



# *Welcome*

## **GEI's 2004 MANAGER'S MEETING**

### **Get Acquainted Project**

- Group by discipline (water, enviro, geo-tech)
  - Sub-group by segment (utility, industrial, commercial, trans)
  - No group larger than 9
- Introduce to each other
  - Name
  - Location
  - Role
  - Years in Practice
  - Favorite food
- Create a marketing pitch for your group
- "Sell" yourself to the room

## Today's Purpose

- Apply our scientific expertise to the running of GEI
- Engages each of us as contributory leaders
- We become conscious and choiceful about our daily behaviors which define GEI's future in 2015

## Products

- Appreciating the scope of talent in GEI
- Acquaintanceship among us the leadership and having fun
- Facing-up to the realities of how the business
- Hypothesis testing...our future is linked to our interdependency
- Describing the linkage between my "being" and leadership
- Description of the culture required to fund our future
- Personal decisions

## Foundational Concept

### Paradigms:

- Worldview
- Filters
- What I do and don't see
- What I will and won't allow in
- My way

# Let's meet Joel

## Panel discussion

- state of business
- perspective from the deck

## Table Analysis

- Summarize the paradigms which underlie the perspectives just shared
- Report out to the group

## **\$hifting Performance Using the *Value Tree***

**"Building financially-based visions  
of excellence"**

"I know no safe depository of the ultimate powers of the *business* but the people themselves; and if we think them not enlightened enough to exercise their control with a wholesome discretion, the remedy is not to take it from them, but to inform their discretion by education. "

--AD adaptation of Thomas Jefferson to William C. Jarvis, 1820

The future  
creates the present  
against a backdrop of  
the past.

## Tutorial Purpose

To demystify the financial world of CFOs and expose the mental model of CEOs

In a way that improves the effectiveness of our leadership

So that we create financially-based visions of excellence for our company.

## Products

- Demystify the world of CFO's
- Provide a framework for our creativity
- Stimulate possibilities
- Appreciate the elegant solutions available to those who can unlock the delicate balances and interdependencies within companies.

## Opening Questionnaire

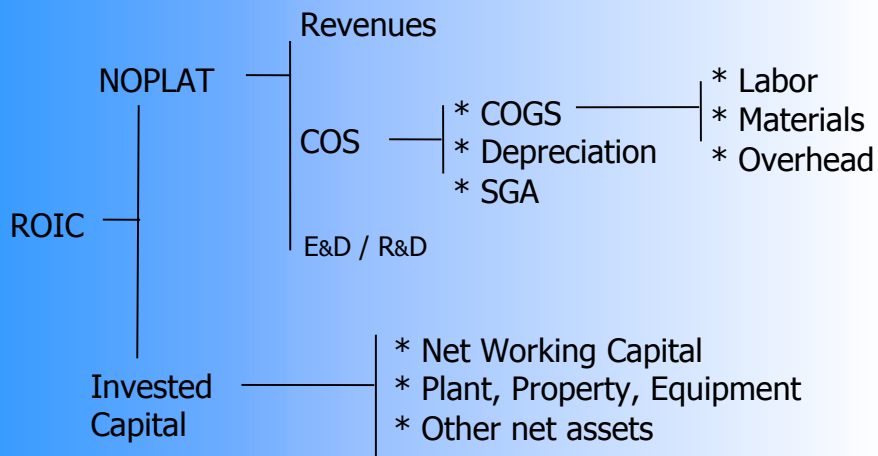
1. Most of our people can personally connect their daily work and associated expenses to an Income Sheet and Balance Statement. T F
2. Our financial people understand the impact of "lean" so well that they are tough negotiators when setting budget expectations for our lean projects. T F
3. Our organization shares a common understanding of the word "value." T F
4. Our Lean-leaders in Hartford have personal vision of value creation. T F
5. "Value" is realized when a lean project has been completed. T F
6. Pursuing lean projects make sense because they are the right thing to do. T F
7. Shared understanding of the city and its finances increases peoples' ability to "do." T F

## What is the Value Tree?

- Financial model of the business on one page
  - Visually oriented
  - Interactive
  - Easily understood by people
- Financial tool for developing business context
  - Interrelationships of various dollar flows
  - Drivers of business decisions
- Financial "range-finder"
  - Target identification
  - Target selection
- Financial-world de-mystifier
- Financial guidepost helping answer the essence question..."Is the institution increasing its value (how much its worth) or destroying its value?"

