1991) is the Chief Operating Officer of BGS Consulting and oversees all operations and ensures the firm's values and principles are followed. Finally, we have two former Andersen partners on our Advisory Board, CE Andrews and Paul Feeko. Mr. Andrews held positions of increasing responsibility, including key leadership roles in the metropolitan Washington, D.C., office, Mid-Atlantic Market Circle, Southeast Region, U.S. National Practice, and Arthur Andersen Global. Mr. Feeko ran and built our

Transaction Advisory Services Practice in the Washington D.C. market and served our largest M&A clients.

BGS Consulting is an accounting and finance advisory services firm, headquartered in the Washington D.C. area. BGS Consulting provides operational and project support to its clients to meet their evolving accounting and finance needs. BGS Consulting provides solutions and resources to their clients where they may lack capacity or expertise to achieve their day-to-day needs or mission-critical projects.

Today, BGS employs over 50 professionals and continues to teach that clients are not defined by statements of work or engagement letters, but rather, by our genuine and sincere interest in helping others in whatever way we can. We know if we do the right things and help others with their agenda and interests in mind, not ours, that we'll develop the right mindsets and behaviors within our firm. The core values embraced at Arthur Andersen, including a relentless pursuit of quality, ethical practices, and a client-centric approach, have been woven into the culture at BGS Consulting. Clients of BGS Consulting experience the Andersen way of industry-leading expertise and a commitment to high standards of integrity and professionalism. We focus not only on delivering unique solutions to our clients (the "what") but also on the "how" we deliver, meaning we strive to be a very user-friendly firm and bring a very flexible and nimble approach to our client delivery model. We want to achieve outstanding results for our clients while fostering long-lasting relationships.

As BGS Consulting approaches its eighth anniversary, Mr. Giuseppe expresses immense gratitude to the roots he cultivated at Arthur Andersen, recognizing the pivotal role that Andersen played in shaping the culture and operations at BGS Consulting.

## Throw the Bums Out, But not My Bums

By Gary Thomson, Andersen Alumnus and currently a Managing Director at Thomson Consulting

The phrase "throw the bums out, but not my bums" is most related to politics. We're ready for a body of elected official to change, but my person, they're not the problem. There's great passion about change, just don't make it uncomfortable for me. I'm not suggesting we have "bums" in our firms, but we have situations that resemble the context of this phrase. Let's talk about a scenario that unfolds all too often in the world of CPA firms, and it's about how partners and leaders approach change. Picture this: There's a buzz of ideas and plans for change in a strategic planning meeting or partner retreat. Everyone seems on board, nodding in agreement, maybe even championing change. But then, as the dust settles, you hear whispers like, "Well,

I don't really need that, but it's great for the others. My way or my process is better, let the "bums" adopt to changes, not me." Sound familiar?

This kind of talk sends mixed signals. On one hand, there's vocal support in the moment of decision-making, but on the other hand, there's a quiet step back when it comes to embracing these changes. This passive-aggressive resistance sends the message that some feel they're above the decisions the firm has collectively made—even if they were part of making those very decisions!

. It's not often I see vocal and aggressive resistance once a leadership group has initiated change. However, encountering someone who's passively resisting change? Now, that's not uncommon.

So, what does it mean to embrace change and adopt a "firm-first" mentality?

It's about being open to adapting, even when the changes might not seem to benefit you directly. It's recognizing that if it's good for the firm, you're on board to support and implement solutions.

It means having a predisposition toward accepting and adapting to change rather than looking for excuses to reject or resist it. This includes being a vocal advocate of and being positive in demeanor about the change.

It's about not being complacent. Embracing change is essentially embracing growth, pushing beyond the comfort of the status quo.

It can sometimes be hard for leaders to want to embrace change when it doesn't directly benefit them. Having a "firm-first" mentality isn't just beneficial; it's essential. What's best for the firm ultimately benefits everyone involved. Here are just a few reasons leaders should embrace the change:

It builds trust within the organization. When leaders show they're willing to adapt, even when it's not convenient, it strengthens the team's faith in them.

It nurtures a positive culture, as opposed to eroding it. Leaders who embrace change encourage a culture of growth and adaptability.

It sets a powerful example for future leaders, showing that success is about looking beyond personal preferences for the greater good of the firm.

Supporting decisions, even those you weren't directly involved in making, is crucial. Different governance structures mean not everyone makes every decision, but all leaders should stand behind the firm's choices. And, when you are given the opportunity to participate in decisions- speak up! However, once the decision is made, it's time to commit to being "all in."

As leaders, our focus should be on being solution-oriented—thinking about how to communicate and implement changes effectively rather than resisting change for the sake of resisting change. It's about leading by example, embracing change,

and putting the firm first because, in the end, a thriving firm means success for all its members.

If I can help you or your firm with change management feel free to reach out to me <a href="mailto:gary@thomsonconsulting.com">gary@thomsonconsulting.com</a>

# New Book Release: The Inside Innovator: A Practical Guide to Intrapreneurship

By Louis K. Gump, Andersen Alumni

Are you a changemaker who wants to achieve, grow, and build more within your organization?

If you're like many people, when you think of innovation, you think of entrepreneurs. And gifted entrepreneurs have written countless books for gogetters starting their own businesses. But what if you're a visionary who wants to innovate effectively within the framework of your larger organization? Far too often, you've been left to reinvent the wheel, over and over again... until now.

In this inspiring, yet practical primer, award-winning intrapreneur Louis K. Gump shines a light on the efforts that occur behind the walls of many organizations-from global business titans to local market leaders; from charitable nonprofits to government entities; from educational institutions to informal community groups and beyond; these are the places of the in-house innovators, the explorers, the intrapreneurs, who create value through innovation and growth, inside of a larger organization. Inside you'll find:



A PRACTICAL GL
TO INTRAPRENEUI

- The Top Characteristics of Successful Intrapreneurs
- The Differences Between Intrapreneurship and Entrepreneurship
- The 3 Core Principles at The Heart of Business Innovation
- Why We Need Intrapreneurs to Train the Next Generation of Leaders
- The Top Ways that Intrapreneurs Push Established Organizations to Adapt and Improve Value Creation

 Intrapreneurship as an Essential Tool for Achieving More, Building Stronger Relationships, and Increasing Personal Fulfillment

With insights from interviews with industry leaders and Gump's decades of experience, *The Inside Innovator* will help readers achieve more, build stronger relationships, and increase personal fulfillment through intrapreneurship.

Louis K. Gump has worked with some of the most recognized companies in the world, developing talented teams and achieving remarkable success for growth businesses. After graduating from business school, he worked with Andersen Consulting, based in Atlanta. He later presided over award-winning mobile businesses at The Weather Channel and CNN. More recently, he has served as CEO of two digital media firms and led Cox Media, the advertising division of Cox Communications. Gump has also held leadership roles in a wide range of industry and community organizations, including ten years on the board of the Mobile Marketing Association. He earned an MBA from the University of Virginia Darden School of Business and a BA from Duke University. You can connect with Louis through his website or LinkedIn, or by following him on X (Twitter): @louisgump

# Is Legacy Infrastructure Holding Your Company Back? Best practices to overcome technical debt

By <u>Jim DeLoach</u>, Former Andersen Partner and currently a Managing Director at Protiviti. He is the author of several books and a frequent Forbes and NACD contributor. Copyright 2024 Corporate Compliance Insights. This article originally appeared on Corporate Compliance Insights and can be found <u>here</u>. Reprinted with permission. No further reproduction is permitted without permission from Corporate Compliance Insights...

Culture, speed to market, customer focus and organizational agility are mainstays in C-suite and boardroom conversations about innovation. But as Protiviti's Jim DeLoach explores, these discussions should also address technological roadblocks to realizing innovation initiatives.

The origin of the phrase "Innovate or die," is unclear. But it was made famous almost 40 years ago in one of Peter Drucker's classic books, "Innovation and Entrepreneurship: Practice and Principles." In it, Drucker wrote that the entrepreneur sees "change as the norm and as healthy ... [and] always searches for change, responds to it, and exploits it as an opportunity." Given today's business realities, these words are timeless, as they refer to the importance of agility in the marketplace.

According to a global survey of board members and C-suite executives, the rapid speed of disruptive innovation enabled by new and emerging technologies is ranked among the top risk issues for organizations over the next decade. To face the future confidently, senior leaders and the board need to understand the extent to which the organization's legacy infrastructure either enables or constrains the effectiveness of initiatives to respond rapidly and continually to emerging opportunities, competitive threats and customer demands.

While there are many aspects underpinning an innovative culture, technical debt – the cost and magnitude of additional rework caused by the accumulation of legacy systems and application solutions that were easier to implement over the short term but not the best overall solution for the long term – can be a powerful restraint to inculcating innovation into an organization. Because technical debt can result in a legacy infrastructure that is difficult to maintain and support, many incumbents face formidable challenges as market forces demand ever-higher levels of resilience in adapting business models, processes and systems to meet continuously changing expectations.

