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## AGILITY: How to Navigate the Unknown and Seize Opportunity in a World of Disruption

### Leo M. Tilman and General Charles Jacoby

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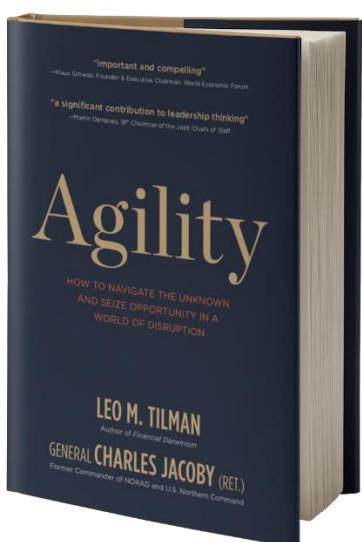
*"Agility is the most decisive factor in successfully navigating the Fourth Industrial Revolution and fulfilling its promise to humankind. In this important and compelling book, Tilman and Jacoby provide a comprehensive theory of agility and a practical guide to developing and leading agile organizations."*

— Klaus Schwab, Founder & Executive Chairman, World Economic Forum

*"Groundbreaking and timely! Succeed as a leader by using this book to create agile organizations that will thrive in a volatile and uncertain world."*

— Bill George, Past Chairman and CEO, Medtronic; Bestselling Author, *True North*

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In a world of accelerating disruption and staggering uncertainty, agile organizations that can assess and respond to change in real time gain an aggressive edge over competitors in the market. Agility has become a tenet of business success in the disruptive age—but most leaders still don't know what it truly means and are in need of specific guidance on what it takes to build organizations that are consistently agile.

In their comprehensive new book, **AGILITY: How to Navigate the Unknown and Seize Opportunity in a World of Disruption (Missionday; October 15, 2019)**, authors **Leo M. Tilman** and **General Charles Jacoby** provide a powerful approach to fostering agility and helping leaders better understand how to apply it to their organizations.

Tilman is a financier and leading authority on risk, strategy and finance, and General Jacoby is a retired four-star Commander of the North American Aerospace Defense Command (NORAD) and U.S. Northern Command. Together, they present a call to action for

leaders across public and private sectors that agility is urgently needed and that it is achievable for any organization. When organizations make the choice to become agile, adopt the agility mindset, and acquire the requisite knowledge and capabilities—all while remaining vigilant—agility becomes their enduring state of being.

Agility is far superior, and far more effective, than mere speed and adaptability. Organizations that adopt this mindset thrive amidst uncertainty and disruption, and are able to turn today's challenging environment into an advantage—one that supports their vision. In **AGILITY**, Tilman and Jacoby strive to create a theory of agility that comes alive as an operational doctrine and a leadership practice, supporting it with a wealth of examples, including:

- **Business:** Google, Goldman Sachs, IMAX, GM, Western Union, Facebook, Bear Stearns, Citigroup, and BlackRock;
- **Government:** FDR's “arsenal of democracy” and JFK's “man on the moon”;
- **Foreign affairs:** Putin's Russia and the Northern Ireland peace process;
- **Emergency management:** Fukushima nuclear disaster, Hurricanes Katrina and Sandy, the Ebola outbreak, and Columbia and Challenger space shuttle disasters;
- **Warfare:** The Battle of Normandy and the Vietnam, Iraq, and Napoleonic wars.

Using these crisp case studies, Tilman and Jacoby argue that in order to thrive in the years ahead, all organizations, both public and private, will need to make a concerted investment in the knowledge, capabilities, processes, and cultures that promote agility. Only then will they be positioned to change course quickly and effectively, seize new opportunities, and defend against potential threats.

In **AGILITY**, the authors explore:

- Why leaders have fundamentally misunderstood what it means to be agile—confusing it with other organizational traits such as adaptability, resilience, flexibility, and dynamism;
- A comprehensive definition of agility and a roadmap for fostering an agile mindset and culture throughout the organization;
- Why agility is a choice and a capacity that can be taught, learned, and consistently practiced;
- What tools, competencies, and leadership behaviors are needed to create an agile organization;
- The leadership behaviors that destroy cultures and agility, threatening the long-term survival of organizations;
- Why successful organizations don't simply adapt on the spot—they prepare and plan ahead.

