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## Driving Change from the Inside



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**CEOCFO:** *Mr. McCafferty, would you tell us how Tandem Solutions is aligning operations with strategies for optimal results?*

**Mr. McCafferty:** We started the company sixteen years ago because we knew that there was a big gap between strategy and results at many companies. What's missing is consistent and effective leadership of the change needed to realize the promise of a strategy. Consulting firms are historically good at putting together a plan and then handing it off to a client. The problem is that too often these plans are too academic and don't fully take into account the impact a new strategy will have on the workforce. New strategies usually require change and the reality is that organizations change when people change. The research on change programs in companies reveals that only about 25% actually deliver on the intended outcomes, and in recent years, these numbers have been getting worse. When we started the firm, we set out to help our clients manage change in a way that would allow them to deliver on the promise of their strategies in a sustainable way.

We knew that part of the solution was developing extended teams that could drive change from the inside, NOT by a bunch of consultants running around inside the organization. So our approach focuses on three main areas: First is a different kind of consulting engagement that emphasizes facilitating change with our clients, rather than just developing plans and giving them the answer. We place heavy emphasis on working with our clients to develop an approach that will allow them to move the organization forward. We also have very strong leadership training and executive coaching practices to help build the leadership bench strength in client organizations. Lot's of firms work with top leadership but we go a lot deeper because to succeed, change programs need strong leadership throughout the organization and not just the top layer. Our approach strives to develop leaders at all levels who can make the connections between the promise of a strategy and the reality of the day-to-day work in the organization. That is the main focus of our work and how we help our clients align with the strategy.

**CEOCFO:** *Would you give us an example of how you would work with a company to implement a plan?*

**Mr. McCafferty:** Every client is different and we work hard to customize solutions that "meet them where they are." One example might be that we get a call from a CEO or other C-suite person who says they have recently gone through a merger or some type of acquisition activity and they need a way to align the now unified organization. We would start by helping them figure out things like new governance and organization structures and how to create the types of incentives and drivers for the workforce to get everyone aligned. Most importantly, we spend a lot of time with folks talking about culture. One of the big challenges with M&A is you get organizations that come together and the marriage makes sense

on paper, but you really have two very different cultures and the merger could struggle unless you address that. We spend a lot of time working with the executive team defining the type of culture they are trying to build and then trying to turn that into a tangible series of observable behaviors and artifacts, so it can be clearly communicated and embraced by the organization.

As part of the communication, we typically look for ways to create the right types of incentives around behaviors across the organization. This can sometimes take the shape of specific behavioral assessments of leaders or supporting project teams by helping them create the right culture on their teams. It is not just the top part of the house but at multiple levels within the organization where you have to say "listen, these are the types of behaviors we're looking for and get folks to model and create momentum in that direction." So we work with the teams to engage them and encourage them to be part of the solution. We like to say that at Tandem Solutions, we do change WITH you, not TO you.

The final piece is developing the bench strength to lead the change. Helping emerging and mid-level managers develop their leadership skills is critical to success. It's really common for someone to be promoted because of their technical skills, but the move to leadership requires them to shift their focus from getting their work done to helping their teams succeed. This is a really difficult mindset shift for many folks and our programs are designed to help them through it. We have a number of different training programs that help our clients develop their leaders broadly across the organization, and our executive coaching practice allows us to use more of a rifle shot approach where we would support specific development opportunities with a number of leaders over the course of generally six months and sometimes a year.

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**CEO CFO: *How do you help people that may not want executive coaching or might have resentment toward someone coming in from the outside?***

**Mr. McCafferty:** There are some folks that aren't particularly open to coaching and that can make the early stages a little challenging. We feel very strongly that one of the most important things in a coaching engagement is the relationship between the coach and the person being coached. You need to be able to establish a strong trusting relationship. We have a number of outstanding executive coaches on our team and we let the individual on the client side pick whatever coach they want to work with. As an example I just had a conversation with a senior executive about a week ago and the purpose of the call was to get to know him a little bit and help me get a sense of who might be a good coach for him. Subsequent to that I gave him three resumes so he could interview the coaches and decide which one he liked the most. I think this initial step helps us get past the reluctance by finding the right match.

The second thing is that we are all certified as coaches through the International Coaching Federation, and our training allows us to help people open up over a period of time. So we do have a lot of success with folks that maybe are a little reluctant at the outset, but the various techniques that we use as professional coaches helps get them to open up a little more.