A survey of more than 1,000 CIOs, CTOs, CISOs and other technology leaders was conducted last year to understand how IT organizations are ushering legacy infrastructures into the digital era to enable innovation that will fuel long-term value creation. According to that study:

- Only 29% of respondents indicated that innovation leaders bridge the gap between technology and business needs very well, suggesting that more work is to be done to understand innovation goals and how they align with the business.
- Organizations are spending an average of 31% of their IT budgets and investing, on average, 21% of their IT resources on managing technical debt. Of note, nearly seven out of 10 organizations (69%) believe that technical debt has a high level of impact on their ability to innovate.
- In addition to the universal concerns over proliferating regulatory and compliance requirements and security risks when it comes to innovation, survey respondents also noted a lack of governance and infrastructure, innovation investment justification and organizational structure (e.g., teams and processes). The top five skills-related gaps impeding innovation are design thinking, solution architecture, enterprise agility, technical knowledge and strategic thinking.
- As expected, cybersecurity is a critical innovation-related issue. Globally, a strong majority of organizations (82%) have a high level of concern about security risks associated with implementing new innovative technologies.

Why should executives and directors care about these findings? In an environment dominated by emerging technologies, disruption of business models and universal acknowledgement of the importance of agility and resilience to corporate success, innovation is a strategic imperative. Unfortunately, all efforts

to instill an innovative culture can be frustrated when technical debt has "accrued" to such a level that it slows organizational response to emerging market opportunities and stifles the ability to compete in a digital world.

A key takeaway for executive teams and the board is understanding the impact of technical debt on innovation goals and strategies. Technical debt is often likened to monetary debt in the sense that if not addressed, it can accumulate "interest" over time as technology evolves, necessitating additional effort in future development. As the cost of "repaying" the debt becomes more difficult and expensive, it is no surprise that companies are allocating a significant portion of their annual IT budgets to manage it.

The aforementioned research offers a call to action to increase agility and sustain the company's innovation and transformation journey successfully over the long term.

## Modernize legacy applications.

In the digital era, organizations need engaging, intelligent and easy-to-use applications for their customers, employees and business partners. Initiatives to modernize applications should significantly improve user experiences by providing more functionality and insights to meet user needs and improve competitive position with "born digital" players. They can also lead to new insights that spur innovation and new digital services and product lines that create new revenue streams. Thus, organizations should focus on reducing technical debt that is time-consuming to manage and resource-intensive to support. Outdated technology increases operational and cyber risks.

There are several proven tactical approaches to mitigate technical debt:

- Create a greenfield: To support new products or markets, some organizations may see opportunities to start with a clean digital slate by building new infrastructure from the ground up based on modern technologies. Of course, this is unlikely to address the technical debt of the existing enterprise.
- Ring-fence as a quarantine: In some cases, technical debt can simply be isolated from the rest of the operating environment, especially for infrastructure and supporting business processes designated for retirement.
- Preserve and protect: For some stable infrastructure, the right approach may be to build a services layer around the system. By deferring the inevitable upgrade or replacement of the systems in question, the company buys time to plan an effective solution.
- Simplify and rationalize: Streamlining technology where opportunities permit allows businesses to address some forms of technical debt. This approach may be best suited for organizations that have grown through mergers and acquisitions.

- Go big: Some organizations may be able to use the rip-and-replace process on existing systems to reduce technical debt aggressively by upgrading to a more modern infrastructure. While this option has potentially high rewards, the associated risks should be considered carefully.
- Upgrade and replace in phases: This approach represents a migration path whereby technical debt is reduced over time through a risk-sensitive phased upgrade or transition to newer technology platforms. For example, it may entail building a parallel infrastructure with temporary "scaffolding" to support the transition to the desired future-state environment.

The above approaches are dependent on the current state of an organization's technical debt, existing documentation, institutional knowledge, appetite for risk and resources available. They are not mutually exclusive and can be combined to address different systems and requirements. For example, cloud solutions can avoid future technical debt while shifting some of the maintenance burden to the cloud services provider.

## Improve agility through rapid response and strong operational resilience.

Orchestrate the building of resilience across existing domains such as business continuity, disaster recovery, technical recovery, cyber resilience and third-party asset management so they can readily respond to outages, crises and other threats.

Capitalize on the emergence of advanced technology platforms and capabilities. Leverage new platforms and architectures for building and running business applications to enable better access to data, provide flexibility and faster time to market, and support digital capabilities to deliver differentiated experiences. Deploy greater process automation and intelligent technologies such as artificial intelligence (AI) models, including generative AI, machine learning, the Internet of Things and 5G, cloud computing and robotic automation capabilities to reimagine existing processes and alleviate risks arising from the inevitable shifts in labor availability and costs.

## Maximize customer engagement.

Focus on the experiences of users and consumers (both positive and negative) to drive interaction through a modern, innovative operating model. Decisions based on insightful customer data and sufficiently advanced user analytics and Al are more likely to achieve business success.

Prioritize cybersecurity and data privacy in innovation activities but avoid creating bottlenecks

Proper cyber hygiene is foundational to managing security risks and maintaining resilience of business services. Companies should harness the power of effective cybersecurity frameworks to mitigate cyber risks without slowing down innovation and should search for opportunities to boost enterprise value with novel tools such as greenfield cloud environments.

Consider implementing practices that balance identity and access management to ensure maximum speed of user access while managing risk and complying with applicable legal and regulatory data privacy requirements for collecting, storing, securing, processing, using and monetizing sensitive data. More importantly, understand why the organization obtains and retains the data in the first place.

## Make your talent your customer.

A focus on the customer experience should extend to the organization's people and talent. Retention of key people requires efforts to keep them engaged long-term. That is why an advocate for the preservation of talent and culture should have a seat at the decision-making table as the organization focuses on sustaining its financial health. The organization's people should be privy to its strategy for deploying innovative technologies to augment their job functions. Senior management and the board should consider the above takeaways when discussing innovation goals and strategies. By listening to the voices of customers, employees and other stakeholders, businesses can identify technical debt issues and prioritize their infrastructure-modernization efforts. From the board's perspective, it is essential that constraints on critical innovation initiatives be addressed timely before the limitations placed on improving operational efficiency and adjusting business models become so egregious that they impair the organization's competitive position.

### Questions for senior executives and the board

Following are some suggested questions that executive management and the board may consider, based on the risks inherent in the company's operations:

- Are we satisfied with the organization's innovation strategy, culture and processes? Do our discussions of innovation investments address the costs, benefits and expected payback? Do the C-suite and boardroom agendas allocate sufficient time for discussing innovation, including consideration of appropriate innovation-related metrics that tell the full story regarding the results the strategy is delivering, return on investment and the effectiveness of the company's innovation capabilities?
- Is the organization agile and adaptive enough to recognize market opportunities and emerging risks over time and seize or overcome them with timely adjustments to its strategy and supporting technology infrastructure? Does it learn through data from customer and supplier

- interactions and is it able to convert lessons learned into process, product, service and business model improvements?
- Does the board and executive management have visibility into the extent and nature of the organization's technical debt and its impact on executing the strategy and innovating processes, products and services? Is there an actionable roadmap to mitigate the risk and cost of technical debt? Is there active governance in place to ensure that effective trade-off decisions are made so that technical debt is actively managed on an ongoing basis? If answers to any of these questions are no, why not?

Jim DeLoach, a founding Protiviti managing director, has over 35 years of experience in advising boards and C-suite executives on a variety of matters, including the evaluation of responses to government mandates, shareholder demands and changing markets in a cost-effective and sustainable manner. He assists companies in integrating risk and risk management with strategy setting and performance management.

## A Custom Project Management Roadmap for the New Normal in Manufacturing and Distribution

By Erin Koss, CPA is an Andersen Business Consulting Alumni (1993-1999), and CEO of Syte Consulting Group, Inc.

Scaling up is hard without a project engine in place. Despite funding and ambition, many manufacturing and distribution leaders hit hurdles when they're trying to transform strategy into reality. Gaps in expertise, inadequate systems or unclear roles could put the brakes on even your most well-intended growth plans.

Make no mistake, all growth initiatives are projects.

With the right project coordination model in place, you can create momentum and turn today's objectives into tomorrow's achievements. You can build structures and standards that are tailored to accelerate the initiatives that matter most while honoring your culture and evolving team.

This guide – the first in our project management series – explores how to pave the way for scalability by replacing ad hoc efforts with intentional project performance.

## The Biggest Signs You Might Have a Project Management Problem

Do you have a project management problem? How can you tell? Let's first explore common challenges that indicate a bigger project management issue might be happening.

