

An aerial photograph of a university campus during autumn. The trees are in various shades of orange, yellow, and brown. A large, modern building with a glass facade is visible in the center. The sky is a clear, pale blue.

Offensive Moves:

Adapting and Coordinating in a Complex Institution

UBC Summer Knowledge Share 2026
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UNIVERSITY
BUSINESS
CONSULTING
George Mason University®

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What is UBC?

University Business Consulting (UBC) is an internal George Mason University unit of trusted advisors focused on innovation, turning data into insights, and improving operational efficiencies, all in pursuit of the university's overarching strategic goals.

Using our **experience in higher education, project management, analytics, and strategic planning**, we work alongside our George Mason clients to devise solutions that **support them in reaching their goals** across the university.

UBC is located within the Office of the President.

<https://consulting.gmu.edu/>

TODAY'S PURPOSE:

Build your offensive playbook for getting work done.

Most teams are **strong on defense** – keeping operations running under pressure. But steady operations alone don't move the mission forward; progress also comes from **creating new value**. George Mason's Strategic Direction is explicit that we advance the mission by being willing to take risks, not avoiding them.

This session gives faculty and staff a few repeatable offensive moves: setting projects up to win, facilitating teams that deliver, and pursuing new value as well as a simple way to decide when to play offense vs. defense, scaled to real capacity.

By the end of today, you will be able to:

- 1** **Set projects up to win** by aligning stakeholders and decision rights and applying answers (scope, non-scope, governance, and success measures) to a real effort.
- 2** **Facilitate** teams that deliver by creating alignment, maintaining focus on objectives, and guiding groups toward decisions and measurable outcomes.
- 3** **Pursue new value** through small experiments – test an idea before betting big on it.

Recap: What is a Defensive Fundamentals Playbook?

A **Defensive Fundamentals Playbook** is a practical collection of tools, templates, and habits you can use when work feels busy, unclear, or reactive.

What to include:

- A go-to **prioritization** method
- **Role clarity** tools for your context
- Checklists or templates for **recurring** work
- **Shortcuts** for common decisions

What your playbook should be:

- **Personal:** Tailored to YOU and YOUR work right now
- **Practical:** Easy to reference
- **Simple:** Short, usable, and focused
- **Accessible:** Stored where you already work

Recap: Your Defensive Playbook

1



Triage & Prioritize

You learned about how to **decide** what to work on when everything feels urgent.

2



Operational Clarity

You learned about how to **clarify** roles, ownership, and decision-making.

3



Build Repeatable Processes & Systems

You learned about how to **reduce** rework and make recurring work easier.

4



Continuous Improvement

You learned about how to **keep** your playbook useful over time.

Continue to iterate in all sections and use tools, such as AI, throughout the process

Offensive Moves

Why Offense, and Why Now?

Defense · Session 1

Protect the core — do today's work better, faster, safer.

Triage & Prioritize

Operational Clarity

Repeatable Processes & Systems

Continuous Improvement



*Builds
Towards*

Offense · This Session

Setting teams up to deliver and grow value.

Set Projects Up to Win

Facilitate Teams That Deliver

Pursue New Value

Quick Discussion — Offense or Defense?

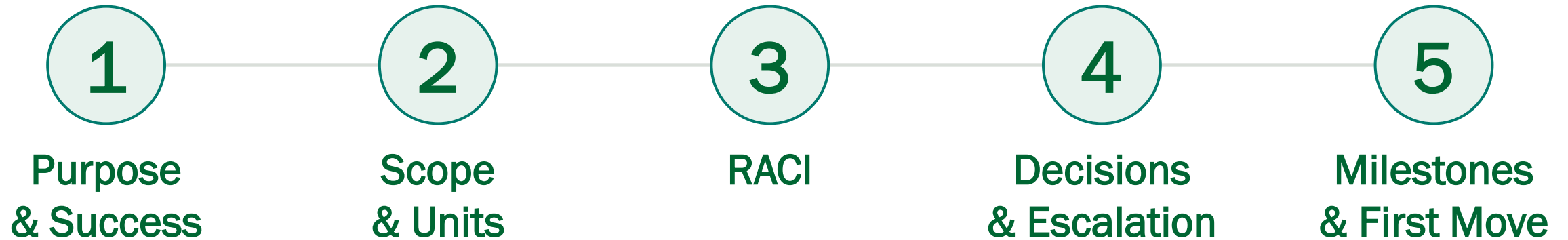
Standardizing a weekly report · **Piloting a new orientation format** · Fixing a recurring data error

