



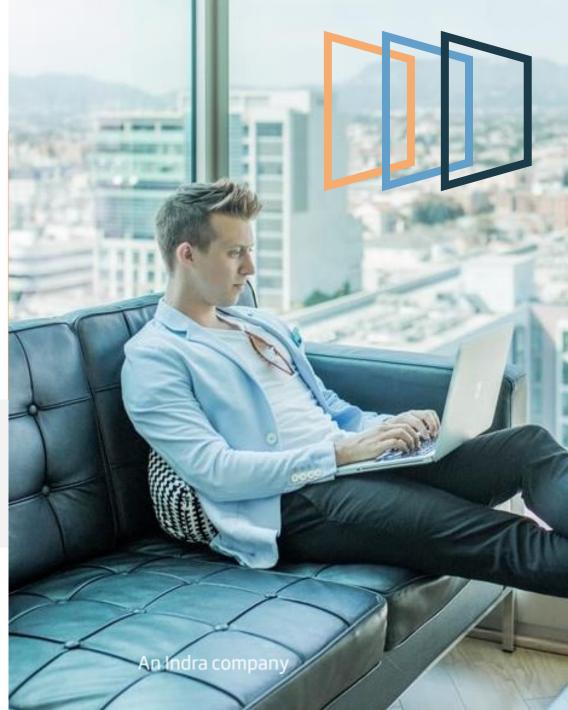


In a context of growing business challenges and hybrid work models (inperson and remote)

Digital workplace for leaders

Improve the quality of key conversations by enhancing M365/Teams with Delibera for more collaborative and executive management processes





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Need and opportunity to develop leadership within the current context

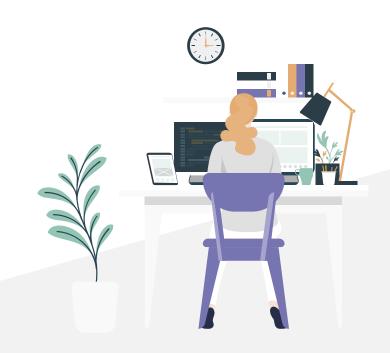


- 1. Business transformation to overcome obstacles and capture new opportunities is accelerating due to the discontinuities caused by COVID-19, multiplying management challenges for leaders at all levels of the organization.
- 2. Transformation must take place within a hybrid work model which requires **quality digital interactions as** challenges are complex and the knowhow to address them is dispersed.
- 3. M365 and Teams have solved an important part of remote management (communications, shared workspaces ...), but if they are complemented and enhanced with Delibera (a Collaborative Intelligence tool), there is an important leap in the quality of management processes associated with leadership (strategic planning, management of committees and agile work groups, transformation offices, asking for/receiving feedback ...), as they are made more participative, making the necessary collaboration for the effective transformation of organizations a reality.
- 4. These management processes resulting from the combination of M365/Teams + Delibera, mainly asynchronous, already made a lot of sense even before the pandemic and the need to work remotely, but now they are vital. Well structured, they configure a new leadership model that is much more collaborative, executive, and digital, where the interaction between people flows, maximizing the possibilities of transformation and success of organizations.
- 5. The impact on the quality and agility of decision-making, on productivity and efficiency, on employee participation and satisfaction, is very high and has been contrasted in more than 60 leading companies from all sectors; implementation is progressive and simple.

Management challenge for leaders have doubled

Accelerate transformation

- More pressure derived from accelerated market change (huge discontinuities, with big threats but also opportunities)
- Opportunity for consolidation in increasingly digital competitive spaces (with a limited window of opportunity)
- There are no easy solutions; knowledge and energy are dispersed (important to include many people and identify changemakers)



Lead largely from a remote context

- Going back to the previous level of office presence does not make sense: for certain activities being together does make sense, but for others it is best to be at home
- It has been proven that if well managed, remote work increases productivity, starting with the leader himself
- Teams that have resisted returning to the office work well and have a better work-life balance
- Leading mainly remotely requires doing certain things differently, it is a great opportunity to think together and include more people, leveraging new tools

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"Collective intelligence is a form of universally distributed intelligence. No one knows everything, everyone knows something. An effective mobilization of skills must be achieved."

Pierre Lévy

Collective Intelligence

Knowledge ("insights") and the energy for change necessary to accelerate transformation is widely distributed across organizations

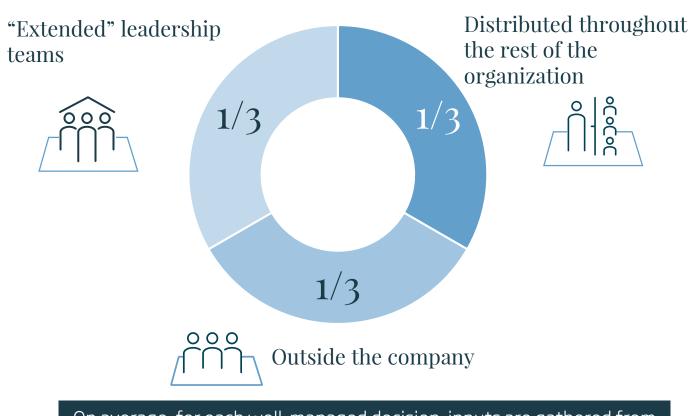
Registered data



"People's "heads"

