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"Unleashed – How to Thrive as an Independent Professional"

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**MARNI FECHTER ON GO AND SEES**

EPISODE 105

- Will Bachman: Hello, Marni. Thank you so much for joining.
- Marni Fechter: Thanks. I'm really happy to join and excited to speak with you.
- Will Bachman: Marni, we are going to talk today about Go & Sees. I was really fascinated to hear about your work. You've been organizing Go & Sees for a number of years. Start us off. What is a Go & See?
- Marni Fechter: Basically, a Go & See is taking people to actually go and see something. That could be a client going to see the work that you've done or an organization has done with a specific company to learn from their best practices. You can take funders who are funding a program in let's say the developing world to go and see what they're developing. You could take people within an organization to go and see an area of an organization that has been through a transformation that you're planning to bring to that business group.
- It's basically experiential learning and getting people away from a conference room and a bunch of PowerPoint slides to actually get their hands dirty a little bit and talk to people at all levels of an organization and learn about the transformational work that has brought them to the success that they're seeing at the moment that you can learn from.
- Will Bachman: I can see a few reasons to do this. One, for bringing funders to go see the work that a nonprofit is doing will be to make the funders happy that their money is being well-spent. I can imagine a situation where you ... A consultant would take some prospective clients to go see the work that's being done or has been done by that same consultant in the past. Validate it like a massive in person reference check. Talk to me about are those the main reasons? Are there any other reasons of doing this?
- Marni Fechter: Yeah, those are the two biggest reasons. For people to learn, to support client development and to reinforce philanthropy I would say would be the big three reasons to participate in a Go & See. When I was at McKinsey & Company, what I basically did was run the Go & See Programs, which were global, and

we would take prospective clients or perhaps clients that we wanted to do more work with to go and see another client, where we had successfully transformed a company. People would hear from members of the teams that were touched by the transformation and learn from them about not only what worked, but what didn't work because we don't want to pretend that transformation is easy and everything goes perfectly because then you're setting up a false expectation from your client, who's going to see something.

You really want to have an open kimono type philosophy and show all the ugly as well as the good, so people can really understand that changing a company is hard. Then they could learn from others' mistakes as well. It was a great client development tool. You get on a plane with your clients. You sit next to them and you chat with them. I would do programs that would be one day long programs all the way up to week-long programs, which would be a deeper dive into a company. Or sometimes we would have two companies within the week that we would visit.

It really gave an opportunity for clients and consultants to have a shared learning experience as well as for them to showcase the good work that they've done at other organizations, if they were wanting to sell or market to this particular client. I would recommend bringing key decision makers with you when you go on a Go & See and maybe their direct reports, so they could get excited about what is going to be happening with the work you do.

Will Bachman: When we met and spoke a few weeks ago, this seemed to me such an interesting idea. I've never done this myself, but the idea of bringing a prospective client or a current client and introducing them to another, where you've done the work, to help both teach them. You show them in person. It seems like something that independent professionals could really use. Let's go through the process. First, let's talk about how do you choose a really good showcase client that you're going to go to see? What's your selection criteria? How do you make sure that that's going to be a good place to go and visit?

Marni Fechter: Obviously, you want to have a place where there's been process improvements, cost savings. You really want to take people to go and see somewhere where the culture has changed as well because I think it's really easy to get that low-hanging fruit, where you go in and you tweak a process here and there to streamline things. People know that that can be done. Long-term change is hard. It involves changing the culture and creating an environment of continuous improvement. When you find places where you have that kind of energy and excitement, it's contagious.

When you take people to go see something, not only do you want them to see something that's, "Okay. Yeah, we saved all this money," but that people are excited about. They love coming to work and they feel like the improvements have improved their lives as well because you want them to talk to people. If

you just want to see a photo or show a bunch of slides, you don't have to bring someone to go see the organization. You could invite the CEO to sit down and have dinner with the prospective client. You want to take people somewhere where there's a great amount of enthusiasm for the changes that have undergone and that people are willing to talk about them and celebrate their successes.

This also not only seems to have an impact on the prospective client, but what I've noticed is when hosts allow another group to come visit, it renews energy and excitement amongst the staff because they reflect on how they used to work and what's changed and they get reinvigorated as well. There's a positive impact for hosting. There's ways to make the host excited to let people come because it does give them a chance to celebrate their teams and their success, but it also can help with re-engaging with that client. You can go and visit. Then you can send them a lovely email or a report saying what you saw and what's great. You can also say, "Here are some opportunities that I noticed."