Most work needs both. The difficulty is matching the play to the moment.

Move 1: Set Projects Up to Win

Set Projects Up to Win

Align purpose, scope, roles, decisions, and first moves before launch.



Cross-Unit Projects Raise the Stakes

A well-run cross-unit project is how an offensive bet actually gets delivered.

More Work Crosses Unit Lines

 **Cross-college initiatives**
Shared curricula,
joint recruiting

 **Shared services**
HR, finance, and
IT platform
rollouts

 **Task Forces**
Policy, compliance,
and operating
model work

 **Redesigns**
Processes that
touch several
offices at once



Why Setup Matters More Here

 **No single boss**
Authority is
distributed across
units

 **Competing priorities**
Each unit optimizes
for its own goals

 **Multiple sign-offs**
Decisions move
slowly by default

 **Outside dependencies**
Another unit's
calendar becomes
your timeline

The more work crosses boundaries, the more the setup has to be explicit before the work begins.

Five Questions to Set Up a Cross-Unit Project

Answer these before you start on project work.

1

Purpose & Success

Why this project?
How will we know it worked?

2

Scope & Units

What is in, what is out,
and who is involved?

3

RACI

Who owns the work
and decisions?

4

Decisions & Escalation

How will decisions get
made and unstuck?

5

Milestones & First Move

What happens first?
What could slow us down?

The answers to these questions will help you form your setup, approach, and high-level project plan.

Q1 – Purpose & Success

Why this project, and how will we know it worked?

1 SETUP QUESTION	What to capture	Cross-unit angle	Example
	One-liner objective plus 1–2 measurable success criteria every unit signs up to.	Each unit may arrive with its own definition of success. Reconcile the definition now, not at launch.	Admissions hears “faster yield,” Registrar hears “fewer errors,” IT hears “fewer tickets.” Shared win: onboarding in one sitting with 30% fewer tickets.

This answer becomes part of your approach.

Objective

Success Measures

Pitfall to avoid: A vague objective like “improve onboarding” that each unit reads differently.

Q2 – Scope & Units

What's in scope, what's out, and which units are involved?

2
SETUP
QUESTION

What to capture

In-scope, out-of-scope, and a named list of units with what each owns.

Cross-unit angle

Out-of-scope protects everyone.
Without it, each unit may add its wish list and stretch the project.

Example

In-Scope = new undergrad onboarding flow.
Out-of-Scope = graduate onboarding and CRM replacement.
Units: Admissions, Registrar, IT, Advising.

This answer becomes part of your approach.

Scope

Out-of-Scope

Units

Pitfall to avoid: The open-ended “while we’re at it...” where every unit adds on its wish list.

Q3 — RACI

Who's Responsible, Accountable, Consulted, and Informed?

3
SETUP
QUESTION

What to capture

A quick RACI with one accountable owner plus each unit's decision-maker.

Cross-unit angle

The classic failure is every unit assuming another unit owns the work.

Example

Accountable = Onboarding lead.
Responsible = IT build + Registrar data.
Consulted = Advising.
Informed = College deans.

This answer becomes part of your approach.

Roles

Decision Rights

Pitfall to avoid: Two co-owners or a unit that is really Responsible but is only kept Informed.

Q4 – Decisions & Escalations

How will decisions get made and escalated?

4
**SETUP
QUESTION**

What to capture

Name the sponsor, decision path, decision speed, and how disagreements escalate.