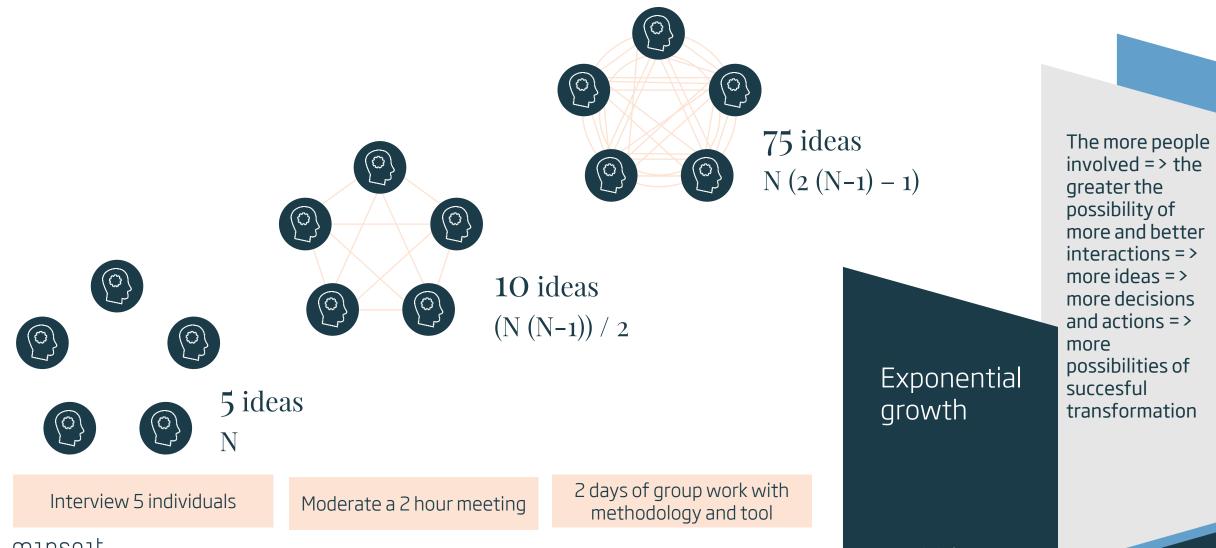


Source: Delibera. Analysis of 4,000 insights/decisions that have contributed significant progress in the transformation of 60 leading companies. "Extended" leadership teams, including middle management.



On average, for each well-managed decision, inputs are gathered from 15-25 people, so three times more people must be asked

Accessing knowledge is not only about bringing many people together. It is about ensuring the quality of interactions between them



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To capture knowledge and understand what the group thinks, we have to enhance leaders' management processes with an "asynchronous" component

- Collaborative management processes cannot be limited to when we are all in a meeting (synchronously) or to unstructured chats
- Organized asynchronous collaboration is complementary
 - It allows participants to think more in depth
 - Increases the number and quality of interactions
 - Can include many more people

Synchronous (all at the same time)



Everyone connected at the same time, but with little time for everyone to speak and think individually



- Communication
- 1 hour

Asynchronous (at your own pace)



Each one expresses what they think and comments on what others have said when it suits them best, when things come to mind, after they research...

Integrated



- Deliberation
- 2-3 days or 1 week

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Access distributed knowledge in an organized way, Teams + delibera: complementary; both essential for leaders

Communication and day-to-day activities





95% of interactions

- Send and receive messages
- Host video conferences
- Share a common agenda
- Share and edit documents.
- Manage tasks and projects

Work together

Key deliberations to understand and decide

5% of interactions



- Understand situations and
 Manage meetings crowdinnovate ideas
- Prioritize initiatives and projects
- Make decisions

- effectively
- Follow-up interactively
- Ask for feedback

Think together

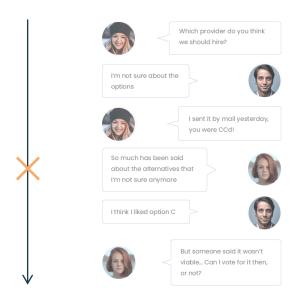


see more at delibera.com

Delibera: Collaborative Intelligence [CI] tool to improve the quality of leaders' key conversations, with their teams and other stakeholders

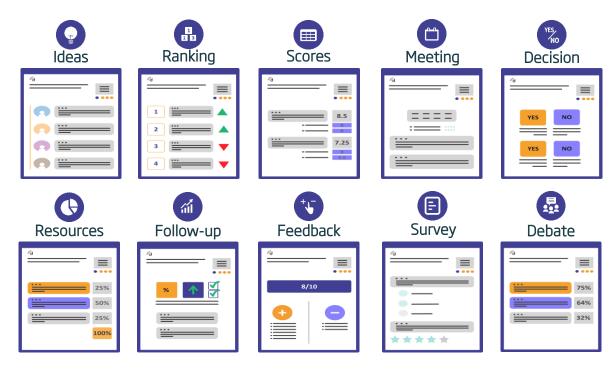
delibera

Designed to optimize deliberation, decision-making, and follow-ups in leadership teams From conversations that follow a chronological timeline... (email, Slack, WhatsApp...)



Timeline

... to conversations structured according to the objective pursued





Organization
In each conversation the
objetive, sponsor, progress and

duration are all clearly visible

Closure The con

The conversation closes with conclusions, decisions and next steps

see more at delibera.com

Relevant daily inquiries from the leader to their team Ideas Template

The CEO of a leading communication company uses this template recurringly to access his management team's knowledge and thoughts on complex matters that require an asynchronous and quality deliberation.

This optimizes subsequent meetings and quickly leads to actionable conclusions.

Examples:

"Propose ideas to shorten distances with the competition that has launched product X."

"Suggest people to immediately fill the vacancy left by Y"

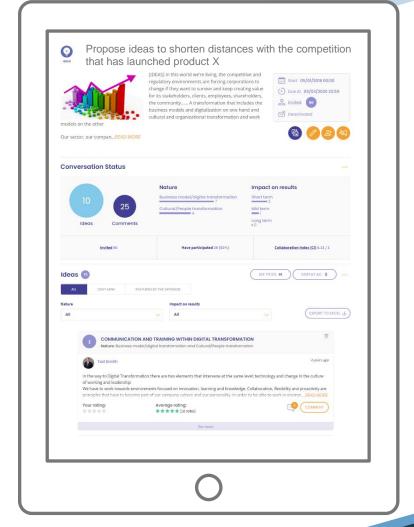
"Considering the competition's expansion, should we open a subsidiary in country Z?"

