

INTEGRATED BUSINESS TRANSFORMATION

Maximizing Value by
Connecting Strategy to
Key Capabilities

Personally, as general manager and president of several companies, the support of Wilson Learning Andina and its Integrated Business Transformation approach have been of great value for my professional development. Since the mid 90s, I have been supported by the integrated consulting of Alberto Pérez and his consultancy. The integrated transformation approach, which brought great results and significant benefits to my companies and their customers, is now available to readers. This book, by Alberto Pérez, collects the theoretical foundation, method and success stories that show the application of his approach in different countries and different industries. I am confident that the Integrated Business Transformation approach will be, as it has been for me, of great value for any manager who wishes to apply it.

—Nelson Echeverría, president and executive of a
global chemical company

Passion, service, forcefulness and discipline are characteristics that differentiate regular companies from great companies, which stand out by truly being high-performers. In 2012, we faced a reality: we were a company that was growing and meeting its goals, but we were far away from being a high-performing company; each division and each individual lacked that last mile to become extraordinary. We knew that our main effort had to be directed towards our biggest asset: our human talent. We selected Wilson Learning Andina as our strategic partner to undertake this transformation. Today, we can proudly say that we have transformed our tendency and that we have solidly

transformed our company into one that not only meets its objectives, but that has, in its DNA, the ability to focus its activities on that extra mile and to positively surprise all its stakeholders.

—Enrique Türk, president of 3M Colombia

This book will effectively show you a way to support organizations with different needs; and we have witnessed firsthand the power of this consulting. It was our privilege—one that only a few have had—to know that there is someone out there who understands and interprets you and who can help you implement your strategic intent. At the end of the day, it was a great success to reach all of our stakeholders, modifying their behaviors and transforming the paradigms that for years were unchangeable in the industry. Only those who lead the industry today and who witnessed how this method works and how it is sustainable through time know that we went ahead of our time thanks to the support of this method.

—Miguel Múnica, former CEO of Roche Mexico

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BY

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Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2018

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British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-78769-052-3 (Print)

ISBN: 978-1-78769-049-3 (Online)

ISBN: 978-1-78769-051-6 (EPub)



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INVESTOR IN PEOPLE

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FOREWORD

As we go through life, we meet and work with many different people. Do you ever get the feeling that there are some people you are just meant to meet and to work together? I believe that about Alberto Pérez and me. One of the highlights of my career at Wilson Learning Worldwide is my long and fulfilling professional and personal relationship with Alberto.

In 1970, Alberto graduated with a BS in Psychology from Javeriana University in his native Colombia, and then went on to receive his masters and PhD from Leiden University in the Netherlands in 1977. Following graduation, Alberto went to work for Dow Chemical, eventually becoming the development manager for Latin America. Alberto's first contact with Wilson Learning was in the 1980s. He already had a vision of individual and organizational transformation when he selected us to help him impact behavior change within the Dow organization in Latin America. Working with Wilson Learning provided Alberto with exposure to our industry and the unique opportunity to understand, as a customer, what works and what doesn't work in his efforts to transform the business. That experience in combination with his academic background became the seeds of a vision to form his own organization and follow his calling.

Alberto left Dow Chemical and formed his own organization, Alberto Pérez and Associates. In 1990, Alberto became Wilson Learning's business partner in Colombia. Since then

he has overseen the growth of his business, now called Wilson Learning Andina, to other parts of South America, Latin America, and Mexico. I met Alberto in the early 1990s when I was assigned to support the growth of his business. What started off as just an assignment, quickly became a life-long partnership based on a shared vision, mutual respect, and trust. Alberto brought me to Colombia to work with the executive team of his best customer at that time. While I was initially drawn by the passion with which he attacked his work, the project gave me the opportunity to listen to and understand his vision for the work he personally wanted to do, and for his business.

I learned that Alberto was very interested in the impact change was having on an organization's ability to adapt and succeed, as well as the impact of change on an individual's behavior. Alberto shared that his personal vision was to contribute to the growth, freedom, and transformation of people and organizations. He didn't think of it as his job, but as his vocation – what he was called to do. An important part of that vision was the belief that the only way to transform organizations was having individuals first transform themselves. The core philosophy of his organization became “to impact the transformation of the individual and the organization integrally in order to add value to growth and sustainability.”