That can re-spark an engagement with the client that hosted. It's a really wonderful business development opportunity not only for the people that you're bringing to see, but for the hosts themselves to re-engage with you.

Will Bachman: That's an interesting point that there's benefits to the host organization. Any listeners who are clients and have done great work, maybe flip it and reach out to the consultants that work with you and say, "Hey, let's do a visit here." If you were trying to remind all of the team about the transformation that you did and get them excited, it might be a good idea to invite guests in.

Marni Fechter: Right. Not only do you get the perspective of the consultant that worked with you, but you get the perspective of the executives who are coming to visit, who all have 20, 30 years experience. They can provide you with feedback. It's like getting a whole bunch of people coming in and consulting for free. Just walking through and sharing what they're observing.

Will Bachman: Paint me a picture of what a one-day visit would be like. Sanitize it, obviously, but maybe you can sanitize an actual Go & See that you've done. Describe for me the facility. Do we sit in a team room all day long? Are we touring a factory or a mine or a lab? Give us a visual tour here as if we were on one of these.

Marni Fechter: All of the above. I have done Go & Sees at banks, at insurance companies, at pharmaceutical companies, at manufacturing companies, in mines. It really works in each industry. What I would recommend is having a space that would be a conference room that would be home base for the day. Serving breakfast because people like breakfast and particularly like coffee. Then having an introduction that's not given by the consultant, but that's given by the head of the transformation program or the head of the business line. Depending on the size of the organization, if the CEO is actually on site and available, or the

president. They can come in and welcome everyone and give a general overview of what the firm state and what the two state has been. To think through even what the future goals are. Where you're going on your journey of transformation.

Then once you have your overview, you can start doing a walk through. If it's a lean transformation, you can have the group that's visiting go and actually attend huddles and process confirmations. If it's a digital transformation, there's often a digital lab that's fun to walk through. Make things interactive so that people can actually see digital management or see how something has transformed. Give them a clear understanding of how the work used to happen. I would recommend having [inaudible 00:11:40] sessions broken up with walk throughs and also have panel discussions, where you can have frontline workers have a panel discussion to share their experience, middle managers, senior managers. Really make the day conversational rather than just someone speaking to a bunch of flies.

Obviously, you want to have a few slides to show the business success. What the problem was, what was solved, what costs were saved, how much productivity increased. All that kind of stuff that people ... They want numbers. It's more about understanding how the people and the culture were impacted by the work that was done within the organization because I think that's what lacks. I think we've all heard the numbers about how many transformations don't stick. We all need to do work in transforming the culture. That's why I would advise if you have a client where the culture has changed, where people are excited, you want to take people to go and see that.

That doesn't mean that you can't take people to go and see a place where the process was improved if you have a really interesting story. You want to make sure it is interesting and makes it worth the trip for someone to get on a plane or take a train or even go and drive to go and see something because they're taking a day out of their regular business life to go and visit another organization.

Will Bachman: Tell me about an example of an insight that one of the visitors had to illustrate the power of a Go & See.

Marni Fechter: We took a group to visit an airplane manufacturing company. While we were there, we had a panel discussion with the front line. There was a man on the front line who had been with the company for 28 years when the lean transformation started. He was planning to retire at 30 years with a full pension and everything. He was explaining he's now been there for 32 years because he loves coming to work and it's so interesting and exciting. Everybody contributes their ideas and problem solves. It's completely changed the way he works and he loves his job now, which had gotten very stale.

Somebody in our group that was visiting asked what was a good question, because the company gave \$50 awards to people who had problem solved. If you solved a problem, you got \$50. She said, "Look, the company I work at would never give a cash incentive. Do you think you would problem solve and your teams would problem solve if they weren't getting this money?" He said, "Oh, none of us keep the money." She said, "What do you mean?" He said, "Oh, well we had a team member who had MS and doesn't work here anymore. Everybody on the front line agreed that we would donate whatever money we would get from raising problems to MS research in this person's name."

The vice president of the company was moderating the panel. He said, "You do what?" He said, "Yeah. None of us keep it. We give it to the MS Foundation." The vice president had no idea and said, "Well, let's talk after the panel because we have a matching program for donations at the organization." It was really interesting because it demonstrated that the culture was such that people cared about their colleagues and they were interested in problem solving for the sake of problem solving, not because they were getting this money. It's also really nice because I'm a softie. That was one of those moments where I was getting a little choked up at work.