Ideas can be categorized according to 2 customizable categories

And filtered according to those categories

You can ask an additional specific question to those who give an idea

And export all ideas and their content to Excel to facilitate subsequent treatment



Relevant daily inquiries from the leader to their team Ranking Template



The CEO of a leading automotive steel company uses it to prioritize diversification options with the 18 members of the management committee. Senior executives of a leading global bank use it to prioritize Agile projects for their areas.

Examples:

"What diversification opportunities should we explore first?"

"What problems should we solve first?"

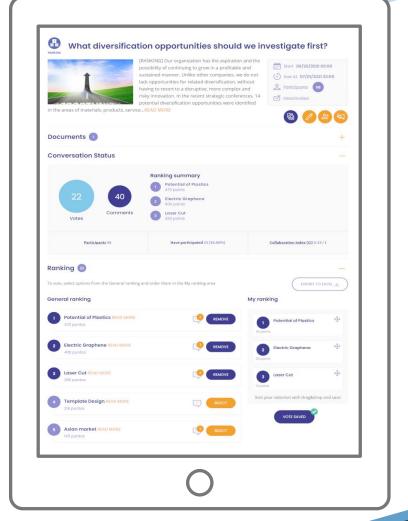
"What functional requirements should we boost in the technological platform?"

"Which initiative should we launch first?"

"Which of these names do we like the most for X?"

Allows you to prioritize and comment a list of options predetermined and explained by the conversation creator. They are sorted based on the votes of participants.

Prioritize initiatives, next steps, products, people, projects...



see more at delibera.com

The Agile software development team of a manufacturing company uses the Feedback template to assess its Minimum Viable Products after each sprint

The unit for product development of a leading technology and software company uses it to assess with users the quality of the M.V.Ps generated by 60 cells working in Agile. Agile culture is enriched by feedback from the end user at different stages of the creation phase. The process is drastically improved and carried out with agility asynchronously.

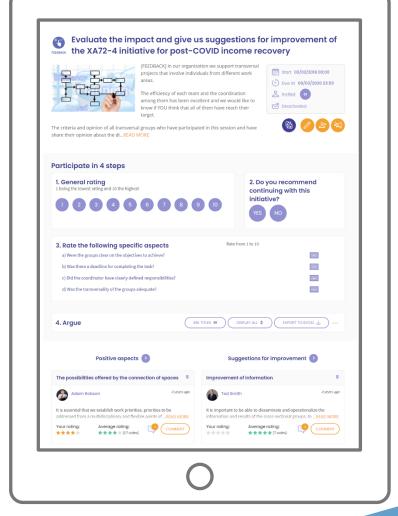
Examples:

"Rate version 3.0 of X RPA"

"Evaluate the services offered by the new internal website in beta phase"

"Evaluate and enrich the current version of App Y"

Export positive aspects/suggestions for improvement and their content (comments/ratings) to Excel to facilitate subsequent treatment





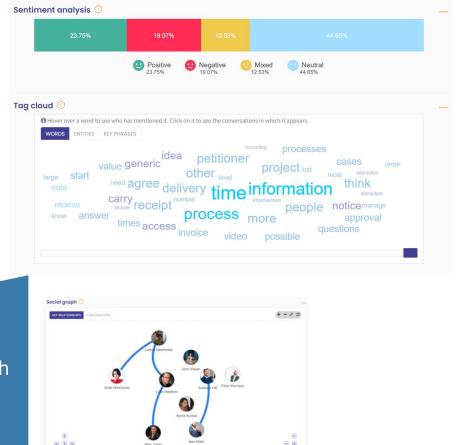
With NLP (Natural Language Processing) to help identify key points, meaning and changemakers within the deliberations