Another part of the vision was related to what kind of an organization he wanted to have to achieve individual and organizational transformation. At that time, our industry was primarily training focused. The primary work with customers was centered on the learning event itself. He understood very early that it is not just about what you learn, but it is about what you use and apply that transforms individuals and organizations. Expanding the focus to include both the learning and the application required a more consultative approach.

Alberto's vision was an organization that integrated the best of the training industry with the best of the consulting industry. It is through that integration that he and his team have been able to impact individual's lives and deliver measurable results for their customers' organization.

I have had the good fortune to stay connected to Alberto and his team as they have been executing the vision calling over the last 26 years and watching the vision unfold. Alberto understood that in order to move from theory to application, he not only needed a strategy of business transformation, but also a methodology to guide the transformation process. The consulting model that he developed, and you will learn more about in the book, is a synthesis of Alberto's academic studies, preparation, and the years of experience drawn from his personal approach to the business practice. The model has not only been used to create impactful results for his customers, but also as a source of attracting others with a similar vision to join the organization, execute the strategy, and to grow and perpetuate the business. Alberto and his team have stayed true to their vision and purpose by the way they communicate and act consistent with their values of integrity, courage, growth, fairness, generosity, and meaningfulness.

This book has been 40 years in the making. In the last 26 years that I have been involved, I have seen the growth and evolution of Alberto and his team. The professionalism and capability with which Alberto and the consultants in Wilson Learning Andina approach their customers, and consistently produce measurable results. Wilson Learning Corporation has an annual global sales meeting. We always have sessions focused on customer success stories, intended to inspire others to strive for such excellence with their customers. Over the years, Alberto and his consultants have been frequent presenters in those sessions. Also at the global sales meeting, we

periodically have a customer panel where actual customers attend and discuss the impact Wilson Learning has had on their organization. Multiple times, customers of Wilson Learning Andina have been part of the panel, and have shared the power of the work that was done with them.

Alberto laughing recently reminded me with a laugh that when he and I first discussed his vision, I responded by saying, “I like it!” I liked the vision then and I still like it today. Alberto has reached a level of professional maturity where he has demonstrated he can deliver value to people, organizations, and society, and has something important to say about how to do it. The vision, the philosophy, the values, and the methodology of what Alberto has implemented has aged and matured like a fine wine. It is now time to uncork the story. I know that on both a personal and professional level, this book represents the realization of a dream for Alberto, by being able to share his philosophy and approach with others. If your interest is to understand the philosophy behind, and the approach to, individual and organizational transformation, then you have the right book in your hands.

Tom Roth
Chief Operating Officer
Wilson Learning Worldwide
September 20, 2016
Orlando, FL

PREFACE

Ulu Ka Hoy (The Hoi Vine Grows)

*All life is **connected**, same as is all circumstances.*

*Understand your intentions **before acting**, as
actions plant the seed of the future.*

*Your **focus** becomes your reality.*

—Hawaiian proverb

It has become commonplace to say that in today's world, "the only constant is change." But, what does this really mean?

As it is readily verifiable, the whole universe is, in fact, in constant dynamism, transforming itself continuously and in close interdependence. The human being does not escape this phenomenon, where his own self is ever changing.

The business context has also changed dramatically in recent years. Technology's transformation rate grows exponentially and it is expected to take a stronger leap in the next 10 years than it did in the last 100. Business models are consequently transformed: today's largest worldwide transportation company has no vehicles, the largest hospitality company does not have a single room, and trade transactions are made with virtual money all around the world.

Nevertheless, all of this does not make sense if we forget that in the center of all is the human being, who struggles for

a sense of stability, sometimes losing sight that change allows for growth, as long as individuals are able to adapt themselves to a new context.

Therefore, after more than 40 years of maturation, this book emerges in response to the question: How can organizations stay competitive in a sustainable way in today's complex world of business? Directly associated with this question arises an additional, may be more important and profound, question: What can each human being do to transform himself or herself and grow in one's own context including both to achieve high performance and personal fulfillment?

In this book, you will find a powerful proposal addressing these questions that will allow you to understand a transformation theory in a clear, profound, and inspiring way. Also, you will learn the importance and practicality of the proposed approach from real-world examples of its application in diverse industries and countries.