People really learn a lot. There have been instances where ... I was at a call center and a front line worker was explaining that they had a ... It was a car insurance company and they had a new product roll out. There was a problem where the phones were backed up and people were waiting almost 20 minutes for calls. He had noticed that the script for the new product had a lot of questions they had to get through. What's your name, what's your policy number. All these questions. I don't remember all of them, but the seventh question was how old are you.

The product is only good for people who were 25 or older. He recommended, "Why don't we just change the order of the questions? After you ask your name, ask someone how old they are. If they're under 25, we explain that we can't sell you this product and move on." The organization took his feedback and immediately changed the script and how it was written in the computers. The next day, the call times, the hold times went back to their regular times. Everybody saw that through this lean process where the frontline workers were able to give their feedback and share their insight and having that flattened reporting line and not having such bureaucracy to make changes, within one day, there was a huge shift in the wait time of the customers.

That was eye-opening for people. I've had clients at the end of one day say, "Okay, we're going to do a lean transformation. We're going to do a digital transformation," just from going on a visit. That's how impactful these visits are.

Will Bachman: Talk to me about some of the logistics around making one of these kind of visits successful.

Marni Fechter: There's two pieces. One is the content and the other is moving bodies from point A to point B. It really depends on the size of your group. In terms of developing the agenda, I would recommend asking your clients what they're most excited about and who the best people to talk to those topics are. They know. If you know you have a client that's interested in seeing a particular thing and you push for that, that's fine, but I would recommend letting your host client really lead the way because they know they're people. They know what's working, what's not working.

One thing I would highly recommend because I've made this mistake is I would always have people say to me, "We want to watch a problem solving session." I finally said, "Okay. Let's schedule watching a problem solving session." The problem solving session happened to be about picnic tables for a Fourth of July event and it was the most boring thing that people have ever had to sit through. It was horrible. It was so embarrassing. Everybody was on their phone. It was a mess. You can't control for that. You can't tell people, "Okay, we want to watch a problem solving session, but we want for it to be really interesting. You need to choose an interesting problem for us to watch."

What's more interesting is hearing about the process and if there's problem solving boards or any way that ... A room. A war room that people have for problem solving or something that people can see to take the people out of the conference room, bring them to this space where the problem solving occurs and have a few people that work on problem solving come and talk about how this has evolved since doing the work with the consultant. Just make sure you don't get too in the weeds with things because it sounds great in theory, but then when you're standing there watching, it's totally painful.

Make sure your program is interactive, has as few slides as possible. Involve people from all levels of the organization. Really focus not only on the process, but the mindsets and behaviors that were necessary for the transformation to stick. I would recommend organizing a dinner the night before if people have to travel. If you're bringing a few prospective clients who don't know each other, they could meet. If you're taking one large group from an organization, you could have dinner with them and you could invite some people from the organization that you're visiting to join you for dinner because it just creates a sense of camaraderie and it's a little less formal than when you're visiting the organization itself.

Then as far as logistics go, you could invite people. You could recommend some hotels near the site, but for just a one-day visit, I wouldn't book the hotel because a lot of times you might book a Marriott and people have Sheridan points or [inaudible 00:22:13] points or whatever they have. They're not

going to stay at a hotel you booked, so you're going to lose money. If it's a one-day visit, then people are going to choose where they stay. Let them choose. You can have some recommendations for them. If it's a multi-day visit, I would almost insist that everybody stays at the same place and book a block of rooms for them because if you're getting up early in the morning and taking vans places, you want people to all be in the same place.

You have to book some conference space if necessary. You want to work with your host clients. Make sure that not only are they booking the speakers for the agenda that you create with them, but also that you have booked a space on site to be your home base sort of a conference room. If there's rooms with windows, that's always better. A lot of places don't have those. You just have to sit in a dingy room in the basement somewhere, but you get out and walk and see the factory or see the call center or visit the mine or whatever it is you're doing. Just make sure you're not sitting and listening to someone talk through slides because that's a waste of someone's time. They could do that in their own office.

Will Bachman: Any tips on how structurally or anything that you did ... That when you close the sessions to invite reflection and get the visitors to share what was most interesting or the key insights for the day to somehow process it collectively? Anything around that?