Cross-unit angle

These projects stall on decisions no single person can make alone.
Agree on the path for resolution.

Example

Working decisions by lead.
Cross-unit trade-offs go to sponsor within 3 business days.
Disputes go to sponsor, not next monthly meeting.

This answer becomes part of your approach.

Governance

Escalation

Pitfall to avoid: Every decision waits for a monthly steering meeting, and momentum dies.

Q5 – Milestones & First Move

What are the milestones, dependencies, and first move?

5
SETUP
QUESTION

What to capture

A few key milestones, cross-unit dependencies and risks, and the first concrete step.

Cross-unit angle

Your timeline is only as fast as the slowest unit you depend on. Surface that now.

Example

Milestone 1 = data-sharing agreement.
Risk = IT's project queue.
First move = by Friday, confirm IT capacity for Q3.

This answer becomes part of your approach.

Milestones

First Move

Pitfall to avoid: A plan that ignores another unit's calendar e.g., requesting changes during registration.

Five Questions, One Project Approach

Your five answers becomes your approach and high-level plan.

Question	Project Approach & Plan
Q1 · Purpose & Success	Objective and success measure
Q2 · Scope & Units	Scope, out-of-scope, and units involved
Q3 · RACI	Roles and decision rights
Q4 · Decisions & Escalation	Governance and escalation path
Q5 · Milestones & First Move	Timeline and first move

One page, five answers — any unit can see how the project is set up.

Reflecting on a New Skill

Think about a cross-unit project you're leading or about to start.

Shared Objective

Could every unit state the objective and success measure the same way?

Decision Path

Where could a decision stall, and who breaks the tie?

Answer 5Qs

Align before launch

Purpose • Scope • Roles
Decisions • First Move

One Owner

Is there one accountable owner or does everyone assume someone else has it?

Outside Dependency

What's the one dependency outside your control that could slow you down?

Pick one project. Answer the five questions. Confirm the first move.

Cross-unit projects don't fail at launch. They fail at setup.

Move 2: Facilitate Teams that Deliver

Adapting the Offense Play

Organizations increasingly rely on groups to move work forward, making **effective facilitation** a critical capability.

Increased Work Occurring In Groups

- **Meetings:** Weekly standups, planning sessions
- **Committees:** policy groups
- **Project Teams:** New system rollouts, process redesigns
- **Cross-department collaboration:** student success initiatives