Tilman and Jacoby walk us through some of the most compelling case studies—past and present—of agility, including:

- How **IMAX** transformed itself from a niche documentary film company into a major entertainment industry player by shaping a disruptive strategy, enacting the digital transformation, and capitalizing on their unique technological ability to create visually stunning experiences;
- How **BlackRock** became a dominant player in index investing by acquiring Barclays Global Investors;
- How **Western Union** mitigated existential threats and solidified its market position as a Fortune 500 company that operates in over 200 countries and has more retail agent locations than McDonald's and Starbucks combined;
- How the leading **American Fire Service** departments exemplify agility by proactively planning for emergencies and fostering risk intelligence, preparedness, decisiveness, and trust;

- How the **Invasion of Normandy** exemplifies both strategic and tactical agility, where purposefulness, decisiveness, and the will to win of soldiers and leaders changed the course of history as we know it.

Combining their personal experience of building and leading agile organizations, Tilman in the realm of business and finance and Jacoby in battlefield command and homeland security, **AGILITY** provides a much-needed framework for what “being an agile organization” means—and demonstrates how to recognize threats and opportunities, shape timely responses, and decisively execute every time. It will allow leaders and organizations to step confidently forward and dominate change instead of being dominated by it.

## **ABOUT THE AUTHORS**



**Leo M. Tilman** is a leading expert on risk, strategy, and finance and a long-time advisor to companies, governments, and institutional investors around the world. Prior to founding his namesake strategic advisory firm, Tilman held senior roles at BlackRock and Bear Stearns and taught finance at Columbia University, his graduate and undergraduate alma mater. He is the author of three earlier books, including *Financial Darwinism*. Tilman helped shape the modern concept of risk intelligence and, in collaboration with U.S. government, created innovative models for public/private partnerships. He has been profiled as a Business Visionary by *Forbes*.



**General Charles Jacoby (U.S. Army, Ret.)** is a military leader whose career in uniform culminated as four-star Commander of the North American Aerospace Defense Command (NORAD) and U.S. Northern Command. Having led at all levels in peace and war, Jacoby headed the federal military response to Hurricane Sandy and commanded the 135,000-member Multinational Corps during Operation Iraqi Freedom (2009-10). Previously, he served as the Director of Strategy, Plans, and Policy for the Joint Chiefs of Staff and as U.S. Military Representative to the UN. Jacoby is the Distinguished Chair of the Modern War Institute at the U.S. Military Academy at West Point, his undergraduate alma mater. He holds graduate degrees from the University of Michigan, the School of Advanced Military Studies, and the National War College.

## **AGILITY: How to Navigate the Unknown and Seize Opportunity in a World of Disruption**

**By Leo M. Tilman, General Charles Jacoby**

Missionday; October 15, 2019

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## **ADVANCE PRAISE FOR AGILITY**

“A significant contribution to leadership thinking at a time of increasing complexity, intense scrutiny, and rapid change. Recognizing agility as an essential driver of success in business, industry, and the military is vital. Understanding how to foster and consistently deliver it is even more critical. This must-read book helps us achieve both.”

– **Martin Dempsey, 18th Chairman of the Joint Chiefs of Staff**

“Successfully navigating change is an utmost priority for any leader. This deeply intelligent book examines the fundamental nature of agility and then provides an actionable roadmap to fostering it. It is an important read for anyone in any organization that strives for lasting relevance and an enduring brand.”

– **Shelly Lazarus, Chairman Emeritus, Ogilvy & Mather**

“All over the world – across different cultures and industries – agility is what differentiates successful teams and organizations and allows them to flourish long-term. All leaders would do well to absorb this brilliant book and put its ideas into practice.”

– **Patty McCord, Former Chief Talent Officer, Netflix; Author, *Powerful***

“Agility is a distinct advance in the understanding of organization and cooperation in businesses begun by Chester Barnard in *The Functions of the Executive* (1938) and continued in Friedrich Hayek’s discussion of the process by which knowledge is acquired (1945).”

– **Edmund Phelps, Nobel Laureate in Economics**

“In defending our nation and evolving its intelligence infrastructure, agility is everything. This original book will guide leaders and organizations in braving the unknown, leveraging change, and exploiting risk.”