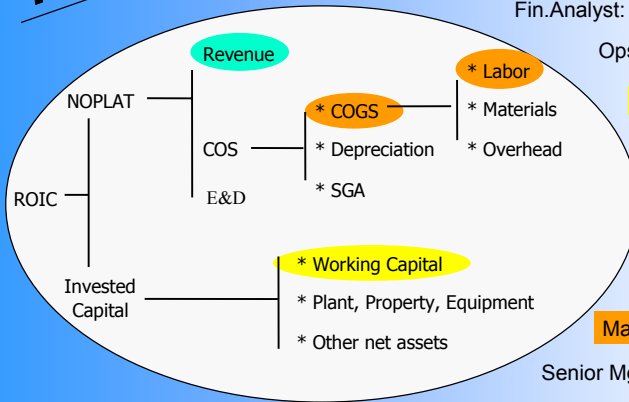
Getting to know "the tree"

## The Value Tree Exercise





# The Value Tree for Targeted Insight



**Sales /Marketing:** Quality of sales \$; preparing for improvements

Fin.Analyst: Budgeting improvements

Ops/Shop: Knowing the big "whys"

**Collections:** Cash management

Procurement: Supply chain mgmt

EHS/Med: Waste chain mgmt.

Quality: More than SR<sup>2</sup>

Facil./Maint: TPM & Utilization

**Managers:** Labor productivity

Senior Mgmt: Targeting & implications

Financial Planning: Detailing long-term performance

Order-to-Cash: Optimizing an enterprise flow

Building the ValueTree™ as a Group

Question

What is the current  
paradigm and culture  
around sales  
accountability?

***Leading Through Excellence***

Freeing  
our creative powers,  
Guided by our personal  
standards of excellence,

Unleashed on institutionally relevant issues...

*The satisfaction of Excellence Achieved.*

## Standards of Excellence

I say to you today, my friends, that in spite of the difficulties and frustrations of the moment, I still have a dream. It is deeply rooted in the American dream.

I have a dream that one day this nation will rise up and live out the true meaning of its creed: "We hold these truths to be self-evident, that all people are created equal."



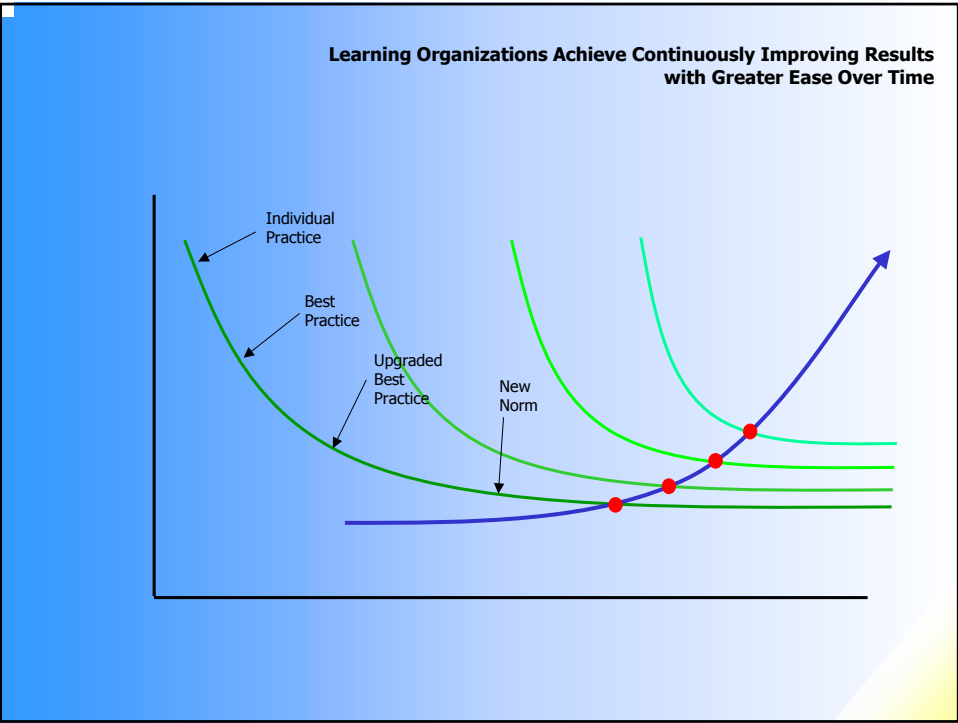
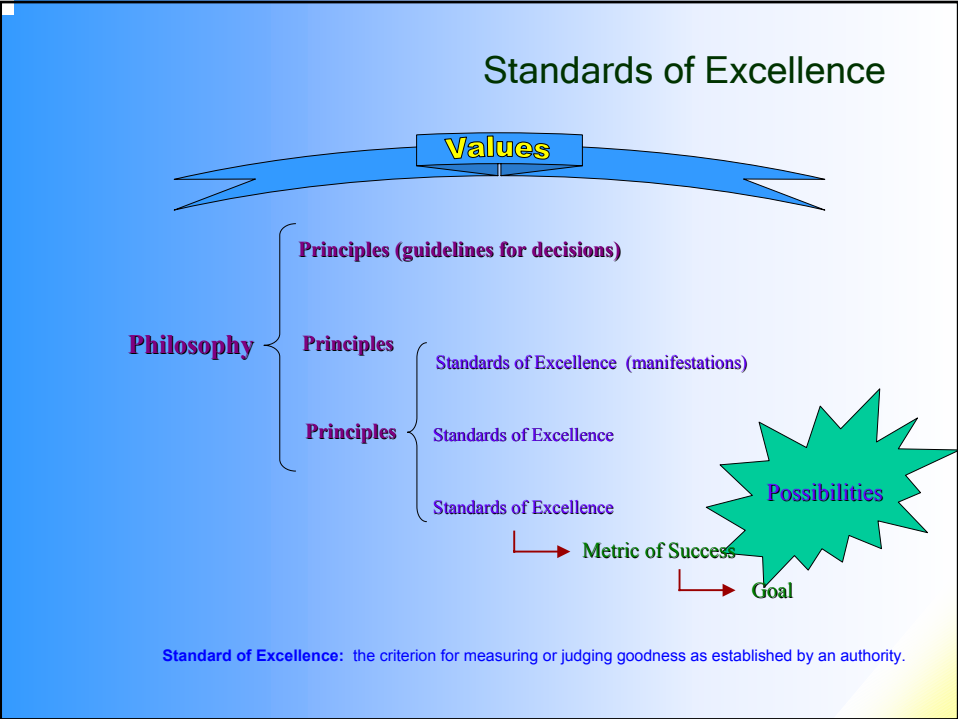
I have a dream that one day on the red hills of Georgia the sons of former slaves and the sons of former slave owners will be able to sit down together at a table of brotherhood.