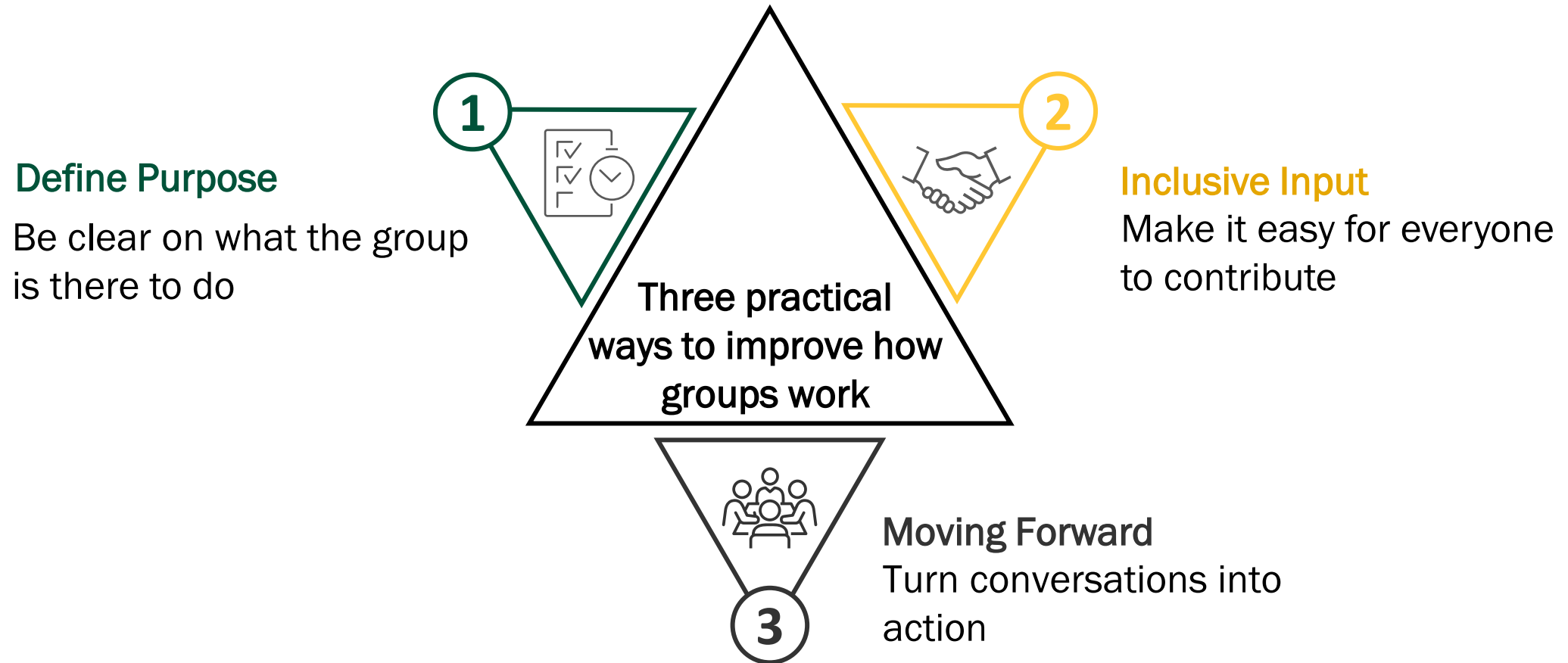
Facilitating Through Shockwaves

When the environments shift (e.g., external factors, budget changes, AI usage, etc.), groups need to:

- **Make faster decisions** with less certainty
- **Coordinate** across more boundaries
- **Pivot** based on what they learn

Three Facilitation Shifts

Simple shifts - but they have an **impact** on team effectiveness.



1



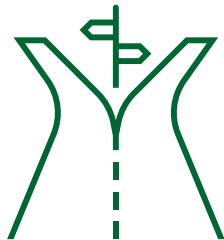
Shift 1: Define Purpose

Groups often move through these stages, but **confusion occurs** when members have different expectations about a meeting's purpose.



Generate

Brainstorm and
create ideas



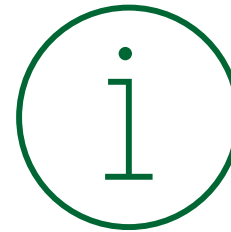
Decide

Choose a
direction



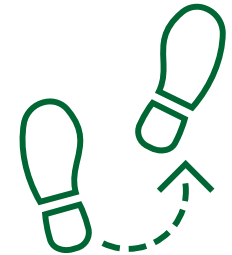
Align

Agree on roles and
responsibilities



Inform

Build shared
understanding



Act

Coordinate next
steps

1



Shift 1: Before and After

Scenario: A cross-functional team has been asked to support the development and implementation of a new student success initiative.

GENERATE

"By the end of this meeting, we will generate at least five new ideas to improve first-year student retention."

DECIDE

"By the end of this meeting, we will select one of the three proposed student success pilots to launch this fall."

ALIGN

"By the end of this meeting, we will agree on each department's role and responsibilities for implementing the student success initiative."

INFORM

"By the end of this meeting, all participants will understand the goals, timeline, and expected impacts of the student success initiative."

ACT

"By the end of this meeting, we will assign owners, confirm deadlines, and establish next steps for launching the initiative."

2



Shift 2: Inclusive Input

Groups often fail to capture **the full expertise, perspectives, and ideas** available in the room.