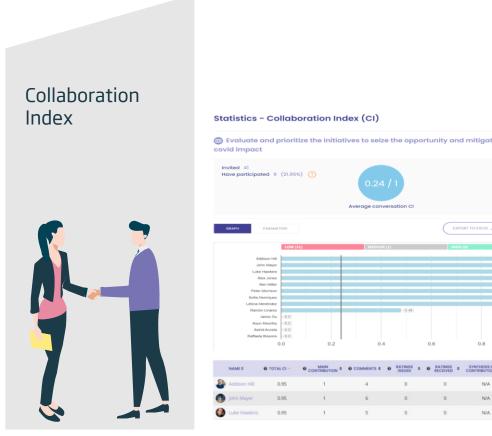




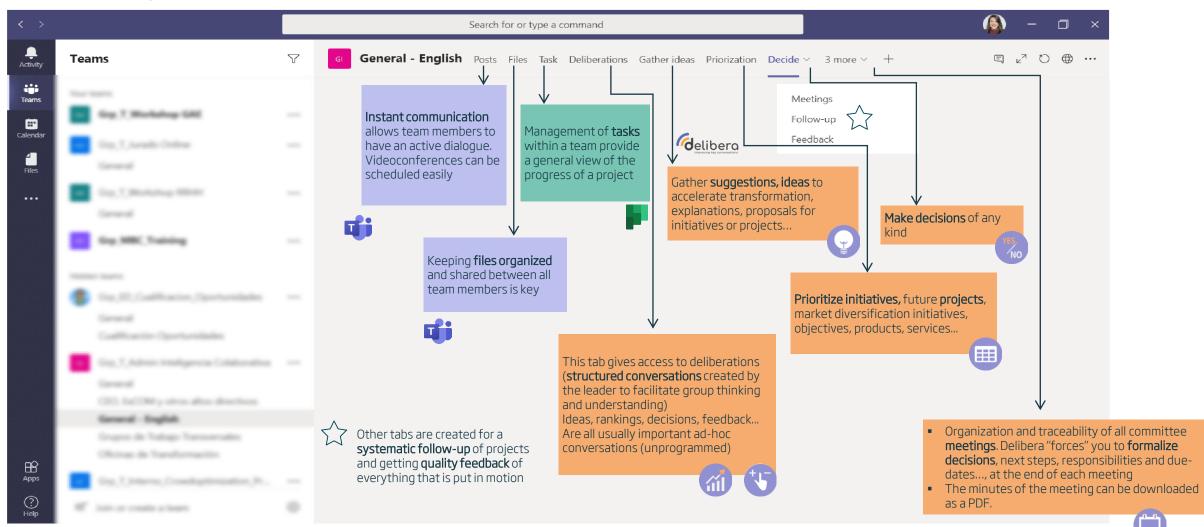
Tag cloud

Social graph





The integration of Delibera conversations in Teams is done by creating tabs containing the different deliberations of interest for that team/channel



Example of Teams + Delibera → Crowd-innovate





To get suggestions, ideas to accelerate transformation, explanations, initiative or project proposals, user stories for Agile groups...



Standard configuration of tabs with deliberations in Teams depends on the-team sponsor

| Sponsors/ |
|-----------|
| Teams |

Recommended tabs







| CEO, ExCOM and other |
|----------------------|
| senior managers |

| Publications | Files | Tasks | Deliberations | Ideation | Prioritization | Decide | Meeting | Follow-up | Feedback |
|----------------------|------------------|--------------|---------------------------|--------------------------|-------------------------------|-------------------|-----------------------|-----------------------|---------------------|
| Instant messaging | Shared documents | Simple tasks | Resources, percentages | Structured brainstorming | Prioritization of initiatives | Make decisions | Minutes of committees | Follow-up projects | Quality feedback |

Advanced Transformation Offices

| Publications | Files | Tasks | Deliberations | Insights | Prioritization | Follow-up | Feedback | Meeting |
|----------------------|------------------|--------------|--------------------|-------------------------------------|--|-----------------------|---------------------|-----------------------|
| Instant messaging | Shared documents | Simple tasks | Strategic planning | Opportunities for improvement | Prioritize projects or initiatives | Follow-up projects | Quality feedback | Minutes of committees |

Transversal or Agile work groups

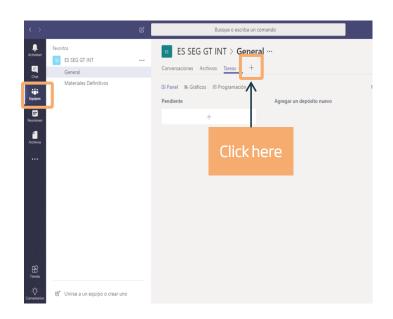
| Publications | Files | Tasks | Ideation | Prioritization | Deliberations | Meeting | Follow-up | Feedback |
|----------------------|------------------|--------------|--------------------------|-------------------------------|------------------------|-----------------------|-----------------------|--------------------------------|
| Instant messaging | Shared documents | Simple tasks | Structured brainstorming | Story/issue prioritization | Resources, percentages | Minutes of committees | Follow-up projects | Quality Feedback of MVPs |



To open Delibera tabs in Teams you just have to follow 3 simple steps

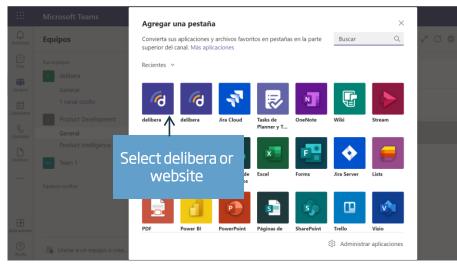


From the Teams team/channel that you want to give access to delibera



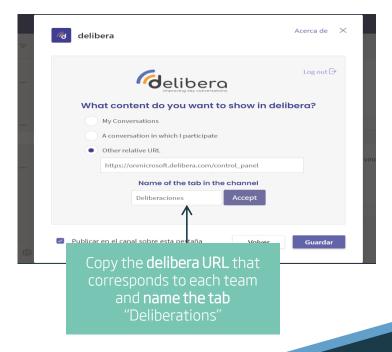


Search for delibera to select it or select the icon for "website" (2 options)





Link each tab to the corresponding delibera URL according to the desired functionality



Our vision of cultural transformation, key to business and digital transformation

Interaction/collaboration processes between people we are interested in acting upon to ensure cultural transformation are those that recurringly or every so often...

No one, no matter how qualified they are, no matter how good a team they have or no matter how well advised they feel, **can on their own** find enough insight to define the right paths to follow with enough guarantees of success.

Let alone expect others to follow them afterwards

Involve a relevant number of people but cannot be standardized or automated via RPAs, Al or ML using Big Data and Analytics (however they can leverage these technologies)

Because necessary and relevant knowledge is in people's heads



We are talking about processes where collaboration is designed, guided, enabled, measured, demanded and recognized



Combining M365/Teams + Delibera, the most important management processes associated to leadership are optimized to be asynchronous and much more collaborative,

Tested in more than 40 leading companies across all sectors

executive and digital

- Transformation depends to a large extent on the quality of leaders' management processes
- Asynchronicity enables everyone to connect when they can and to have time to think
- Inclusive participation
- Better results

Improve the quality of key conversations

Understand and set the path



1. Jointly define purpose, mission, vision, values

2. Crowdnovation of **new business opportunities and revenue streams**

3. Carry out participative strategic plans and reflections

4. Host more dynamic leadership team events

5. Solve together **key issues that come up** day-to-day

6. Jointly identify **obstacles to** effective **transformation**

7. Prioritize initiatives and projects with a holistic vision

8. Optimize meetings and committees

9. Collaborative crowdoptimization of costs, processes, risks and UX

10. Accelerate execution with advanced transformation offices

11. Streamline workgroups in Agile

12. Facilitate **follow-ups** with empowerment and accountability

13. Collect quality **feedback** for continuous improvement

14. Decisively boost remote work

15. Optimize productivity of sales forces

16. Increase the impact of change management processes

17. Transform **culture** with processes

18. Transform middle management

19. Evolve education and training towards collaborative learning

20. 100% digital focus groups

Decide and focus



Execute and follow-



Process 3: "Traditional" strategic plans do not respond well to the needs of our new environment