Marni Fechter: Yeah. If it's a visit with just one group from one company, you can debrief with everyone and ask people to share what they learned, to reflect on how they could apply what they learned in their own organizations. I would recommend if you're bringing multiple groups ... Let's say you have one host and you want to take five or six potential clients to go and see on the same day because you don't want to ask them to give up five days. "We're going to bring multiple people from different companies to your organization today." You might want to ask them to debrief in small groups, to talk to each other and then share with the [inaudible 00:24:59] what their key takeaways were.

Then I would also recommend doing some sort of followup when they're not on site to meet with them and talk through more deeply what the key learnings were and in what ways it could apply to their own organization. A lot of times [inaudible 00:25:26] go and see people or thinking about all the emails they've missed throughout the day or what plane they have to catch or weather conditions and if their flight is delayed and should they try to get on a different flight. Debrief can wind up being more rushed. I would recommend debriefing on site, but planning some time within the next week for a deeper conversation.

Will Bachman: Marni, turning the focus to you, I'm always interested to hear from guests about what you found works for you to make you more effective, more efficient. Your productivity. Could you talk to me about anything that you've

been doing, either for a long time or new habits you've recently adopted that are really working for you?

Marni Fechter: I'm the queen of the checklist. I'm the person who gets up in the morning and writes a list of everything they have to do that way. I take yesterday's list and anything that I didn't get to, I add to my list. I get great satisfaction out of checking things off of crossing things out. I do it by hand and write it rather than on the computer. It's always worked for me. It continues to work for me. I think in terms of being effective with clients, I like people. I genuinely like people and I care about them and I want people to succeed. I want people to learn and grow because that's what's important to me for myself. I enjoy what I do and I listen.

I think by really listening to people and asking good questions, I'm able to discover where they're struggling and what they want on a deeper level. Hopefully either provide it for them, or if I can't, I have an extensive network. Think through who it is I know that can help them with whatever it is they're working on.

Will Bachman: Could you share the titles of any books that you have frequently gifted or that just have meant a lot to you?

Marni Fechter: Oh, gosh. I wrote a novel called Royal Entertainment. I've given my novel to a lot of people. It was published about three or four years ago. Shameless plug for my own book.

Will Bachman: Absolutely.

Marni Fechter: That book was based on my life when I was transitioning out of working as a social worker and working for one of the most famed party planners in New York City, who did all the parties at Studio 54, and then at his own company. I fell into doing this. It was a bit crazy and fun and interesting. He was a real character, so I wrote a novel about him.

Will Bachman: Before you did Go & Sees, you were planning high-end parties?

Marni Fechter: Yeah.

Will Bachman: Probably confidential, but can you share any kind of examples ... Sanitize, if necessary, of the kind of shindig that you were involved in creating?

Marni Fechter: I'm not going to name names, but people that "pay attention to this sort of stuff" will remember all the stories in the New York Times and Wall Street Journal about a particular hedge fund executive who had a 60th birthday party at the Park Avenue Armory. I produced that party. We had Rob Stewart playing. Patti LaBelle sang "Happy Birthday." Martin Short was the emcee. It was the first event hosted by the Park Avenue Armory since Brooke Astor's 100th birthday. It was pretty big. That was the biggest event I did and it was

many, many, many millions of dollars. The New York Times underwrote it by about four million. They estimated it and they estimated it wrong.

That was a big party. I've also done a lot of fundraisers for nonprofits, which are dear to my heart. Like [inaudible 00:30:13] in California, which is an organization that basically the executive director is a wonderful, well-known chef in Sonoma County. She started a program teaching kids who are transitioning out of foster care or juvenile detention, drug rehab, poverty and other difficult situations how to cook. Her program is a restaurant. The school is a restaurant. They're open for brunch Saturdays and Sundays. Every third Thursday a well-known chef in Sonoma County comes and cooks with the kids.

They have these fundraising dinners every third Thursday. The local wineries donate wine. She's had over 500 kids go through her program. The program is free and supported by people who go to the restaurant and buy the food. They also do catering. She has had over 500 kids go through the program. All of them have jobs. One of them is cooking at a Danny Meyer restaurant in New York right now. They're proud of him. It's a wonderful program. I have done fundraisers for Face to Face, which their big push right now is Malawi is facing the biggest drought in their history and sadly is under-reported. Face to Face is teaching people in Malawi permaculture, so they can build gardens in their own homes.