Think

Participants spend one to two minutes reflecting individually and developing their own ideas



Share

Each participant contributes a brief insight, perspective, or question



Group

The team identifies themes, connections, points of agreement, and areas requiring further discussion

Strong facilitators create opportunities for individual reflection, broad participation, and collective sense-making to ensure the group's expertise informs the discussion

2



Shift 2: Two Quick Techniques

Technique 1: Don't start with open discussion

- Give 1-2 minutes to think or write first
- Or send a pre-read so people arrive ready

Technique 2: Use structure to hear from everyone

- Go around the room (1 idea each)
- Or use sticky notes, virtual chats, and digital tools like whiteboards for parallel input





3

Shift 3: Moving Forward

Successful facilitation is about **translating conversations** into progress.

Before the meeting ends, clarify:

- What did we decide?
- What are the next steps?
- Who owns each step?
- By when?

Common Pitfalls	Facilitated Improvement
“We’ll circle back”	“Sarah will draft the first version by next Friday”
“Let’s keep working on this”	“We’ll reconvene after IT and Registrar review-target May 2 nd ”



3

Shift 3: Decision-Making Readiness

When a group is not ready to decide, the objective should be to **identify what is needed** to move forward.

Assess Readiness

Determine what is still missing:

- Critical information needed to evaluate options?
- Perspectives or stakeholders not yet represented?
- Clarity on risks, tradeoffs, or implications?
- Time for additional analysis or discussion?

Create a Path Forward

If the group is not ready to decide, leave with clear accountability:

- Assign an owner to gather the missing information
- Define what is needed to support a future decision
- Establish a timeline for follow-up
- Schedule when the decision will be revisited

Reflecting on a New Skill

Take a minute to think about an upcoming meeting or team conversation you're involved in:

- What is the specific job of that conversation?
- How will you structure participation so more voices are included?
- What will you do to ensure it ends with clear next steps and ownership?
- How will you approach situations when information is missing to make decisions?



When the path is clear, you can execute. When it's not, how you bring people together **IS** the work.

Move 3: Pursue New Value

The Challenge

New solutions or new stakeholders might benefit from new problem-solving tools.

Problems to solve are a-plenty! But you might try different approaches to some that are more unknown. This creates new value through new solutions or serving new stakeholders.



**KNOWN
UNKNOWNNS**
search, sort, and solve

Analytical Thinking

Planning
Logical/rational
Proving what's best
Pursuit of control and stability



**UNKNOWN
UNKNOWNNS**
innovation

Experimentation

Design Thinking
Human/emotional
Iterating towards better
Pursuit of novelty

"Students are so hard to reach and don't read email, what else can we try?"

"What will the University Library look like in 10 years?"

"The President mentioned AI in the shock waves in his Town Hall. What are some ways we should use AI?"

"Enrollment is falling in our college. What should we do?"

3 Tools to Use When Creating the “New”

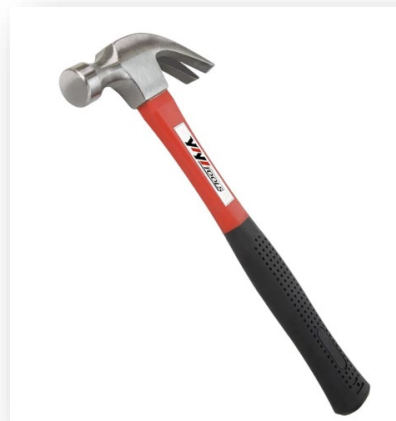


Tool #1: Jobs To Be Done

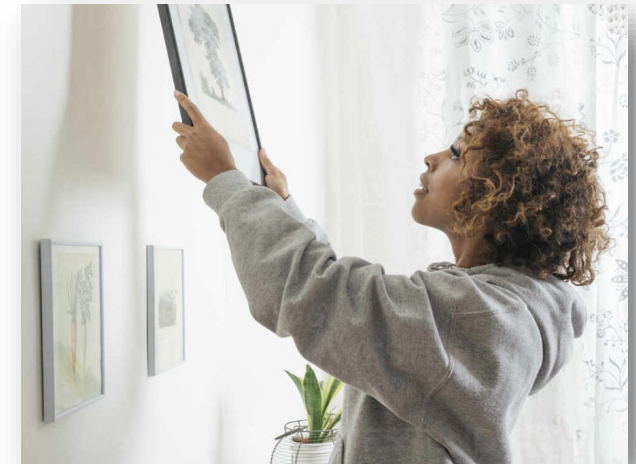
What is it?