– **Keith Alexander, 16th Director of the National Security Agency**

“The future belongs to agile organizations. With a rare clarity of thought and a wealth of experience, Tilman and Jacoby have given us an invaluable roadmap to how such organizations can be built and nurtured for the long-term.”

– **Senator George Mitchell, Former U.S. Senate Majority Leader & Peace Envoy**

“In business, government, and warfare, agility is critical to survival, competitiveness, and enduring success. This original and practical book is a must-read for the leaders of organizations and teams who want to really understand what it means and what it takes to be agile.”

– **John Abizaid, U.S. Ambassador to Saudi Arabia and Fellow of the Hoover Institution at Stanford University**

“All leaders are facing an era of rapid change. That’s true across politics, the military, all areas of business and every geography. We are all asking ourselves how we can lead successfully as we deal with fast-moving events, ambiguity, uncertainty and volatility. Tilman and General Jacoby skillfully present clear and reasoned strategies for anyone interested in learning and applying organizational agility to get ahead and prosper in this age of disruption.”

– **Doug Peterson, President and CEO, S&P Global**

**A Q&A with the authors of AGILITY**  
**Leo M. Tilman and General Charles Jacoby**  
**(Missionday; October 15, 2019)**

**How do you define agility?**

We define agility as the organizational capacity to effectively detect, assess and respond to environmental changes in ways that are purposeful, decisive and grounded in the will to win.

**You have defined what agility *is*. Can you talk a little about what it is *not*? Why is this a vital distinction and why has the term “agility” been so widely misunderstood until now?**

First and foremost, the term “agility,” while widely used in business, the military, and increasingly in other domains (such as government, education, healthcare, and NGOs) has not had a formal definition until now. The term has been confused with a variety of other competencies—like adaptability, flexibility, dynamism, resilience, or a proclivity to innovate. Further, these terms are often used interchangeably. For example, armed forces around the world tend to use the term agility as a synonym for “flexibility” and “maneuverability.” In business, a recent publication by a leading advisory firm—a thought leader on strategy and management—described agility simultaneously as dynamism, flexibility, speed, nimbleness, responsiveness as well as the organizational ability to renew itself.

The absence of a cogent understanding of what it takes to cultivate an agile organization can lead to generic prescriptions, such as an indiscriminate flattening of organizations. Those can be not only ineffective but outright damaging. The approach to fostering agility we introduce in this book fills the gap by providing a comprehensive intellectual framework as well as an operational roadmap. The objective is to enable all organizations to quickly recognize threats and opportunities, shape timely responses, decisively execute, and do so consistently as environments change.

Another major issue has been a belief (not uncommon among executives, athletes, and others) that agility is inborn. You either have it or you don’t. We argue that agility can be learned, practiced, and utilized to succeed. It *is* consistently achievable.

**Why did you write AGILITY?**

Senior leaders involved in the complex global economic environment—with its rapid pace of change, unexpected disruptions and cascading second- and third-order effects—have the same challenges as top military commanders. They know their organizations have to change and become more agile, but they don’t know precisely what agility means or how to achieve it. So, we decided to create a comprehensive theory of agility and then make it come alive as an operational doctrine and leadership practice. This involved defining agility, explaining how it’s different from other competencies, and deconstructing it into parts that can be deliberately developed and put into practice.

**Why is agility urgently needed now?**

In the midst of the Fourth Industrial Revolution, the world is changing rapidly. And it will only become more challenging over time as the pace of technological change accelerates and leaders face geopolitical and societal instability, terrorism, and climate change. Productively responding to change, exploiting uncertainty, capturing fleeting opportunities and dominating change (instead of being dominated by it) will require agility. We make this intellectually clear and operationally actionable.

## **How can leaders begin to cultivate an agile mindset throughout their organizations?**

Agility is a choice followed by action and hard work. It requires specific experience, understanding, and commitment. It demands engagement across the organization as well as a concerted investment in people and processes. Adopting the agility mindset allows organizations to thrive since it provides a new way of studying environments, making decisions, evaluating threats and opportunities, building cultures and relationships, defining True North (strategic and moral), and decisively executing. First, leaders must fully understand and embrace what agility *means*. Then they and their subordinates must be trained. It is through that shared understanding, training, and practice that the agility mindset is created.