Here are some signs that your manufacturing company needs better systems and structures to manage projects:

- Your teams seem to lack the right skills and staffing to successfully
  execute projects. You have key talent gaps in project management that
  cause delays and quality issues.
- Customers and leadership are frustrated with the outcomes of recent projects. Deadlines are missed, scopes creep and budgets are overrun.
- Vendors and partners are driving your projects more than your own teams. You feel like don't have enough visibility or control.
- Accountability is unclear. You don't have the right insights to understand who is responsible for different aspects of project performance.
- Cross-functional alignment is lacking. Silos mean execution is suffering, because your teams lack clarity on goals and decision-making.

Perhaps your project managers struggle because they have other competing priorities, too. Relying on functional managers to lead projects might be causing some of these problems.

If these challenges sound familiar, you're losing time, money and competitive advantage. Without better project management, this lack of accountability and coordination will continue holding you back.

The good news is there are proven solutions available. Keep reading to get options that can get your projects and teams aligned for success.

## How Large-Scale Transformation Projects Expose Project Management Weaknesses – and What to Do About It

As manufacturing and distribution companies pursue growth objectives and set the stage for scaling, they often embark on large, transformational projects that inevitably highlight challenges to seamless delivery. This can include problems with expertise, capacity and systems. While project management issues can impact initiatives of any size, manufacturers tend to see the effects amplified during these complex, far-reaching undertakings.

At Syte, we often see this in the context of ERP implementation projects. ERP is often the first project of this size, complexity and magnitude that an organization has ever taken on. Up to this point, manufacturing companies may have completed other large capital projects, but those tend to be fairly isolated to a

single department. In contrast, ERP implementations have a widespread, crossfunctional impact that exacerbates project management issues.

This is exactly why we encourage manufacturing and distribution leaders to proactively assess project management maturity early in the ERP planning process. The complex nature of ERP implementations means your teams are often stretched thin during deployment. But the project strain doesn't end after you go live. You can face even more hurdles in the critical 3-6-month period following deployment.

Here are some common struggles we see after an ERP implementation – but these equally apply to almost any transformational change project:

- Resource constraints to tackle phase two items: The talent that guided your ERP deployment gets pulled back into daily operations. Few can dedicate time to optimization for you.
- Ongoing triage and firefighting: Daily disruptions make it hard for you to step back and optimize new ERP features. Your teams get stuck in reactive mode.
- Knowledge gaps around the new ERP within your ranks: Shortcuts were taken during end-user training during the go-live crunch. Your existing teams have limited ability to leverage new capabilities.
- Lack of clarity around your post-go-live priorities: With competing demands, what should your teams focus on first? Lack of planning creates confusion.
- Mission creep with additional requests: New questions and potential projects flood in from your business teams. But without governance, your teams struggle to balance ERP stabilization with new demands.

By putting the right project management structures in place during and after a large project like ERP implementation, you can avoid these pitfalls. A dedicated team can drive ongoing adoption beyond the go-live for your organization and ensure that ROI targets for the large ERP investment can be met sooner rather than later.

## Project Management Roles: Selecting Your Cast with Care

As you're creating the project management structure, you also need to think about project management *roles*. You may face problems if you're asking people to take on project leadership roles they are not equipped for.

By trying to turn subject matter experts or operations leads into project managers without the proper capabilities or capacity, you set them up for frustration and failure. It can also end up costing your company a lot more and delay getting strategic initiatives over the finish line.

By developing intentional project management structures and capacity, you ensure roles match the capabilities needed to drive success. This lifts the burden away from individual contributors who are in over their heads, while also resolving systemic issues.

## What Is a PMO, and How Can It Help?

So, what's the answer to these common project management problems in manufacturing and distribution companies? The answer might surprise you, because it's rarely discussed in discussed in emerging and mid-sized manufacturing circles ...

It's a project management organization (PMO).

A PMO is a team that provides centralized oversight to coordinate and align projects, resources and standards across an organization.

This coordinating group has a broad mission to deliver clarity, oversight and effectiveness across your strategic initiatives. A PMO can (and should) fully embody your culture, business objectives and operating model.

At a high level, the key responsibilities of the PMO include:

- Defining and upholding expectations for how projects and resources are managed.
- Curating documentation, measurements and historical insights to ensure consistency.
- Driving on-time, in-budget delivery of your most critical initiatives.

Structurally, a PMO usually consists of a director overseeing one or more project managers. It also incorporates business analysts who handle translation between IT and key user groups to keep development aligned with business objectives. Then functional subject matter experts can be pulled in to support specific initiatives as needed and on a finite basis, knowing they can return to their day jobs when the project is complete.

## How Syte's PMO Approach Is Different

When you hear the term "PMO," do you envision unnecessary bureaucracy and rigid rules that feel out of step with your culture? If so, you're not alone – that's a common reaction from manufacturing companies.

Syte Consulting Group's approach to building a PMO is fundamentally different.

We emphasize flexibility rather than a one-size-fits-all template. We take the time to understand your unique needs and build a structure tailored to your business.

With our "crawl, walk, run" philosophy, we help develop the right foundation for managing critical initiatives and fueling growth at a pace that serves you best.

This includes matching roles with the right talent, mentoring emerging project leaders and strategically leveraging outside experts. The goal is driving efficiency, effectiveness and cost-savings through a more intentional look at capabilities and capacity — not creating bureaucracy for its own sake.

With Syte guiding your PMO setup and evolution, you gain a partner that truly understands the needs of manufacturers. We have configurable frameworks that help you scale and optimize operations through disciplined project delivery that is tailored to how you work.

Project Management Models Designed for Manufacturers and Distributors

A PMO provides the systems and talent needed for executing complex initiatives for manufacturing companies – and a PMO can absolutely use a flexible, customized approach that allows you to optimize operations without compromising culture.

If concerns around staffing constraints, mismatched roles or lack of project management standards resonate with you, the time is now to explore solutions. With targeted PMO implementation services, Syte Consulting Group partners with you long-term to alleviate growing pains. We provide objective insights around resource gaps and have a network of project talent to propel your specific growth journey.

Reach out to start a conversation around assessing current project management practices and structuring roles for scalability. Our team brings an approach shaped by decades of lessons learned across manufacturing and distribution implementations. Discover what intentional support looks like when it's purposebuilt for businesses like yours.

>> <u>Download this report as a PDF to share with your team!</u>

## I Am Finding It Difficult to Follow My Own Guidelines

By Ed Maier, Former Andersen Partner

The title on this piece has been bugging me for a while. In the fifteen years that I have been privileged to write to you in this newsletter, I have always believed that I should model any behaviors that I encourage you to consider. Lately, that has become challenging for me. To motivate me to improve my own behavior, I am writing you again about one of the fundamental behaviors all of us learned in our time with Arthur Andersen. I am referring to our founder's "favorite saying" - Think straight. Talk straight.

I wrote to you a few months back about two volunteer organizations in which I participate. They are both devoted to the concept of reducing polarization in our society. In one, the focus is on matters of race. In the other, the focus is on the political divide - conservative vs. progressive, or simply red vs. blue. In working with both organizations, I have been learning and observing similar guidelines which I can relate back to the TSTS concept. But as I reflect on some of my own recent conversations, I do not always follow them. I have allowed polarizing topics to get the best of my emotions. Bear with me as I use this newsletter piece to remind us of these guidelines. Hopefully, my self-catharsis in writing this piece may help you also.

## Think Straight--

Gather and understand the facts. When faced with this, or any other problem, I must assemble the relevant facts to help my thinking process and to make my decisions. I must verify facts as much as possible. I need to frame my decisions based on the facts as I understand them. When I gather data, I should use reliable sources.

Understand the context. I need to recognize that the same facts may have different meanings in a different context. Facts and information that I obtain can be "spun" to support their source. I should do a better job to verify the sources of information. In some cases, I should compare my source to other reliable sources. Context counts and I must make sure I understand the context in which data is presented before blindly relying on it.

Avoid noise and fluff. There is always a great deal of "noise" in our system, even more so today. I must insulate myself against the noise while seeking out the factual pieces that the noise surrounds. I must filter through it; throw out the hyperbole. One of the ways I try to do this is to only rely on sources that I trust for information I receive. I need to screen new messages I receive against those sources to attempt to establish their veracity.

**Keep it simple.** I deeply believe in this principle because even the most complex facts can be broken down into simpler parts. I need to work harder at doing so. I know this will help me clear the air and focus on what is relevant. I have pretty good analytical and data-gathering skills. I need to make sure that I use them to reduce complexities.

Listen straight - Again, I will refer you to Stephen Covey. In his book "The Seven Habits of Highly Effective People", Habit #5 was "Seek first to understand, then to be understood". I cannot expect to be understood if at first, I do not understand the other party. My primary role as a good listener is to understand and respect the other party's point of view. I must understand the assumptions that they have made in drawing their conclusions about their facts.