I have a dream that one day even the state of Mississippi, a desert state, sweltering with the heat of injustice and oppression, will be transformed into an oasis of freedom and justice.

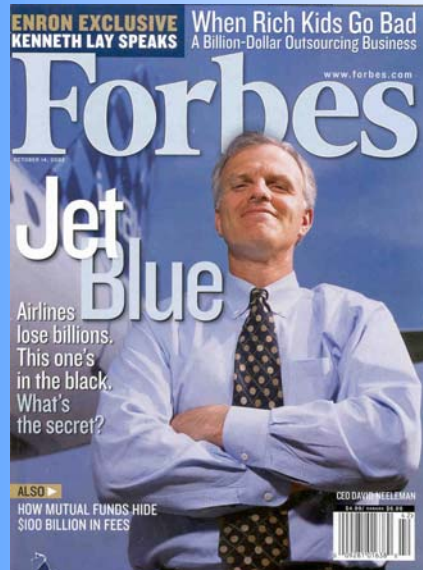
I have a dream that my four children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character.

## Meeting the Greats

What is Valued?	What is their standard of excellence?	Metric of Success?	Metric Goal?



## David Neeleman and the JetBlue Story



## Our Choice

- Poor standards deliver Downright Bad results/rewards
- Good standards deliver Poor results/rewards
- Excellent standards deliver Good results/rewards
- Outstanding standards Take all the rewards



Success Looks Like...

**Given The ValueTree**

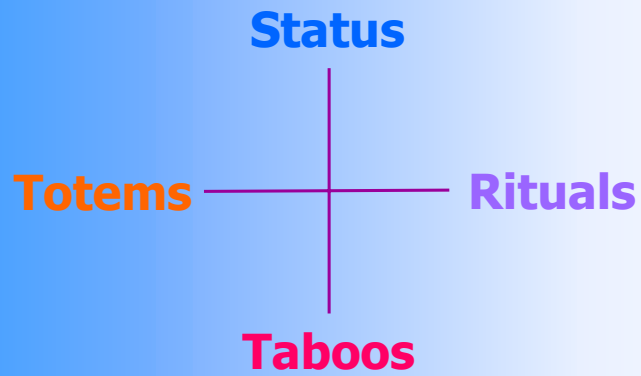
**Let's have a conversation**

**In a way that identifies the standards  
required by this group and the  
impact on personal behaviors.**

New Identity and Image

**Given our conversations up to  
this point, what are the  
different messages you can  
find graphically displayed in  
this logo?**

## The Culture of Our Organization



**Grand Finale**  
**Leadership Exercise**

## Closing Event

- Re-group in cross-functional discipline teams
- Generate an unsolicited proposal for just 1 client describing a complimentary scope of work
- Present to our panel as if fighting for limited SG&A funds

**Drive on to  
Excellence**