## **What are a few leadership behaviors that destroy organizations by making them less agile?**

When leaders do not practice what they preach, they destroy the morale, loyalty, and engagement throughout the organization. Other failures of leadership incompatible with agility include micromanagement, indecisiveness, suppression of truth and dissent, excessive optimism, arrogance, and a failure to instill accountability and trust throughout an organization.

## **What is the role of risk in agility? And why do leaders need to be savvy about today's risks?**

Every organization today may abruptly find itself heading toward an environmental shift that poses an existential threat, a transformational opportunity, or both. The disruption across all domains is already staggering, and it's picking up speed. In this whirlwind of change, we're monitoring the developments we've deemed relevant. But are we focusing our attention on the right targets? Are we scanning the horizon broadly and vigilantly enough? Are we committing enough resources and taking vigorous enough action?

This is where risk comes into play. Risk intelligence is one of the three pillars of agility. It is crucial for leaders to develop an understanding of the major trends and factors that impact their environment. By recognizing and managing their portfolio of risks on an ongoing basis and aligning those with goals and resources, leaders can assess and respond to changes, whether presented with a threat or an opportunity. We believe that leaders and whole organizations must become risk intelligent and agile in their approach. By developing ways to understand risks and uncertainties and proactively manage them, they are more likely to succeed.

## **What is the difference between risk management and risk intelligence and why does it matter?**

Risk management is now a fully-developed rich scientific discipline. Yet its traditional role is to police and react; to mitigate threats, not capture opportunities. Thus, leaders often see risk management as compliance function or, worse yet, as an obstacle to making bold decisions. In contrast, risk intelligence is a proactive, practically useful corporate competence; it is a strategic, forward-looking reincarnation of risk management.

We define risk intelligence as the organizational ability to think holistically about risk and uncertainty, speak a common language and effectively use forward-looking risk concepts and tools in making better decisions, alleviating threats, capitalizing on opportunities and creating lasting value.

## **You suggest that leaders must plan for agility, which seems counterintuitive. Can you elaborate on this?**

Many leaders can readily attest that a carefully crafted and detailed plan may inhibit agility, even when it is executed skillfully.

But as General Dwight Eisenhower famously observed, “plans are worthless, but planning is everything.” It is not the existence of formal plans, but the *act* and the *method* of planning that enable agility. Being agile requires preparation and planning to make sure that a strategy is explicitly designed to operationalize the vision and priorities of the organization. A strategy is useless without a planning process that accounts not only for a baseline scenario but also for *what if* and *what next* contingencies that prepare us for the inevitable environmental changes that often upend the most brilliant of plans.

The importance of planning lies not in fashioning a sure path to success, but in setting a clear direction, analyzing a wide range of potential scenarios and routes to the goal, and empowering the organization with the necessary intelligence, execution capabilities and boundaries of initiative to monitor, assess and make adjustments as the plan is developed and put in action.

### **What is your perspective on the role of technology and artificial intelligence in the future of leadership?**

AI is posed to introduce dramatic environmental changes; it already has in some ways. The areas that will surely be affected include medical diagnostics, professional services, military and business intelligence, and institutional investing among many others. However, the exact path of AI and the timing and magnitude of its impacts are not only unknown; they are unknowable. Some of these impacts are risks but some are uncertainties – and those must be appropriately separated and proactively managed.

At the same time, AI will *not* become a substitute for the human knowledge, creativity, ability to make hard decisions under uncertainty, and persevere under the most dire of circumstances—and any attempts to use AI in this fashion are not only likely to be ineffective but outright dangerous.

There is no substitute for the special brand of leadership and the culture conducive to agility—and no technology can replace that. At the same time, AI and new advanced technologies can be invaluable in conducting the fight for risk intelligence and analyzing environmental signals and potential solutions. However, it will always remain the essential role of any leader to make decisions in the midst of uncertainty and based on incomplete—and sometimes flawed—information, and decisively lead organizations in braving the unknown.