## Talk Straight—

Understand Your Audience. Before I begin speaking, I need to understand the person(s) to whom I am speaking. I need to inquire of them what their points of view or positions are. I need to ask them to present and explain their facts. I cannot assume their sources, though they may be different than mine, are impeachable. I cannot make assumptions about their beliefs based upon their lifestyle, their job, their political leanings, or their affiliations.

**Tell it like it is.** I must carefully and non-argumentatively present my understanding of the facts that support my conclusions. I must explain the context in which I understand the problem, outline or summarize the facts I have gathered, share the sources of my facts and present my conclusions succinctly and without expressing frustration. I must not sugarcoat my facts or my point of view. I must not try to "spin" my conclusions. I must be honest, even if my message might cause pain.

**Keep it simple.** I must be brief and to the point. I should carefully add facts and context but not attempt to overwhelm the other. If someone asks me the time of day, I should just tell them—not build them a clock.

Ask if you are understood. I should ask my listener if they understand what I have said. I should clarify my message with a few questions to validate that they do. Two people can look at the same sky, yet one sees it as partly sunny while the other sees it as partly cloudy. In today's environment, two people can look at the same set of economic statistics or climate change trends and draw significantly different conclusions. In the proper circumstances, I should remember it can be helpful to ask my listener to restate my message in their own words. I can also use this technique in reverse to show them that I understand their point of view. I must remember to do my best to ensure that my listener understands my communication—not agrees with it; just understands it.

Consider the other's perspective. It is easy to say this step, but it can be difficult to remove my own thoughts and beliefs while trying to understand another's perspective. But if I am going to live up to my principles, I must think about the value of their point of view and how it can affect mine. To truly "Talk Straight" I must demonstrate that I consider them. If, in the moment, they present me with data that can impact or alter my own conclusion, I must acknowledge that.

Be courteous, be respectful, be thankful. I must be thoughtful and polite as I listen to points of view of others. I must respect their viewpoint. One of the partners I worked for early in my career was masterful at this. I worked with him on several occasions. Looking back on some of the mistakes I made, I often wonder how he did not lose patience with me. But he always treated me with respect; he listened to my rather un-intelligent questions; he carefully and thoughtfully explained things to me; he often analogized complex business issues to other concepts that were easier to understand. And he regularly thanked me for my input, even when he did not accept it.

Manage your emotions. In any conversation, no matter how passionate it is, I must control my emotions. And I must not try to control the emotions of others. Every time I want to jump in and interrupt or "correct" them, I need to think before I speak. Stephen Covey said that one should not just immediately react when things happen. I must slow down my thinking. I must plan my actions or reactions. Only then should I act.

I have one final thought for you. Take care of yourself. You cannot fulfill your responsibilities to others without fulfilling your responsibilities to yourself. The pressures and stresses you feel today quite possibly are unlike anything you have felt in the past. Most of the impact of the pandemic is now behind us. But the increasing polarization in our society challenges all of us in different ways. I must regularly remind myself that first and foremost I should take care of my own physical and mental well-being. I cannot take "sound mind" and good health for granted. I need to work at it. Whatever steps you take to help you take care of yourself -be it exercise, meditation, prayer or just some "alone time"—please do so regularly.

My best to each of you. Stay well. Stay healthy. Stay safe.

As always, I am interested in your thoughts, and would love to hear some of them. Don't hesitate to write me at <a href="mailto:edmail.com">edmailcom</a>. And, if you enjoy what I write, there is more of it at "Think Straight. Talk Straight." available on <a href="https://www.Amazon.com">www.Amazon.com</a>.

## How to Be Known for Handling Feedback Well

By <u>Jennifer Eggers</u>, Andersen Alumnus and *Founder & President of LeaderShift Insights®* 

Few things build gravitas faster than keeping your cool and doing the right thing in a moment of visible pressure. And there are few situations with more visible pressure than when a leader receives feedback in front of others. This situation gets elevated quickly when "others" includes the board, or senior leadership team.

Very few people are known for handling this well and those who do are well respected for it. If you want to build gravitas fast, have a plan in your back pocket and be ready with an approach that demonstrates poise, confidence, strategic vulnerability, and openness to hearing a different point of view, even if you absolutely disagree with it. Here are a few ideas to keep in mind as you build your plan:

## Leader Shift® 7 Step Feedback Plan:

- 1. When receiving feedback, freeze your facial expression and do not react other than to nod in understanding. Your job is to listen with curiosity and seek to understand the feedback. Ask clarifying questions, if necessary, but DO NOT REACT positively or negatively.
- 2. Resist any urges to defend, justify or explain. Just take it in and understand what it is. Breathe. Deeply if you have to. Breathing gets oxygen to the brain that will help you think clearly even if you detest what you are hearing.
- 3. Thank the person for the feedback and tell them you want to think about it or look into it and that you will get back to them.
- 4. Resist any temptation to defend your team, the process or to justify or explain why any aspect of the feedback is the way it is.
- 5. Ask any questions to be sure you understand what the feedback is and how the provider got to their point of view.
- 6. End the conversation by reiterating that you will investigate it.
- 7. If appropriate, make a commitment to follow up after the meeting to get more information from the person providing the feedback.

## That's it. Stop talking.

THEN take the time you need when you have a cool head to formulate a response. This next part is the second most important: Call a few days later and set up time with the person to discuss.

You are actually going to follow up.

This allows you to deliver on your commitment privately and under less pressure without the audience. This is your opportunity to educate them on your well thought out and non-defensive reaction. Thank them for the feedback and tell them what you will do about it. Explain why some things are the way they are. Ask follow-up questions and brainstorm solutions. In all cases, you will have shifted a potentially damaging high pressure situation to a productive discussion where the other person feels heard and appreciated even if you don't implement the feedback.

Unless you are in an after-action review, there is no possible good that can come of discussing negative feedback in front of others. It is too easy to get defensive and cause others in the room to take sides. The moment you get defensive, you immediately LOSE gravitas. The irony here is that if you play this situation well, you stand to really impress others with your reaction, no matter how much the feedback stings. People who remain calm under pressure, react appropriately to feedback, and deliver on their commitments nearly always have gravitas.

This approach also works well in any situation where you are likely to react emotionally. Familiarize yourself with the physiological reactions you feel when your buttons are pushed. Do you get cold hands? Red face? Rapid heartbeat? Sweaty? Often we feel things physically before we are conscious of them emotionally. If you learn to recognize these symptoms and pause when you feel them, you will have some lead time to think before you react.

Build a "script" for what to do when you know your emotions have the best of you. Remember, behavior is a derailer, not emotion. If you can stop the behavior, you can get control of the situation. Have a plan. Take a quiet deep breath to get oxygen to your brain, take a drink, go to the bathroom, take notes...whatever will buy you time to think before you react. You might say, "that's interesting, I'd like to think about it" instead of giving an answer. Find something that works for you and practice it so you can do it without thinking.

Jennifer Eggers is a C-Level advisor and President of LeaderShift Insights, Inc. She works with leaders and organizations going through disruption to improve their capacity to adapt. This is an excerpt from Jennifer's new book, coming this summer from Best Seller Publishing. The working title is "Mastering The C-Suite Mindset: A playbook for transitioning into the C-Suite". The book is based on 30 years of patterns observed while working with and coaching C-Suite leaders across 16 countries and over 25% of the Fortune 500.

## A Crash Course In Al Readiness

By Larry English, Andersen Alumnus, CEO and cofounder of Centric Consulting and author of Office Optional: How to Build a Connected Culture with Virtual Teams. To learn more about him, visit <a href="https://www.LarryEnglish.net">www.LarryEnglish.net</a>

Al is a transformative technology—if organizations can implement it strategically. It's up to leaders to understand Al, be able to analyze and act upon the insights it provides and boldly imagine a new future.

Although successfully implementing AI in business requires a new way of thinking, at the end of the day, it's a tool like any other. Below, I pulled some of my top tips for AI readiness from my Forbes column.

## How to Implement AI in Business

First, some reassurance. If your company struggles with how to implement AI, you're in good company. One <u>survey</u> found that 94% of leaders have "tech anxiety" following the emergence of AI. Leaders are worried about the rapid pace of technological change and what it means for their business models and workflows. In other words, will we ever be able to catch up?

Yes—if you can fast-track your organization's AI readiness. Here's how:

- **1. Focus on the fundamentals.** Understanding your core capabilities and differentiators will guide you in:
  - Knowing where to invest to enable a competitive advantage.
  - Developing a strategic roadmap grounded in a realistic vision for your organization's future.
- 2. If you're not in the cloud, now's the time. All requires vast storage and compute abilities. Having your data in a cloud is table stakes for Al. More on data below.
- **3. Get Al literate.** To begin envisioning how Al can transform your organization, you need an Al literacy crash course. Leaders and employees alike need to understand the basics of Al and its capabilities. It's a powerful tool, but it's not a silver bullet. And it definitely extends far beyond ChatGPT.
- **4. Reenvision the future.** All has the potential to change everything. How can the technology change how you do work? Your products and services? How you deliver products and services?
- **5. Embrace the experimentation phase.** All has big disruptive potential. We're all still figuring out how to implement All in business, and likely will be for some time.