The methodological rigor of such an approach is based on general systems theory, which understands both the person and the organization as open systems, that is, as a set of inter-related parts that receives, processes, and emits energy and information. As it is known, an open system works optimally and sustainably when the constituent elements are harmonically integrated; that is, they communicate and interrelate with each other exchanging energy and information with their environment in the interest of generating joint solutions.

Consequently, the fundamental objective of the proposed transformation process is to rearticulate the system in response to context changes, in order to generate a new connectivity among its elements that allow the greatest possible value creation. Connectivity is, in fact, a key concept of this transformation and a clear imperative of the modern world, where technology, human development, and the business world converge in the search for patterns that allow a greater

connection between people, systems, processes, companies, and even countries.

In this way, the book you hold in your hands has the fundamental merit of masterfully reconciling a profound philosophy of the meaning of human life with a practical way of creating value in the business sphere.

Given the universality of the aforementioned growth challenge, this book is aimed at anyone interested in the transformation process, from both a personal and professional point of view; thus it is relevant to business from all industries; to researchers and students from diverse disciplines from business management, psychology, and philosophy to technology and science; to executives and employees of all levels; and to business consultants. In brief, this book is valuable to everyone, regardless of their profession or occupation, who feels the need to grow and is interested in understanding the dynamics of personal and organizational transformation.

I met Alberto Pérez, the author of this book, almost 20 years ago when he invited me to share the possibility of transformation to Mexican companies in order to grow through the consulting approach now presented in his book. Since then, I have had the privilege of accompanying Alberto Pérez in perfecting and applying his proposed approach and method. For hours, we have discussed how to apply the method in specific cases to help our clients – in Mexico and other countries of Latin America – grow and transform themselves, with a consistent approach, within their own reality. Together we have also attempted to inspire our consultants and clients to make their dreams of becoming better human beings and growing personally and professionally a reality. As a result of the consulting projects that I have lead and implemented together with our team of consultants, I have been able to confirm the power of the Integrated Business Transformation that allows our consultants and

clients to enlarge their spirits and to reach more freedom by broadening their possibilities of choosing how to lead teams, relate to other people, and add value to clients, generating a differentiated experience.

I have no doubt that sharing this journey of the Integrated Business Transformation has allowed me to transform myself and grow through different cycles of my life, has given a transcendent meaning to my work as an entrepreneur and as a consultant, and, even more, has allowed me to generate new possibilities in my personal life.

To clearly and strongly share the consulting approach and method that we have applied, this book has two parts. Part I, “Consulting Approach,” comprises the philosophical and methodological foundation of the Integrated Business Transformation and it consists of three chapters.

In chapter “Alberto Pérez La Rotta: ‘My Life and My Philosophy,’” the author shares, from a deeply personal perspective, the origins and the most profound motivation for writing this book. For that reason, he narrates from his academic studies and business career – the intellectual influence that allowed him to build his thinking, which includes: books, professors, and learning during his graduate studies – to the key philosophies that support his proposed approach for transformation consulting.

Chapter “Integrated Business Transformation: Consulting Foundation and Approach” shows the conceptual basis of the consulting approach that we have applied during the last 30 years. A model that was developed from the synthesis of Alberto’s preparation, experience, and personal and consulting approach, which we have applied together in our business practice.

Chapter “How Do We Do It? Our Consulting Method” illustrates the Integrated Business Transformation consulting method and gives a practical guide for the transformation

process through key strategy questions. Therefore, in this book, the approach – the way to address the reality of the organization and its clients – differs from the method – the steps to follow in the transformation’s implementation.

Part II, “Success Stories – Integrated Business Transformation,” shows the application of the approach and method in five real-world business cases, that have had important results in different countries and industries: pharmaceutical, chemical, industrial equipment, and consumer products. These success stories have a dual intention: on the one hand, to demonstrate the approach’s effectiveness in the transformation of organizations by impacting the individuals through an integrated process; and, on the other, to go deeper into the presented conceptual model by understanding its practical implications in today’s business world.

I sincerely hope that you enjoy reading this great book and, like me, have the opportunity to discover the innumerable fields of application the ideas presented here have for mastery in your business, your work, and especially in your own life. I am confident that after reading this book, your perspective on the world will broaden. And you will discover a greater sense of fulfillment in everything you do, based on our powerful capacity as humans to bring or establish value exchange relationships with other human beings and with their context, with the intention of contributing to others and thus improving their own quality of life.

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September 29, 2016
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