### **Why must we abandon prediction and rigid strategies for risk intelligence and agility?**

Yogi Barra said it best: “It’s hard to make predictions, especially about the future.” As humans, we have a terrible track record in predicting the future—because the future is unknowable. Agile organizations abandon prediction for detection and planning. Fighting for risk intelligence and understanding your portfolio of risks are important parts of that. Leaders must learn to detect and eliminate predictions that may lead to rigid strategies and anti-agile behaviors.

### **Many in business have rejected the “command-and-control” style of leadership, but you argue that it is absolutely central to fostering agility. Why do you advocate so strongly for it?**

Many executives and consultants confuse an effective command-and control philosophy and practice with micromanagement. We describe a command-and-control doctrine (adapted from the US military’s doctrine of Mission Command) that is specifically designed to foster agility. Its goal is to seamlessly meld centralized vision and planning with decentralized empowered execution. This means that senior leaders must attend to senior leader business (vision, planning, directing, creating the culture) and empower others to exercise initiative and take smart risks in getting the mission, task, or strategy accomplished. This makes people feel valued and engaged. Thus, the strategy is executed in a disciplined fashion—while harnessing the talents and ingenuity of the entire organization.

**Radical flattening of organizations is a fashionable recipe for dealing with accelerating change and uncertainty. What are your thoughts on this trend?**

In many cases, flattening an organization is bound to fail. We subscribe to the idea that in any organization, the nature of its portfolio of risk must play a major role in the organizational design. More centralization and coordination are required if different parts of the organization take interconnected risks. Less centralization is required if they take unrelated risks. Hence, if you try to flatten an organization that takes interconnected risks, it's a recipe for disaster.

**How do the concepts surrounding agility directly apply to the world of finance?**

Risk intelligence and agility are critical to investing and finance. Both simultaneously apply to organizations and investment processes, making this book relevant to institutional investors and financial institutions on multiple levels. In addition to the role of risk intelligence in detecting and assessing change, some of the most powerful levers of agility are financial tools: M&A, rebalancing of assets and liabilities, hedging, and a myriad of other strategic and financial transactions.

**How can leaders make sure their plans for agility are executed effectively?**

Defining what success means is an integral part of agility, which, by our definition, is grounded in “the will to win.”

For not-for-profit and government entities, winning may encompass mission-driven goals, public policy success, societal or environmental impact, or influence. In business, winning must reflect not only near-term financial performance and competitive superiority but also an enduring relevance to all stakeholders: customers, shareholders, business partners, employees, communities and society at large. If the concept of winning is grounded in short-termism or disproportionately favors some stakeholder groups at the expense of others, agility is undermined, internal and external trust is eroded, and organizations become exposed to existential risks.

Thus, winning must be comprehensively defined and appropriate measures of success created. From that point on, it all must become a part of the agility process, with constant reevaluations of the environment. Analytical tools and performance metrics are adjusted to reflect progress, new developments and a sense of whether the organization is achieving the mission and measuring the right things in the right way.

**More investors are evaluating companies based on ESG (Environmental, Social, and Governance) criteria. How can agility foster ESG in organizations? And why is this important to leaders?**

Every organization must explicitly define what “winning” means to them, including how they will balance the interests of different stakeholder groups. We provide a framework—Operationalized Strategic Vision (OSV)—that allows leaders to formalize and operationalize the most fundamental aspects of their strategy and operating philosophy. By explaining to employees how the organization creates lasting value for various stakeholders – including the environment and society—and how strategic and tactical decisions must be made, leaders ensure that fundamental elements of ESG become a lasting part of the organization’s shared understanding, behavioral norms, metrics, and incentives.

**What do you hope readers will take away from your book?**

First, we would like readers to embrace the fact that agility is a choice and that it is achievable. It can be taught, learned and consistently practiced via methodical inquiry, preparation and planning. With a purposeful and disciplined approach, agility can become a *mindset*, a way of thinking that determines how

we study environments and how we operate on a day-to-day basis. Over time, agility can become an enduring *state of being*.

Second, leadership, culture, and morality are paramount. No physical capabilities, knowledge or special talents can compensate for the lack of courage to make hard decisions or for the mistrust that undermines our ability to act as a cohesive team.

Finally, everyone in the organization—up and down the hierarchy and out to very edges—must understand the strategy, their role in it, and importantly, their boundaries of disciplined initiative. They must also feel empowered and accountable and trust their leaders and colleagues.