For more on fast-tracking AI readiness: <u>Caught Off Guard By AI? Here's How Your Company Can Catch Up.</u> (forbes.com)

## Data Governance for AI: Think Big, Start Small

The big hurdle for companies getting on board AI is data. Feed AI systems bad data, you'll get bad results. And most companies do not have their data in order. Data governance isn't nearly as exciting or flashy as AI, but it does form the foundation of any successful AI project.

Fixing your organization's data and creating a data governance for AI strategy may be a huge undertaking. But you don't have to get it all in order before embarking on an AI implementation journey. Here's how to take an incremental approach to data governance for AI that lets you get started on AI now while creating a solid strategy for data moving forward:

- **1. Pick a use case.** What's a major business mandate AI can help with? Where do you have proprietary or third-party data that can be mined for AI? What's the state of the data you'll be working with?
- 2. Clean up the data required for that use case. Your data doesn't have to be perfect to start creating value from AI, but you do need to understand its flaws before you leverage it.
- **3.** Create your data governance for Al strategy. While you're exploring and preparing your initial Al use case, begin creating an overarching framework and strategy for data governance for Al. Moving forward, how will you collect, maintain and secure data throughout your entire organization?

For more on data governance for AI: <u>Fix Your Data, Win At AI. Here's How To</u> Get Started. (forbes.com)

## Minimize Al's Security Risks With Al Governance

Another major component to AI implementation is making sure you're appreciating and preparing for the risks involved with the technology. To prepare for the security implications of AI, you need an AI governance strategy that includes:

- **1. Company-wide security awareness.** Employees need to be aware of the security risks associated with AI and its data. Comprehensive and ongoing training must cover policies, guidelines and best practices around AI use.
- 2. Clear Al guardrails. Your Al governance plan should promote the responsible and ethical use of Al tools. Designate a cross-functional Al governance committee that can define Al guidelines and best practices, establish a decision-making process for using Al and auditing Al tool usage.
- 3. Regular Al risk assessments. Frequent penetration testing is a must. Leaders must keep close tabs on tech investments and build in tools that screen and flag Al-generated content in communication to prevent phishing and other scams.

For more on security and AI and AI governance: <u>AI And Security: Is Your Organization Ready? (forbes.com)</u>

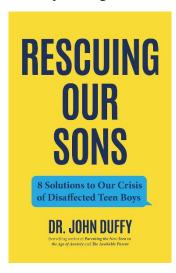
In conclusion, AI is a transformative technology. Leaders that figure out how to implement AI in business and keep pace with a rapidly evolving world will be ahead of the curve.

# New Book Release: Rescuing Our Sons: 8 Solutions to Our Crisis of Disaffected Teen Boys

By: Dr. John Duffy, Arthur Andersen Alumnus, Author and Clinical Psychologist

How to help our sons grow into happy, successful, capable adults. Recent decades have shown that boys are simply not thriving the way they should be. In Rescuing Our Sons, Dr. Duffy has developed 8 practical parenting steps to improve your understanding of your teenager, equip him with life skills to improve his present and his future, and bring your family together.

Become the effective, confident parent your teen needs. Raising responsible, confident boys is difficult, especially through the teen years. Dr. Duffy is dedicated to helping you encourage your son's growth with positive parenting tips.



## Inside, you'll find:

- Practical and proven parenting strategies for dealing with the common issues that teen boys face, including gaming addictions, pornography, vaping, and drug use.
- New perspectives and insights on your son's teenage brain and behavior that will help you develop a more meaningful relationship with him.
- Methods for effectively raising a motivated young man who can overcome depression, anxiety, and risky behaviors.

Readers of books on parenting teens, such as The Teenage Brain, How to Raise an Adult, He's Not Lazy, or Parenting the New Teen in the Age of Anxiety, will want to pick up a copy of Dr. Duffy's Rescuing Our Sons available on Amazon.

About the Author: After graduating from Notre Dame in 1986, Dr. John Duffy came to work in Arthur Andersen's Chicago office. After spending a few years as an auditor, he transferred into our financial consulting group. In 1992, Dr. Duffy left the firm to pursue his doctorate in clinical psychology at the Chicago School of Professional Psychology. For the last 25 years, he has been in private practice, working with teens and families. In that time, he has appeared on countless national and local media outlets, been a contributor to CNN Wellness, and has written three best-selling books. His latest book, Rescuing Our Sons, focuses on the difficulties our teenage boys and young men are suffering these days that many parents may not be aware of. You can contact Dr. Duff via his website, message him on Facebook or follow him on either Twitter (X) or Instagram: @drjohnduffy.

## Balancing Tech and the Human Touch: Using AI in Executive Recruiting

By <u>J. James O'Malley</u>, Andersen Alumnus, former National Director of Experience Recruiting and Jennet Douglas

Generative Artificial Intelligence (gen AI) could contribute up to \$15.7 trillion to the global economy in 2030 according to a recent PwC study. This emerging technology is ready to transform the world (one can argue it already has!), and the possible implications for Executive Recruiting teams are exciting. You and your colleagues are likely already considering which systems and processes can benefit most from the integra on of AI, allowing for more effective use of your name, and ultimately enhancing the customer and candidate experience.

## Connection is key.

Connection is a cornerstone of our industry. It builds rapport and trust, forming a bridge between our clients, customers, and candidates. As we unleash the power of AI to streamline workflow and increase efficiency, how do we ensure that we can work smarter and faster without forsaking our most valued assets: connection and trust? How do we strike a balance and maintain the essential human elements of the recruitment process that create the true value of our customized experience?

In finding the balance between humans and tech, it's important to note that all Al applications require *some* amount of human oversight. They are not perfect tools - they simply synthesize large amounts of publicly available data, and they do make mistakes. Therefore, we must review and confirm the work Al does for us. At the same time, we are also responsible for understanding and limiting programs that may remove crucial opportunities for connection and human insight - programs like chatbots/virtual assistants and video interview analysis which are some of the tools trending in talent acquisition. While they can make the recruitment process a little easier, they ignore human elements that Al cannot replace, elements that require emotional intelligence, creativity, and higher order

thinking. While AI tools can (and should!) augment the work we do, only humans have the capacity for the nuanced decision-making involved in handling complex situations like assessing candidates, tailoring search strategies, understanding organizational culture, and providing customized consultation.

## Gen Al is here to stay.

Search firms already take advantage of gen Al for a variety of tasks, most often third-party research (LinkedIn Recruiter), candidate assessment (Predictive Index), email blasting (Yesware), document storage (Dropbox), and communication (Zoom). Cluen released a paper last fall with data showing that Executive Search firms utilize ChatGPT more consistently than any other Al tool. Its prompt engineering can quickly provide information that could otherwise take days, or even weeks, to collect, analyze, and summarize manually. Although, a caveat exists: to illicit a thorough and accurate response, you need a strong enough prompt (think Boolean search). Developing this skill facilitates access to large amounts of data that can be used for crucial, and traditionally time-consuming, tasks such as candidate screening and sourcing, interview prep, talent pipelining, and market research.

Gen AI will change everyone's job functions and responsibilities. It has the potential to wipe out existing roles while creating new ones. As you plan for further implementation of these applications, we advise you to identify your goal(s) and make a few key considerations. First, remember that the technology is a tool that does not replace human abilities, it only amplifies them. Discern which AI programs could remove important interactions with clients and candidates so you can maintain valuable touchpoints. Avoid negative recruiter sentiment by ensuring they have ultimate control of how the tools are used and do not feel like the tools control them. Finally, be aware of the legal and ethical implications of gen AI. It may be surprising to learn that AI programs can inadvertently perpetuate bias. This concern - along with data privacy, reliability, and job displacement - can raise questions about how to implement them effectively.

## How to get started.

What are your goals? Organizations must prioritize the applications of AI that can have the greatest positive impact on their work without losing touchpoints with their contacts. This will look different from one firm to the next. Some of the tools gaining popularity in the human resources industry assist with candidate sourcing and matching, resume parsing, and predictive analytics. IBM has even developed a "predictive attrition program" that, with 95% accuracy, can identify employees who may be a flight risk and then provide tools for management to reengage them.

Al tools can also be programmed to promote diversity and inclusion, provide market trends and insights, and identify skills gaps within an organization to pinpoint the best candidates for leadership roles. T-Mobile has established its entire culture around diversity, so attracting a variety of candidates is key to maintaining their business model. They began using Tex o to optimize recruiting

language for inclusivity and engage more diverse candidates in less me, and the results were obvious. Their job postings now attract 17% more women candidates, and they fill roles an average of 5 days faster.