Lastly, I think there's a clear need for accountability in the coaching relationship, which is why we generally engage at sixth-month intervals. At the outset of a coaching engagement we usually sit down with the person we are coaching and their boss, and discuss goals for the six month time frame. That allows us to set some sort of agenda and gives us some accountability. Of course, all the coaching conversations we have are confidential, but this type of up front agreement helps set a general direction for the engagement. At the end of the sixth-month timeframe it allows us to circle back again with the person and their manager to talk about what they have been working on and where they think they are on the journey. At this point, we sometimes we agree to reengage for another six months and sometimes we don't. If we do, we take the time to set new goals that we can reconsider six months later. If we aren't moving forward with coaching, these meetings help us ensure at least a warm hand-off to the manager so the person we have been working with will have some type of ongoing support. I think this type of accountability is sorely lacking in the executive coaching space, and it's a really important part of our process.

**CEO CFO: *What types of companies turn to Tandem?***

**Mr. McCafferty:** Our clients are all managing some type of transition and usually need support to build the leadership depth required for success. We are based in the Boston area so we have a preponderance of clients in the Northeast, but we have also leveraged technology in a lot of ways that allows us to serve clients virtually. Although all of our clients have been US based, a number have been large global enterprises, and we are able to support them frequently through online meetings, particularly for our training programs.

Our training platform is web based, and it allows us to serve up content globally. However, all our programs also include a small-group coaching component that helps the learners develop the insights they need to actually apply new concepts on the job. We can do these sessions either in person or via video meetings, so we can really service people anywhere.

We work pretty horizontally across a number of different industries. We do spend a fair bit of time in the healthcare industry and higher education, mostly because Boston is strong in healthcare and higher education, so if we are looking for clients close to home, those are prominent industries. We also work across the full spectrum of insurance, manufacturing and aerospace.

**CEOCFO: *What do you need to know about the industry, to help your clients, or does it matter much?***

**Mr. McCafferty:** The industry always matters but not to the extent that folks often think, particularly for the type of work that we do. Other factors like the size of the organization and where it is on its growth path are equally important, because they will have a huge impact on the organization's culture. It's also important to consider the magnitude and urgency of the change program. For example, a company that is losing money or market share and needs a turnaround will need a really different solution than a company that has been growing and doing well, but has new ideas about how to better capitalize on a new market opportunity.

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Folks often ask me how I do my job because I am working with an insurance company one week and aerospace manufacturer another week, and a hospital system another week. They want to know how I know so much about all those different things. The answer is that we know a lot about leadership and change and those principles translate well across most industries. Frankly a lot of the industry knowledge frequently comes from our clients, while we focus on putting together change programs that work within their organization.

The change really does have to be driven from the inside. To that end as consultants, we work a little bit differently from other consulting firms; we view our role more as facilitators of change. It is not uncommon to see one of us working with a group of ten or fifteen clients on an initiative. With one of us and ten or fifteen folks from the client, there is an awful lot of expertise in that room. Our job is to help channel that expertise and work with our clients to apply change management and leadership principles to their unique situation. As I mentioned even more than industry, the organization's culture has an enormous impact on how we have to work and what the client is able to do. We have to respect that and work with them to make the moves they want in a way that works within the company's culture.

**CEOCFO: *Tandem Solutions was recognized by Silicon Review as One of Fifty Innovative Companies to Watch. You were also recognized by HR Tech Outlook. How are you garnering attention?***

**Mr. McCafferty:** We haven't specifically gone looking for the attention but we are delighted to have it. What has happened is that a few of our clients have made some connections and comments. The important piece about the recognition is that it has been essentially promoted by our clients, not by us. I think what is important about us is that our approach to consulting is really very different, as far as I know there is no one else who actually attacks the change management component of our consulting work the same way that we do. Our strong philosophy that change has to be led from inside has led us to spend a lot of time focusing on facilitating the client change. We have also and built a truly unique approach to learning that we have applied to all our leadership development programs.

Our leadership programs are designed to be interchangeable and we can take them apart and put them back together in a number of ways. So they're very modular, which allows us to customize a program for our client very quickly. The other

unique thing is our approach, which we call Longitudinal Learning™. The process combines focused pre-work, online learning, exercises to apply on-the-job, and small group coaching to help the learners work through the process of adapting new concepts in their daily life. Our clients love it, and it allows us to help them get to much deeper levels of understanding than any traditional training program.

**CEO CFO: *What is ahead for Tandem Solutions?***

**Mr. McCafferty:** What we have is probably more of the same. We have recently codified our approach to our coaching that we use as part of our leadership programs. It is a distinct and very clear approach that we use to doing that work. We started certifying folks as TandemCoaches to engage with our clients and deliver the programs. The certification allows us to ensure that we have a consistent approach to the coaching associated with all of our programs. On the consulting side we have a number of different tools and frameworks that we use to research and expand as we are going forward.