Professor who coined this term and theory



No one wants to own or buy a hammer



They are using it to get a job done. For example, making a house feel more like a home by hanging pictures.

What is your job-to-be-done for being here?

Tool #1: Jobs To Be Done (cont'd)

What does it help you do?

Creating new solutions starts with really understanding the **problem of those you're serving**.

JTBD (jobs to be done) helps you stay focused on those needs, rather than the solution itself.

Seeing the person you're serving through their JTBD is a helpful reframe for unlocking new possibilities.

How do you write one?

Verb + Object of Action



I want to tackle

decisions one step at a time



I need to feel
in control

when making financial and health decisions

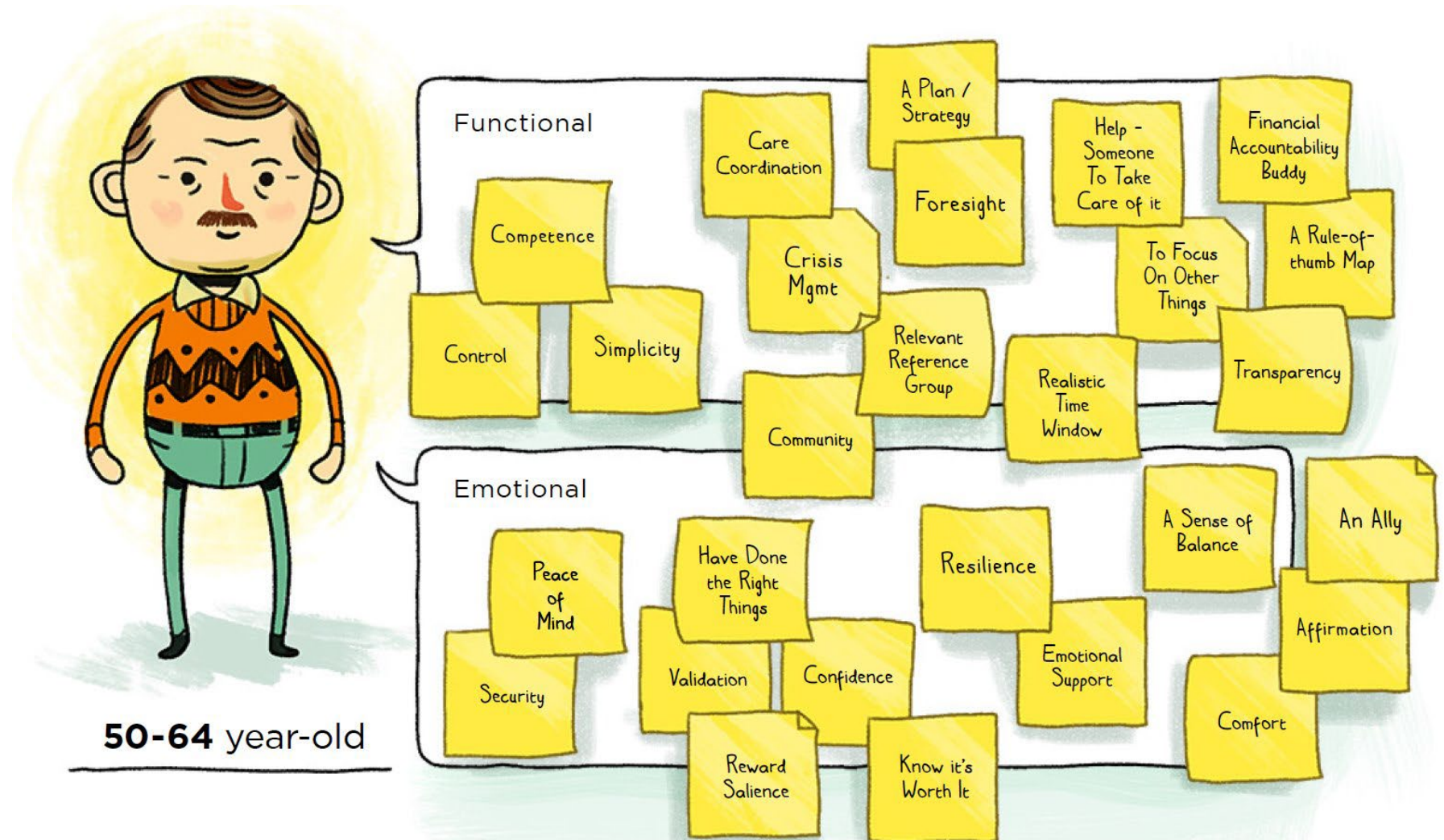


AI Tip: Ask AI to generate a list of JTBD!

Tool #1: Jobs To Be Done (cont'd)

Example

Baby boomers
and retirement
planning



Tool #2: Value Proposition

What is it?

A simple frame to concisely lay out a new idea for a program, process, solution.

The simplicity keeps the focus on the **key areas**, helping serve as a tool for brainstorming, processing, and aligning as a team.



Stakeholder(s)

For

User Characteristics

who is trying to

Needs

but can't because

Pain points / challenges



Concept

We will offer

Concept Overview

that provides

Key Benefits + Features

uniquely

What change is required

Tool #2: Value Proposition (cont'd)

An alternative template and name

Concept Snapshot

Concept Snapshot

Concept Name _____

	User 1	User 2
For (target user)		
Who want (unmet needs)		
We will offer (offering)		
That provides (benefits)		
Uniquely (differentiation)		



Tip: Tweak the language or add rows as needed!

Tool #2: Value Proposition (cont'd)

What does it help you do?

1

Concisely lay out an idea.

4

Serves as a tool for brainstorming, processing, and aligning as a team.

2

Keeps the person you're solving for front and center.

5

Helps identify assumptions embedded in the idea. This is critical to help you test the new idea by running an experiment!

3