Executive Search is a people business, so put people first as you incorporate Al into your process. This will lead to strong relationships and lasting placements while you harness a powerful tool for productivity. On their own, the speed and accuracy of Al will not lead to greater success in our industry. The technology brings efficiency and data-driven insights, but the human touch remains invaluable in understanding the subtle es of human behavior, managing relationships, and providing a powerful, personalized experience for each of our clients, customers, and candidates.

"A computer can never be accountable; therefore, a computer should never be able to make a management decision."
- IBM. 1979

## About the Authors:

J. James O'Malley is a Managing Director and Practice Leader for Felix's Executive Search business. For 30+ years, Jim has developed talent acquisition solutions to ensure that leadership talent aligns with changing business needs. In addition to his work with Private Equity and their portfolio clients across all industries, Jim has served a wide range of specialty firms including Accounting, Management, Architectural, Engineering, and Law consultancies. He also has vast experience with other practices including IT, Healthcare, Operations, and Supply Chain, and he partners with large Commercial, Consumer and Private Banks to help with their hiring needs.

Jennet Douglas is a Senior Client Services Manager for Felix. Jennet brings over a decade of experience working in education and nonprofit management to serve our clients. She values quality relationships and strong systems and believes they are the foundation of organizational success.

## The Unexpected Leader

By Todd Dewett, Andersen Alumnus, author and speaker

Not all leaders wanted to be leaders. An increasing number of them are unexpected leaders. They were not seeking a promotion. They did not expect it. They often don't even want it. However, they are being asked to step up.

This happens for many reasons. Sometimes it's due to structural change in the organization, such as a shift to a matrix organization with many new supervisors. Or it could happen due to resource problems (e.g., a key person leaves, retires, or needs extended time). Sometimes, a supervisor is assigned a new temporary project role and needs someone to watch over the team. Finally, maybe a new opportunity exists, and they think you're the best person for the job!

Welcome to leadership. Now you're at the front end of a new learning curve because many of the skills that got you here are not the skills that will make you a good leader. Here are a few quick ideas that will help you survive and thrive in your first few months as an unexpected leader.

First, admit mistakes and don't act like you know everything. Whether you experience ambiguity about tasks or people, don't hesitate to admit that you don't know something. People don't like know-it-alls and can sense bull easily. When you admit what you don't know, you build bonds by showing your humanity and validating humanity in others. And when you make a mistake - own that too, immediately if possible. Explain yourself, seek assistance, and thank them for their understanding.

Next, listen more than you talk. You learn faster the more you listen. The team knows things you don't. Let them help you - don't talk more than necessary to inquire, validate, and praise. Listen intently so you can start to understand both their knowledge and their motivation. Now you're learning. Plus, when they see listening as one of your top skills, they will feel more like your peer and are more likely to respect your decisions.

Third, it's time to draw a few soft lines. They need to know you're a good listener, yes, but they also need to know you're in charge. Be kind and positive but be sure to set a few new boundaries. Think about things you will not talk about given your new role. Think about interactions you must reduce, change, or avoid (e.g., certain types of social outings). It's okay to be a warm people person while also knowing when to clarify your expectations and provide needed feedback.

Finally, don't reinvent the wheel! You're going to scratch your head a few times. That's normal. Others have likely seen these issues too, so it's time to leverage them. Go find people who know more than you do. That might include the person who had the role before you, your new supervisor, or a coach or mentor. There is no need to waste time resolving old problems.

As markets experience turmoil, technologies continue to advance rapidly, and the generational shift at work accelerates - the number of unexpected leaders will be on the rise for years to come. Yes, it could even happen to you. Don't be alarmed, success in this situation is simply about building new skills. You've got this. Start by using the ideas we just covered and you're very likely to become comfortable and productive quickly.

Dr. Todd Dewett is one of the world's most watched leadership personalities: a thought leader, an authenticity expert, best-selling author, top global instructor at LinkedIn Learning, a TEDx speaker, and an Inc. Magazine Top 100 leadership speaker. He has been quoted in the New York Times, TIME, Businessweek,

Forbes, and many other outlets. After beginning his career with Andersen Consulting and Ernst & Young he completed his PhD in Organizational Behavior at Texas A&M University and enjoyed a career as an award-winning professor. Todd has delivered over 1,000 speeches to audiences at Microsoft, ExxonMobil, Pepsi, Boeing, General Electric, IBM, Kraft Heinz, Caterpillar, and hundreds more. His educational library at LinkedIn Learning has been enjoyed by over 30,000,000 professionals in more than one hundred countries in eight languages. Visit his home online at www.drdewett.com or connect with Todd on LinkedIn. He can be reached at todd@drdewett.com

# Embracing the Culture Paradox: Bridging the Gap between Employee Values, Netflix Is Rethinking Employee Freedom: Inward Strategic Consulting Insights

By <u>Allan Steinmetz</u>, Former Worldwide Director of Marketing & Communications and Associate Partner at Andersen Consulting and now CEO of Inward Strategic Consulting

In the ever-evolving landscape of corporate culture, Netflix has always stood out as a leader in innovation and disruption. For years, the streaming giant has been synonymous with its groundbreaking approach to employee freedom and responsibility. However, recent discussions within the company hint at a seismic shift in its cultural ethos, as reported in a recent Wall Street Journal article by Jessica Toonkel on March 16, 2024.

At Inward's Strategic Consulting, we view these potential changes at Netflix through a lens of organizational dynamics, stakeholder alignment, and cultural evolution. Change happens as an organization grows. As companies grasp and face new challenges, it's imperative to reassess and adapt cultural norms to ensure continued success and alignment with strategic objectives.



Netflix's long-standing mantra of "freedom and responsibility" has been foundational to its rapid growth and innovation. Trusting employees to make autonomous decisions has empowered individuals to act swiftly and decisively, driving the company's success in a dynamic industry.

Yet, as Netflix expands its global footprint and navigates complex business changes and landscapes reorientation, the need for cultural recalibration becomes apparent. The proposed removal of the "freedom and responsibility" section from the corporate culture memo signals a shift towards a more nuanced approach to employee empowerment.

Instead of solely focusing on freedom, the company aims to instill a culture of ownership and accountability. This strategic pivot reflects Netflix's maturation as an organization, acknowledging the importance of balance between autonomy and responsibility. Ownership mindsets make employees perform their jobs differently with greater passion and drive. Their responsibilities are not just tasks. Examples from other companies offer valuable insights into the potential consequences of such cultural shifts. Google, once known for its unconventional workplace culture, has undergone significant transformation in recent years. As the tech giant faced regulatory scrutiny and internal challenges, it reevaluated its approach to employee autonomy, emphasizing accountability and ethical decision-making.

Similarly, Amazon, renowned for its demanding work culture, has faced criticism and scrutiny over its treatment of employees. In response, the company has implemented changes to prioritize employee well-being and foster a more inclusive and supportive environment.

Netflix's proposed emphasis on creativity and creative freedom aligns with broader industry trends. In today's competitive landscape, companies must nurture innovation and empower employees to think outside the box. By fostering a culture that encourages creativity and ownership, Netflix positions itself to continue leading the way in content creation and storytelling. However, cultural changes are not without challenges. Netflix executives have acknowledged concerns raised by employees regarding the proposed revisions. Balancing the need for structure with the desire for autonomy requires careful deliberation and stakeholder engagement.

As co-founder Reed Hastings humorously remarked, culture is not static but rather a living organism that requires constant review and adaptation. By soliciting feedback and remaining open to change, Netflix demonstrates its commitment to fostering a culture that aligns with its core values and strategic objectives.

Cultural transformation requires more than just rewriting memos and implementing new policies. It necessitates a comprehensive approach that engages employees at all levels, fosters open dialogue, and promotes a shared

sense of purpose. Netflix's commitment to soliciting feedback from its workforce underscores its dedication to inclusivity and transparency, key pillars of effective organizational culture.

Moreover, Netflix's willingness to revisit its cultural norms in light of employee feedback exemplifies a culture of continuous improvement and adaptability. As the company evolves, it must remain agile and responsive to changing internal and external dynamics, ensuring that its cultural values remain relevant and impactful.

Inward's Strategic Consulting has observed similar cultural shifts in other organizations undergoing periods of transformation. Companies such as Apple and Microsoft have undergone profound cultural overhauls under new leadership, revitalizing their respective brands and driving renewed innovation.

Apple's transition from a product-centric to a customer-centric culture under CEO Tim Cook has propelled the company to new heights of customer satisfaction and loyalty. By prioritizing user experience and inclusivity, Apple has cemented its position as a leader in the technology industry.

Likewise, Microsoft's cultural transformation under CEO Satya Nadella has been characterized by a shift towards empathy, collaboration, and inclusion. By fostering a growth mindset and embracing diversity, Microsoft has reinvigorated its workforce and unleashed a wave of creativity and innovation.