Problems with traditional plans:

- Strategic reflections continue to be made in a very centralized way by the departments in charge: insufficient top-down perspective (no person or area, no matter how well advised, can do them independently with enough quarantees of success)
- They convey a limited understanding of reality and opportunities, far removed from the needs, capacities and will of the organization as a whole, generating disorientation, disenchantment, and discouragement
- They end up as archived theoretical documents: in the parking lot
- Even though interviews are conducted, interactions are very limited in terms of number, frequency and depth (15-50 individuals)
- They are not dynamic, and quickly become obsolete
- They are made in **communicative isolation (information silos)**, with duplications and limited collaboration, far too slowly
- They lack engagement, sometimes leading to frustration from management and, as a consequence, from the rest of the organization
- They **erode leadership** and wear the organization down by sometimes becoming almost mission impossible



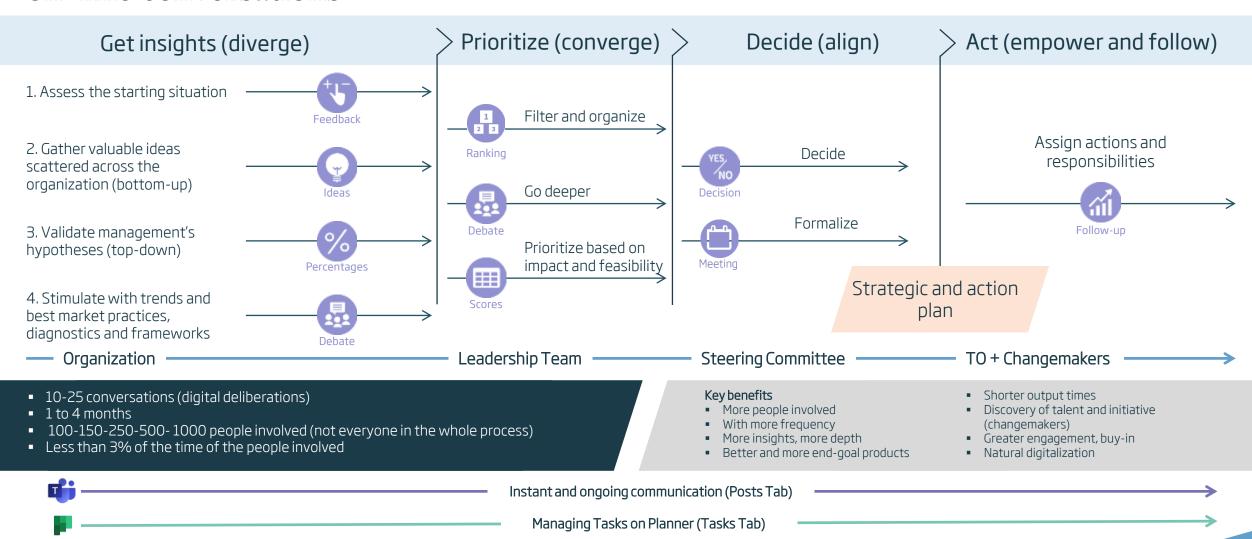
The dynamism, uncertainty and complexity of organizations demand a new approach to strategic planning

Innovation and transformation have to be present from the very first moment, even in the way the plan is made

20

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Participative strategic reflection is mainly built around a progressive sequence of on-line conversations



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On-line deliberation templates that enable collaborative processes

Process 9: "Traditional" methodology - including Agile - for process optimization, has many drawbacks, to date



#1: There is not enough time and it is costly to detail so many processes, no matter how much Agile we apply

The number of processes has multiplied and these, in turn, have become more complex. Most of them are not catalogued or encoded. Depicting the AS IS of hundreds of processes to then define the TO BE takes many months, if not years and/or requires a huge number of people. It is a painstaking and high-cost job, and by the time we're done, business has already evolved. The reality is that most of the time we limit ourselves to redesigning some of the key processes.



#2: And even when we make the "mammoth" effort, the quality of the exercise is debatable

Knowledge about where we fail and what needs to be done differently in these processes is **very fragmented**; we need the knowledge, the **insights of all those who interact with them**, to better understand what is happening ("pain-points") and identify opportunities for improvement. However, the number of people we include in this process is limited because it is **very time consuming**.

We need

An optimization of processes in line with the urgency and depth of transformation. Methodology has to be much more agile, lean, collaborative, executive and digital

100 to 500 processes at a time

100 to 20,000 people at a time

Focus on 5-10 improvements per process

+50% participation/ 90% satisfaction

Identification: 2-3 months; Execution: 4-5

Crowdoptimization allows to redesign processes in a much more agile, collaborative, executive and digital way, and with a better, faster and more "engaging" result for the client

Combining in-person and remote



Onboarding

- Understand the context and objective
- Set the scope and areas to take action in / work on
- Analyze available information
- Select champions from each area and train them
- Open templates
- Create and launch coordination team
- Initial statement

Ideas

- Identify opportunities and proposals for improvement
- Categorize ideas
- Think more in depth of the ideas in dialogue with the Champions

Pre-Analysis

- Review and synthesis of the ideas generated
 - Pre-selection of ideas for Workshops, grouping and revising them
 - Mini business cases
 - Preparation of info for the Workshops

Workshops with CI *

 Workshops with mixed methodology: Design thinking + Cl and work in groups









feedback on the the result obtained

Follow-ups Feedback



Acknowledgments

Impactful, Agile and collaborative transformation plan

Our methodology allows us to:

What sets us apart?