Keep the problem and solution attached (human-centered).

6

Keeps team from falling in love with it – the more time we spend turning an idea into a deck or a document, the more we fall in love with it (sunk cost) and others think “wow this team really feels confident in this idea.”



AI Tip: use AI to brainstorm ideas off the Jobs To Be Done!

Tool #3: Test Card

What is it?

Test Cards are a way to outline a test to run on your new idea.

Running experiments prior to a small **pilot** (or just building or launching the new idea) **de-risks the potential solution** by iterating and learning about it before spending a lot of time and money on it.

Invest in de-risking > Invest in an idea

Test Card Strategyzer

Test Name: _____ Deadline: _____

Assigned to: _____ Duration: _____

STEP 1: HYPOTHESIS
We believe that _____
Critical: ⚠ ⚠ ⚠

STEP 2: TEST
To verify that, we will _____
Test Cost: _____ Data Reliability: 🍌 🍌 🍌

STEP 3: METRIC
And measure _____
Time Required: ⌚ ⌚ ⌚

STEP 4: CRITERIA
We are right if _____

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Tool #3: Test Card (cont'd)

How do you use it?

Fill out the Test Card the best you can. Don't worry about getting it perfect; just having the mentality that it's a test sets you better up for success for learning and iterating.

Treating your potential solution as a hypothesis to test helps you listen to disconfirming data during the test

What's the cheapest, fastest test to run?

What data do you want to collect so you can determine if it's an idea worth continuing to stand up?

What threshold do you want/need to hit in this early test?



AI Tip: use AI to brainstorm ideas for ways to measure

Test Card

Strategyzer

Test Name	Deadline
Assigned to	Duration

STEP 1: HYPOTHESIS

We believe that

Critical:

STEP 2: TEST

To verify that, we will

Test Cost: Data Reliability:

STEP 3: METRIC

And measure

Time Required:

STEP 4: CRITERIA

We are right if

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Tool #3: Test Card (cont'd)

An example

UBC had an idea to offer office hours. The idea came from people wanting to pick our brains but not needing a full project.