In conclusion, Netflix's rethinking of employee freedom represents a strategic recalibration aimed at fostering a culture of ownership, accountability, and creativity. From an Inward's Strategic Consulting perspective, we commend Netflix for its proactive approach to cultural evolution and its commitment to driving sustainable growth and innovation. By embracing a culture of ownership, accountability, and creativity, Netflix positions itself for continued success in an increasingly competitive market.

Through a strategic consulting lens, we recognize the importance of cultural alignment with organizational goals and applaud Netflix's willingness to evolve in pursuit of excellence. As the streaming giant navigates this cultural transition, we remain optimistic about its future trajectory and its ability to redefine the entertainment landscape.

About Inward: Inward Strategic Consulting is a 26-year-old management/creative consulting firm that helps clients achieve high performance by developing comprehensive business strategies and cultures aligned with their goals, processes, and resources. They specialize in internal/external branding strategies, change management, brand purpose, and market research. They offer proprietary methodologies such as Visioneering, Inward Marketing, Dialogue Marketing, Best Practice and Benchmarking, and Qualitative and Quantitative Market Research. They have worked with Fortune 100 companies including Walmart, McDonald's, Aetna, City of Hope, and many others.

# Heightened cybersecurity risks posed by North Korean IT workers impersonating non-DPRK Nationals

By <u>Kristofer Swanson</u> and <u>Patricia Peláez</u>, both Andersen Alumni and now working for Charles River Associates Forensic Services Practice as Vice President & Practice Leader and Principal, respectively

Based on our experience in recent client matters, we have seen an escalating threat posed by the Democratic People's Republic of Korea (DPRK) information technology (IT) workers engaging in sophisticated schemes to evade US and UN sanctions, steal intellectual property from US companies, and/or inject ransomware into company IT environments, in support of enhancing North Korea's illicit weapons program.



## What Information Should You Know?

In general, the scheme involves the use of deceptive tactics, including stolen identities and remote access technology tools, to secure IT employee or contractor positions within US-based employers. The allure of high pay for these roles, coupled with a comparatively low risk of detection, makes this scheme particularly enticing for DPRK operatives.

The US Department of Justice announced in a recent court-approved seizure action:1

"As alleged in court documents, the Government of the Democratic People's Republic of Korea (DPRK) dispatched thousands of skilled IT workers to live abroad, primarily in China and Russia, with the aim of deceiving U.S. and other businesses worldwide into hiring them as freelance IT workers, in order to generate revenue for its weapons of mass destruction (WMD) programs. Through this scheme, which involves the use of pseudonymous email, social media, payment platform and online job site accounts, as well as false websites, proxy computers located in the United States and elsewhere, and witting and unwitting third parties, the IT workers generated millions of dollars a year on behalf of designated entities, such as the North Korean Ministry of Defense and others, directly involved in the DPRK's UN-prohibited WMD programs."

### What Can You Do With This Information?

We recommend that companies mitigate this risk by using a risk-based approach to:

- conduct enhanced due diligence on employee/ contractor candidates.
- strengthen ongoing monitoring capabilities of employees/contractors.
- bolster defenses against the inappropriate exfiltration of valuable information.
- reduce the risk of remote access tools being launched in ways that could circumvent the typical requirement for admin privileges.
- prepare to better respond to ransomware and other cyber incident response situations.

We invite you to reach out to continue the conversation on how to most effectively detect, prevent, and correct this or other types of fraud, cybercrime, misconduct, and non-compliance. Kris and Patricia can be reached via email at <a href="mailto:kswanson@crai.com">kswanson@crai.com</a> and <a href="mailto:ppelaez@crai.com">ppelaez@crai.com</a>, respectively.

1 https://www.justice.gov/opa/pr/justice-department-announces-court-authorized-action-disrupt-illicit-revenue-generation

About Charles River Associates (CRA): Operating from ten countries around the world, CRA's clients over the past two years included 97% of the AmLaw 100 law firms, and 81% of the Fortune 100 companies.

Our Forensic Services Practice has been recognized by The National Law Journal as being one of the top three Forensic Accounting Providers in the country; by Global Investigations Review as one of the leading investigative consultancies from around the world for handling sophisticated cross-border, government-driven and internal investigations; and by Chambers in recognition of our deep litigation support and crisis & risk management competencies. The Practice, including our state-of-the art digital forensics and our eDiscovery & cyber incident response labs, has been certified under International Organization for Standardization (ISO) 27001:2013 requirements as part of our industry-leading commitment to our clients and their information security. CRA maintains private investigator licenses in multiple jurisdictions, as listed on our website: (www.crai.com).

## The Art of Asking

By <u>John Blumberg</u>, Andersen Alumnus and author of Return On Integrity (<u>www.BlumbergROI.com</u>)

In his book, *Outliers: The Story of Success*, Malcolm Gladwell introduces the concept of the 10,000-Hour Rule. In a world that seems to have a plethora of instant expertise, it is quite a refreshing bar he establishes in one earning their way to the level of an expert. It reminds me of my friend Maryann sharing related wisdom from her grandfather:

## Nothing great happens quickly.

In so many ways, experts aren't the ones boasting instant answers as if every problem has a solution ... but rather they are the ones asking really difficult questions being fueled by deep and diverse experiences that can only come from the investment of a lot of hours. No doubt, when someone has invested 10,000 hours into anything, there is the opportunity to run into a lot of questions - both externally and internally. It may be fair to say that one can't live on the surface of anything over the course of 10,000 hours. At some point, often unintended, the bottom falls out and one goes plummeting into a depth that only beckons them to fall ever deeper into their experience.

The ego seems to love an answer - especially when it's our own! On the other hand, the heart and soul long for an adventure that never reveals itself in a moment's notice. It is an adventure that calls us to trust the experience, moment-to-moment, over a very long period. While Malcolm's 10,000-Hour Rule isn't a new concept (consider the old saying: It took him 20 years to become an overnight success!) it certainly quantifies the investment in a stark and bold fashion.

Yet, with a market obsessed with speed while propelled by many addicted to competition, it makes for a lethal combination of serving up short term answers with little or no concern for long-term consequences - often unintended. Quick answers have a way of closing heavy doors.

## Questions have a way of re-opening them.

In my years while working in the World Headquarters of Arthur Andersen, I had a 9-block walk from our offices at 69 W. Washington to Union Station. I became quite efficient at navigating the crowds, the lights, and the cross streets to limit my time from office to boarding the train. This efficiency allowed little time to notice anything along the way other than the time left before I would miss my train.

Yet, during that same season of life, I developed a practice to, once a week, leave the office a few minutes early intentionally slowing down my stride to pay particular attention to those I saw along the way. As my eyes glanced from person-to-person - from a professional moving at my typical efficient pace, to a parent patiently pushing a stroller, to an artist delightfully sharing their gift on a random street corner, to a homeless person quietly sitting with a tin can and a sign - I repetitively wondered what I would discover if I could simply sit with that person for an entire afternoon listening to their life story while only asking them questions.

It mentally forced me to start with a blank sheet of paper.

And it never failed in allowing me to arrive to my seat on the train feeling a deeper sense of humility and a richer sense of curiosity - characteristics I intentionally wanted to deepen in my own life journey. Meaningful questions have a way of nurturing both.

It was during this same period of time, amongst our Firmwide Recruiting Team, that we were embarking on a sophisticated and significantly different form of conducting interviews. The methodology demanded your curiosity while neutralizing your assumptions. It required you to actively listen, focus and probe with simple questions. The outcome of the interview literally depended on the art of asking. The methodology wasn't about just any question - it was about the right question at the right time asked in the right way. And rarely did it fail to deliver delightful surprises along the way.

As I look back on the most meaningful conversations I have experienced in my own life, the narrative always involved a lot of questions back-and-forth. Not any question - but the right question at the right time asked in the right way. And yes, almost always, the questions were hard, authentic, and vulnerable.

Spiritual teacher and psychologist, James Finley. says that in a counseling session there often comes the right moment when he asks a question that he knows the counselee can't immediately answer. Searching for an answer in an elongated silence, the counselee can only turn inward for a response that is not easily accessible - perhaps only leading them to a deeper question.

It strikes me that in a world searching for answers, and plenty of spontaneous "experts" looking to serve-up teflon solutions, we might be best served in asking a lot more questions - really hard, difficult, uncomfortable and inconvenient questions. The quality of the results will, of course, depend on the art of the ask.

As Malcolm Gladwell so clearly expressed: one dimension of expertise is measured by the number of quality hours invested. Maybe another dimension might very well be measured by the number of meaningful questions asked. Perhaps a combination of the two would take us to a whole new level of wisdom and understanding - of the complex issues of our day and of each other. Maybe it could evolve into a masterpiece worth hanging in some future museum showcasing the history of our times. Surely, it's worth asking about!

As always, I'd love for you to share your thoughts! We could all benefit, if you would be so kind to share your thoughts email me at <a href="mailto:John@BlumbergROI.com">John@BlumbergROI.com</a>!