- Take into account more actors...
- ... in less time...
- ... getting more and better ideas by accessing distributed knowledge...
- ... accelerating transformation by identifying changemakers and having an unequalled follow-up method that ensures implementation...
- ... being more efficient (less ppl. and time; more margin)
- With upside options











 Prioritization and enrichment of preselected ideas

Scores

- Contribution of new ideas
- Documentation of initiative
- Group prioritization
- Flash conversations in delibera to ensure that ideas will make a qualitative leap
- Analyze root causes
- Identify keys to success for implementation

Instant and ongoing communication (Posts Tab)

Managing Tasks on Planner (Tasks Tab)

 Getting and analyzing process followed and



Digital

Implementation

in "waves"

Effective meetings



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Off-line activity



Delibera templates

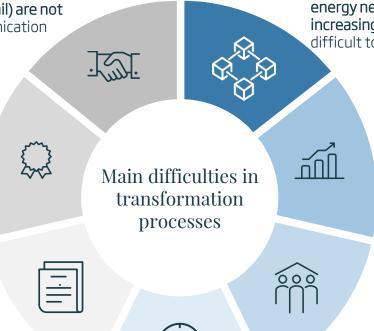
* CI: Collaborative Intelligence

Process 10: PMOs/Transformation Offices face a complex environment and numerous difficulties in their management processes that need to be addressed

#7 Current ways of working (such as traditional meetings or email) are not productive and we are not able to make the most of new communication and collaborative work tools such as M365 or GSuite

#6 The potential impact on results and strategic fit that justified the investment in many projects and initiatives in the first place is hard to measure and verify

#5 Deliverables fail to meet the growing and changing needs of users, which results in a lack of customer orientation



#1 There are no previous references for our current VUCA¹⁾ environment, and the **knowledge of needs and opportunities**, as well as the desire and energy necessary for transformation, is widely distributed among an increasing number of departments, geographies and people, making it difficult to collect and channel

#2 The number of projects has multiplied exponentially and each area/person defends theirs as critical

#3 New Agile methodologies for project management contribute significantly but fall short when it comes to managing transversal work groups (TWGs), where it is necessary to guarantee participation and collaboration

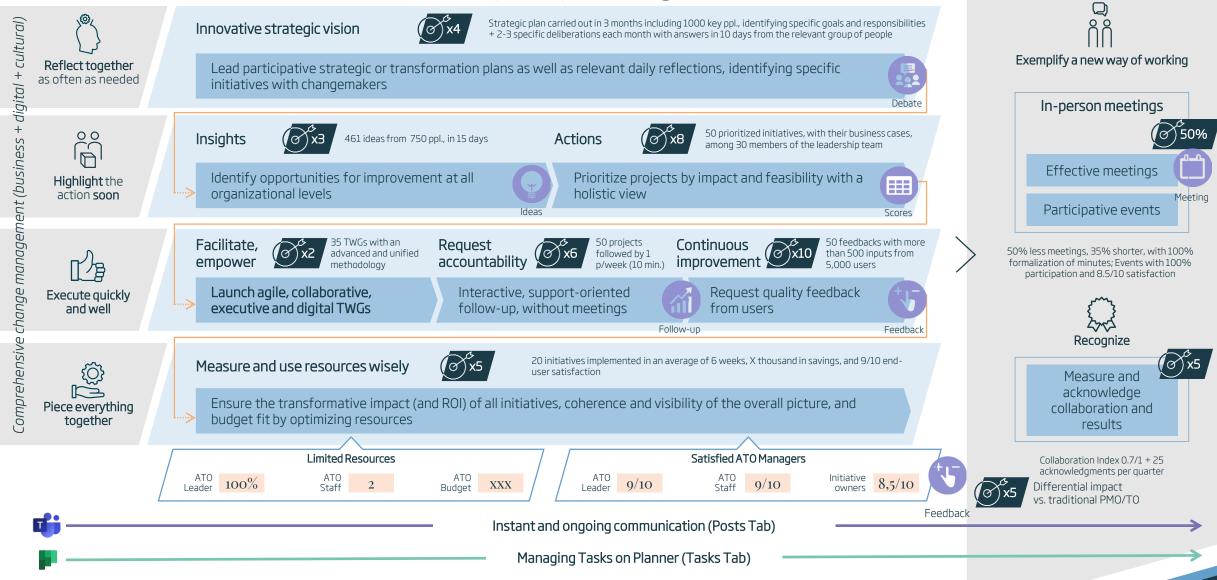
#4 Following-up with the necessary frequency and depth, avoiding new information silos, to achieve objectives is mounting in difficulty

Identifying and understanding them clearly is the first step in designing or optimizing an ATO

 $\ensuremath{^{(1)}}\mbox{Acronym}$ for Volatility, Uncertainty, Complexity, Ambiguity Source: Minsait



Advanced Transformation Office (ATO) managed with Delibera + Teams



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Process 11: Agile/Lean methodology brings substantial advantages to the *modus* operandi of transversal work groups, but it has limitations



- All departments are represented and involved
- Work in **sprints** (Value delivered in iterations)
- Minimum Viable products (M.V.Ps) and Lean (minimum cost)
- Allows continuous measurement and adjustment with customer inputs
- Design thinking for co-creation
- Rigor in lifting AS IS and TO BE
- Customer journeys and paint points, to ensure customer perspective