Instead of launching the idea, we ran a test (experiment).

What was different:

- We saved time by not doing a full launch/marketing
- We spent no money and little time and listened for signals
- We didn't do a survey; we used behavioral data

What we learned:

- People did want to have an avenue to just talk, but we didn't need to formalize it on the front end, but rather think about it on the back end

Test Card

Test Name <i>UBC office hours</i>	Deadline
Assigned to	Duration

STEP 1: HYPOTHESIS

We believe that

Office hours will serve a need for folks who don't want/need a full project

Critical:

STEP 2: TEST

To verify that, we will

Put a link on our website to sign up and mention it in passing

Test Cost:

Data Reliability:

STEP 3: METRIC

And measure

- *Number of signups*
- *Reactions to the idea of office hours*

Time Required:

STEP 4: CRITERIA

We are right if

There is proactive engagement with office hours sign up and positive response to the idea

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Reflecting on a New Skill



Are you working on a new problem or a new solution? Which one of these tools might you try to see if they unlock a new way of thinking?

Tool #1: Jobs To Be Done

Jobs To Be Done helps teams stay focused on the needs of those you're serving, rather than the solution itself.

Tool #2: Value Proposition

A Value Proposition template is a simple frame to concisely lay out a new idea for a program, process, solution to help with brainstorming, processing, and aligning as a team.

Tool #3: Test Card

Test Cards help outline a test to run on your new idea *before* you build it so you can de-risk the potential solution.

Recap

Recap: Your Offensive Playbook

You're equipped with **three repeatable moves** you can use in the next few weeks.

1

Set Projects Up to Win

You learned how to **align** purpose, scope, roles, and decisions before you start.

5 Q Set-up Checklist

Project Approach

2

Facilitate Teams that Deliver

You learned how to give every meeting a **purpose** and end with clear owners and dates.

Meeting Purpose Checklist

Input Techniques

3

Pursue New Value

You learned how to **test** one small, reversible experiment before betting big.

Jobs to Be Done

Value Proposition

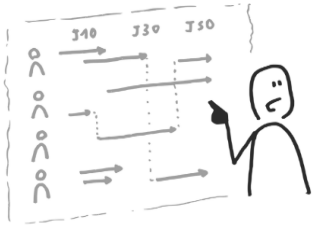
Test Card

Defense keeps you steady. Offense moves you forward.



UBC 2026 Summer Series

The summer 2026 series, **Winning this Season: Building Your Personal Playbook for Stewardship, Strategy, and Leadership in Uncertain Times**, positions attendees as intentional and empowered stewards of resources, people, and change – balancing operational discipline (defense), strategic adaptation (offense), and human-centered leadership (coaching).



Defensive Fundamentals – Operating With Clarity in Constrained Times

Tuesday, June 9 | 12 – 1 PM

Primary Focus: How units can stabilize operations and reduce friction when resources are constrained.

[Recording here.](#)

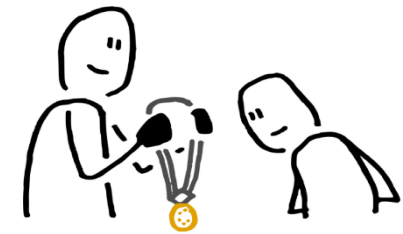


Offensive Moves – Adapting and Coordinating in a Complex Institution

Wednesday, July 8 | 12 – 1 PM

Primary Focus: Helping faculty and staff collaborate effectively across units while aligning to institutional priorities and external shocks.

[Register here.](#)



Coaching Your Team – Accountability, Well-Being, and Communication

Tuesday, August 11 | 12 – 1 PM

Primary Focus: Equipping supervisors, project leads, and informal leaders to support people amid sustained change.

[Register here.](#)

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