## Becoming an Independent Director

Shared By Michelle Fanaro, Andersen Alumnus and currently a consultant at Spencer Stuart

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Many successful executives today view serving on a corporate board of a private or public company as a professional goal. This new booklet sheds light on the roles and responsibilities of a board, the skills and qualifications in demand in the boardroom, and the steps involved in joining a U.S. corporate board. Whether you are a sitting executive interested in expanding your experience or someone who is in (or near) retirement looking to develop a board portfolio, we

## Topics include:

- Why become a corporate director?
- The roles and responsibilities of board directors

hope you will find this booklet both practical and inspiring.

- Board composition
- The director search process
- Crafting an effective resume/CV
- Determining whether you're the right fit for a particular board
- How to increase your chances of being considered

Download a copy of Spencer Stuarts 1<sup>st</sup> Edition Becoming an Independent Director

## Here Are Simple Ways to Increase the Number of People Who Check out Your LinkedIn Profile

By Wayne Breitbarth, Andersen Alumnus and CEO-Power Formula LLC (Author of "The Power Formula for LinkedIn Success: Kick-Start Your Business, Brand and Job Search')

Most people will agree that LinkedIn has established itself as one of the best marketing tools on the planet for business professionals, and part of your marketing strategy, whether marketing yourself and/or your products and services, should be to encourage marketing events or interactions with your target audience.

One of the most important marketing events on LinkedIn is profile views. When someone views your profile, it's like they walked into your store, ready to do some shopping.

So, how do you attract more shoppers to your store?

## Long-term strategy

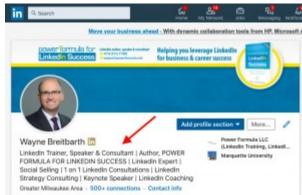
Of course, almost everyone who checks out your profile could be a potential client/customer or at least know someone who might be interested in you and what you have to offer. However, ultimately you're looking for views from people who quite likely can help you achieve your business goals.

To get on the path to long-term success, it's important to <u>connect with your target audience</u> and share great information, thereby nurturing the relationship and increasing your thought leadership status. Then, when they are ready to engage someone who has your expertise, you have earned your way onto their list—and hopefully, it's a very short list!

## Short-term strategy

In the short term, here are eight simple ways to get more of the right people viewing your profile.

1. Optimize your LinkedIn profile headline. A headline is meant to grab the reader and encourage him/her to read more. If you need help with this, download my free worksheet *The Definitive Worksheet to Optimize Your LinkedIn Profile Headline* on the <u>free resources page</u> of my website.



2. Look at other people's

profiles. When people see you've looked at their profile, it's quite likely they'll take a look at yours if your headline suggests you might be an interesting person to meet.

Be sure your <u>Profile viewing options</u> setting is on the recommended setting of full disclosure. Then they'll see your full name and headline versus something like <u>Insurance agent at Northwestern Mutual</u>.

3. Share your own posts frequently. This doesn't take as much time as you might think. Simply use the *Start a post* feature on your home page. Most people don't think they have anything to share, but just think about ways you are helping your

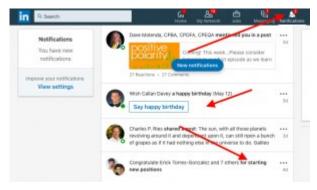


network and/or customers. That's a great place to start.

4. Repost, "like" or comment on other people's posts or published articles. This isn't quite as powerful as sharing your own posts, but the time commitment is a lot less. It only takes a second to click "like," and it's an easy way to stay top of mind with your network.

Consider mentioning them using the "@" sign before typing in their name when sharing one of their updates.

- 5. Put more of your most important keywords in your profile—and put them in the right spots. For help with this, download my worksheet *Keywords: The Key to Being Found on LinkedIn* on the <u>free resources page</u> of my website.
- 6. Endorse people. Not everyone is a fan of this feature, but it does spark lots of engagement—which usually results in more profile views.
- 7. Take advantage of LinkedIn notifying you of your connections' birthdays, work anniversaries, and starting new jobs. LinkedIn uses the Notifications tab to tell you when



these important dates are happening with the people who matter most to you—your connections. So be sure not to just click the *Say happy birthday* button. Take it to the next level and send them a longer, more helpful or inquiring message that should lead to a profile view for you.

8. Start writing long-form articles using the <u>LinkedIn publishing</u> <u>feature</u>. Admittedly, this will take some work, and many of us shy away from writing, but over time this will get you more profile views. Also, one of the best ways to establish your thought leadership is to share your thoughts by writing.

## Take action.

So, which of these steps are you going to take to increase your LinkedIn profile views? And keep in mind that if you get more profile views, you'll then get more traditional interactions (phone calls, emails, meetings, etc.). Of course, this will result in improved ROI for your time spent on LinkedIn.

For more simple strategies to improve your LinkedIn ROI, along with a detailed critique of your profile, be sure to take advantage of my <u>one-hour, one-on-one consultation</u> for just \$197.

This consultation will take place on the phone, and I will share my computer screen with you. There are limited spots available, so don't delay. Book yours today by clicking here.

## Interested in becoming a Sponsor?



Andersen Alumni Association is proud not to charge annual alumni dues and relies rather on strategic sponsorship to fund operations. Given advances in technology and alumni mobility Andersen Alumni Association is seeking a few additional qualified sponsors. If you think your company may benefit from a strategic partnership with the Association, please email us

## **ALUMNI BENEFITS:**

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Andersen Alumni Association has partnered with Lenovo to provide our members with savings when purchasing top quality PCs, tech and accessories from Lenovo. To explore your savings go to: https://www.lenovo.com/us/en/andersenalumni



## **Private Directors Association**

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PDA is providing a 20% discount on corporate or individual membership for Andersen Alumni Association members\*

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## BENEFITS FOR ALL MEMBER TYPES

- Complete your <u>Private Company Governance Certificate</u> at no additional charge.
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- National network of peers engaged in events focused entirely on private company issues, both locally through our <u>21-chapter system</u>, as well as virtually via <u>webinars</u> and online resources.
- ➤ Monthly e-newsletter
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- Dedicated "CISO on Call"
- 30% discount on all additional PDA University Director Education products designed to enhance private company value through high functioning boards.

Visit www.privatedirectorsassociation.org to learn more, or visit us on LinkedIN

\*15% going to the alumni members as a direct membership discount and 5% to the Andersen Alumni Association organization

## Long Term Care - Insurance Coverage

70% of Americans over 65 will need some form of long-term care. And that care will be expensive. According to a recent survey, the cost for long term care can currently range from \$48,000 a year for home care to \$98,000 a year for a private room in a nursing home; and costs are increasing every day. Planning for these expenses with long term care insurance can help you maintain your lifestyle, protect your assets and savings, and give you the options necessary to receive care and services.

BPB Associates of Atlanta has been helping families like yours with their extended health care planning needs for 33 years and has negotiated special discount carrier pricing for Andersen Alumni members. Click here for more information: www.bpbassociates.com/andersenalumni/LTC

## International Travel - Medjet Assist

Medjet provides reduced annual rates for its Air Medical Transfer membership program on a voluntary purchase basis to North American members affiliated with *Andersen Alumni Association*. Medjet provides single point coordination for the safety and protection of organizational clients and individuals/families as they travel for personal or business reasons - domestically and abroad. Zero cost beyond the membership fee for services coordinated by Medjet in medically transporting a member back to a home country hospital of their choice in time of need.

Medjet also offers an optional membership upgrade branded as Medjet Horizon that provides (among multiple membership benefits) a 24/7 Crisis Response Center for **Travel Security and Crisis Response** consultation and coordinated incountry services.

**Learn More/Enroll?** Persons from the U.S., Canada or Mexico can visit Medjet at <a href="https://www.Medjet.com/Andersen">www.Medjet.com/Andersen</a> or call Medjet at 1.800.527.7478 or 1.205.595.6626. Reference Andersen Alumni if calling. Enroll prior to travel.

Reduced Medjet annual membership rates for persons from North America under age 75 start at \$250. Multi-year and short-term rates are also available. Rules and Regulations available online and provided with Member ID cards.

# Social Media: Association's LinkedIn Group (Join), Company (Follow) and Facebook Fan Page (Like)

Social Media is a great way for us to stay connected. To request the Association Status be added to your Linkedlin Profile click on the following URL to JOIN: <a href="http://www.linkedin.com/e/gis/38306/6E0CB25BC94E">http://www.linkedin.com/e/gis/38306/6E0CB25BC94E</a>

Additionally, you can "FOLLOW" the Association by clicking on the following URL:

http://www.linkedin.com/company/andersen-alumni-association?trk=tabs biz home

To "JOIN" our new Facebook fan page simply click on the following: <a href="http://www.facebook.com/pages/Andersen-Alumni/182112725168442">http://www.facebook.com/pages/Andersen-Alumni/182112725168442</a>