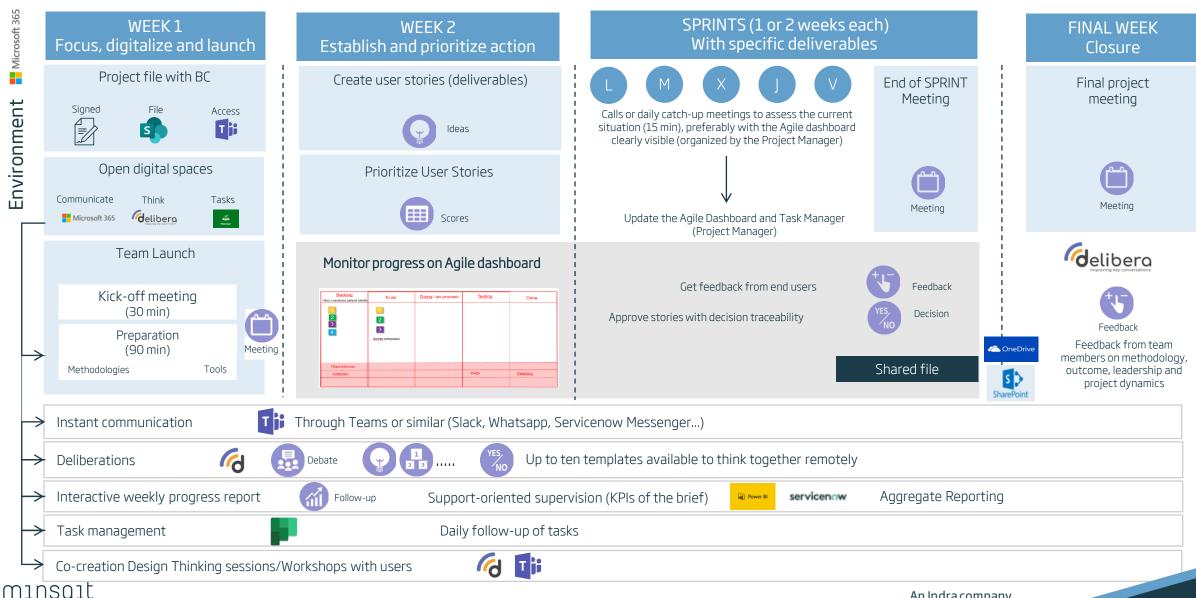


- It requires a lot of presence (in-person) and is **less productive and collaborative** than it seems: "Being together in a room once every X is not enough"
- (Limits in terms of the number of people you can include, the objective and progress can become unclear, there is not enough time to listen to everyone and think together with the required amount of depth, too many meetings with biases, workshops are more "playful" with post-its than effective, participants are not well connected in-between meetings, difficult to have rigorous follow-ups...)
- Insufficient customer orientation: "It is not enough to include them only at the beginning"
- Too slow if we have to figure out the AS IS and TO BE of dozens or hundreds of processes: "We are late and, moreover, people usually give solutions when they talk about problems"

Incomplete methodology, which limits the <u>effectiveness and efficiency</u> of TWGs, as well as <u>scalability</u> in terms of their number

We need to streamline, digitalize, increase collaboration and broaden customer focus in Agile/Lean

Example: Weekly sequence in Agile work-cells combining M365/Teams with Delibera



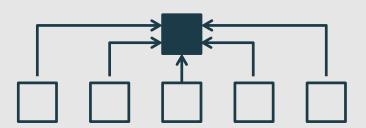
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Process 13: Feedback collected by surveys can turn out to have as much collective intelligence as "stupidity", and we need to collect quality inputs

Survey



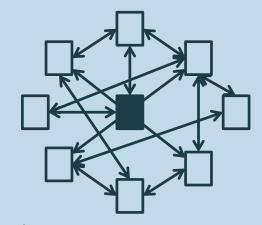


To evaluate

- There is no dialogue between the person that asks and the person that gives feedback
- They can be intimidating
- For end customer
- Useful/ necessary for final products/ mass reviews

Collaborative conversation









To improve

- Interactive dialogue for continuous improvement with representative groups
- Perceived as valuable
- Internal client



Decide what we need to ask feedback about (Posts tab)



5 easy steps for quality feedback and continuous improvement via Delibera

Those invited to give feedback evaluate what they've been asked about and a series of other specific aspects from 1 to 10, and indicate if they recommend continuing with the initiative or not

They give positive aspects and suggestions for improvement, and comment on the contributions of others to further develop them. They can also rate contributions, prioritizing them according to relevance

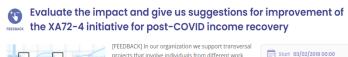
The person asking for feedback <u>comments</u> <u>contributions</u>, asking for or giving clarifications where needed, being able to edit the titles of contributions if they deem it necessary

They also <u>draw conclusions</u>, <u>propose decisions</u> and <u>give recommendations</u> considering all inputs received

Participants can <u>comment</u> on conclusions and decisions during the established time

60 min total

Traceable enhancements



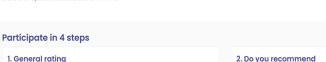
Due At 08/03/2020 23:59

continuing with this

initiative?



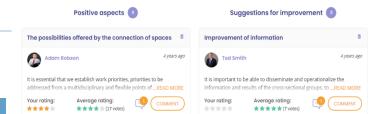
The criteria and opinion of all transversal groups who have participated in this session and have share their opinion about the di...READ MORE



1 2 3 4 5 6 7 8 9 10

4. Arque





Objectives pursued

Continuous improvement

Customer orientation

Collaboration and constructive dialogue between areas

Digitalization

Transformation agility

Feedback to which it applies

Minimum Viable Products, Computer Deliverables (Web APPs, Tools...), products, services, channels, operation of work groups or specialized units, campaigns, Initiatives, departments...

Required training

Delibera Feedback Template

Feedback Certification: 45" Guide available



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VON EXPRAUSTIL

The impact when optimizing management processes by combining M₃6₅/Teams + Delibera is substantial for operations and cultural transformation



Streamline and formalize decision-making

-75% time dedicated to decision making, with improved quality

Facilitates leadership and empowerment

From 5 to 250 ppl. involved in each decision in an organized way

Facilitates following-up (accountability)



Optimize meetings

35% fewer meetings

More productive, participative and conclusive

Shorter (30-45 min. on average)

Conclusions and next steps 100% formalized



Get ideas/opportunities for improvement

Generate 100-500-1000 ideas in a short amount of time

Greater progress and 100% organized follow-ups

Including a substantial part of the organization in a simple way

Shorter output time (supportoriented supervision)



Streamline follow-ups

Follow-up: 10 min. instead of 1 hour per initiative or WG

100% accountability of what you put in motion

Direct communication channel with the initiative owners

Done online including all key people



Carry out participative strategic reflections

Include up to 500-1000 ppl in all phases of the reflection

Higher quality and more grounded by being based on more insights

Carry out the reflection in a short period of time (2 to 4 months)

Identify changemakers and passion-killers



Host more dynamic events

Agenda and content much more adjusted to needs

Greater alignment between sponsors and participants

Much more participative events (participants become protagonists)

Less effort to organize



Get continuous quality feedback

Quality feedback across the board from relevant people

Makes collaboration for transformation a reality

Streamline active listening and continuous improvement

Facilitates leadership, participation and engagement



Define and manage shared action plans

Strategy focused on action, with clear responsibilities

Greater progress and 100% organized follow-ups

Shared view of progress

Shorter output time (supportoriented supervision)



Boost collaborative learning

80% online participation, digitalizing naturally

Processes that change culture

3 Transformative initiatives per month

95% want to continue (takes around 1.5% of time)



When you manage to implement enough of these processes...



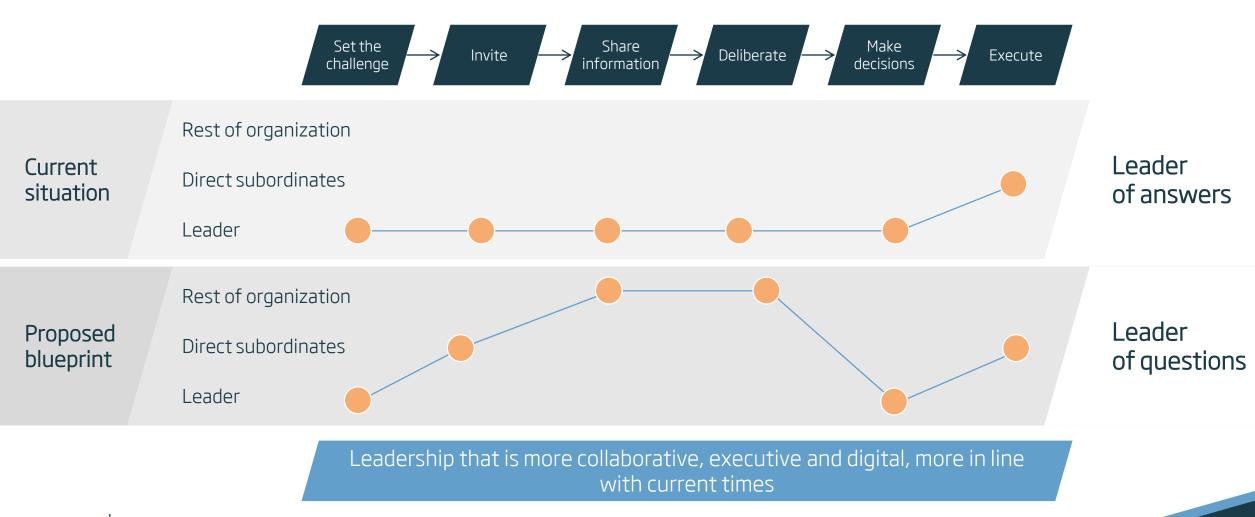
Create an organization and a way of working that is agile, collaborative, executive and digital

Streamline Agile and overcome the obstacles that it is creating

Transform culture:

Collaboration must be designed, coaxed, channeled, demanded, measured and recognized (The desired collaboration is achieved when the right leader management processes are implemented)

The combination of Teams + Delibera transforms the management model: from being "the leader of answers" to being "the leader of questions", maximizing chances of success



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In short, it facilitates your leadership... to accelerate transformation

Put the knowledge and capabilities of each of your team members to good use

Engage them to find solutions as well as fix problems

Lead through intelligent questions (delibera) that stimulate you to move forward together and learn along the way, while always keeping everyone informed (Teams)

Wisely combine the best of *in-person* and remote work

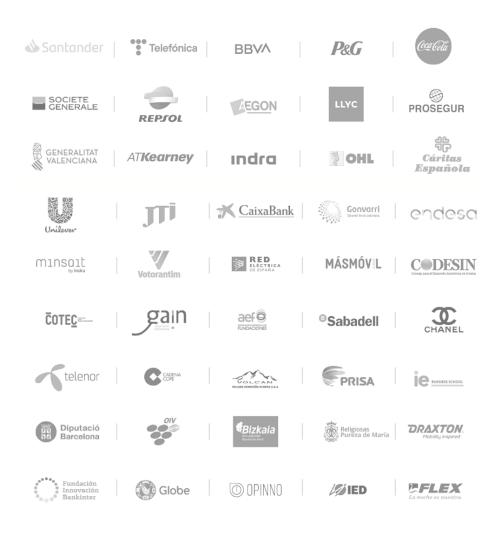


Exercise leadership with a human element that is at the same time, executive, collaborative and digital, essential for effective transformation

Facilitated and enabled by management processes channeled through M365/Teams + Delibera

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Minsait demonstrates this actively every day with projects in leading companies from all sectors



Certified partner in Collaborative Intelligence

- Diagnostic of the needs and opportunities of 100% digital management processes
- Proof of concepts
- Parametrization and personalisation
- Training and assistance with solutions
- Global coverage









An Indra company

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