People will have a garden that can feed a family of five indefinitely. The gardens are saving lives every day. They cost about \$2 each to build. The \$2 is to pay the local people that are trained to train people on how to build their own gardens. I've done fundraisers over the years for Face to Face. I've worked on The Pines Party, which raises money for The Pines environmental issues, in terms of preserving the ocean and also for the gay men's health clinics. I work on that. That's a party on the beach for 4000 people. That's busy.

Yeah. I've done a lot. One of the things I'm really excited about right now is the work I'm doing, which is Go & Sees with an organization called [inaudible 00:32:48] which was started by Dr. [inaudible 00:32:50] She is a physician. She's a pediatrician and she started a pediatric clinic in Sri Lanka after the tsunami. She's started clinics after that in Haiti after the earthquake and was in India, Uganda. She started an organization called [inaudible 00:33:15] because through her work in international medical relief, she started eating all these really good NGOs ... Nongovernmental organizations. She basically thought about how she would see best practices and best practices take into account environmental issues as well as cultural issues.

They set people up for success and independence. Rather than becoming dependent on the NGO, they become independent and able to bring

themselves out of poverty with the support of [inaudible 00:33:56] They don't have negative impacts on their environments or side effects that people often don't think about the cultures when they go in to do this sort of work. She started bringing corporate social responsibilities, people, philanthropists, people with family foundations to go and see organizations that have best practices. I've helped her with that.

Also introduced her to Ken Long, the executive director of Face to Face. She [inaudible 00:34:34] to Malawi. Then she decided to take it to the next level. She started an organization called Women Together, which I'm happy to be working with. That organization is providing Go & Sees to people that never get to go anywhere and are never seen, which are indigenous women. Tomorrow is the first Go & See, where she is going to be in Malawi. There are three different groups in Malawi who have never met. One is the group that has been doing the permaculture and sustainable gardening. They are going to be meeting from another area of Malawi.

These women have been in nutritional meals for hospitals, where people are suffering from HIV and also from new mothers. These women are specialists in cooking nutritional food. Then there's a third group of women who build stoves. That might sound like unremarkable, but in a lot of countries where people are very poor, they don't have stoves. They cook over open fires, which is really damaging to the environment because of the CO2 released. In order to cook over an open fire, open air takes more fuel to burn rather than on a closed stove. It impacts deforestation.

These women are getting together to learn from each other. It's pretty fantastic because they're women who know how to garden learning about how to prepare their meals in more nutritional ways. The women who are nutrition experts ... Everybody will be learning how to build the stoves. Well, they're all going to be learning from each other. It's very holistic. You've got your stove. You've got your garden. You've got your cooks. All these groups will be able to go back to their own communities and share this knowledge, but it also has to do with changing these women's status in their communities because they would have been traveling. They would have been seen as the leader.

That's very important for women who are often unseen. Then the next Go & See she's planning is part of the reason the women who are doing the nutritional cooking work wanted to learn more about farming and stoves is because they live near a mountain in Malawi that has been deforested. They really wanted to learn about farming because they've been trying to resource this mountain. Anashu works with a group in Mozambique who these women have reforested a mountain. Her next trip for these women is to take them to go to Mozambique, actually get on a plane and fly, which is unheard of in these

communities. To go and visit the [inaudible 00:38:00] nursery that the women in Mozambique have built and to see the mountains as they had transformed.

Then they can go back and they can bring that to their community, but they'll also bring their own knowledge of the permaculture that they've learned and building stoves and the nutritional cooking. They could share with the women who are doing the seedling nurseries. It's taking the Go & Sees to the next level to impact the fight against global poverty and educating women.

Will Bachman: That is amazing.

Marni Fechter: It is amazing and I'm so excited about it. On my website, [professionaldogooders.com](http://professionaldogooders.com), there's a link to Women Together. You can watch a video about the work they're doing in Malawi.

Will Bachman: That's fantastic. We'll include a link to your novel as well as to your website.

Marni Fechter: Oh, great. Thank you.

Will Bachman: In the show notes. What an amazing discussion. Marni, thanks so much for giving some thoughts and experience on how to do a Go & See and also for sharing some of the stories about the amazing work that you've been doing with these nonprofits. I really appreciate your time.

Marni Fechter: Thank you. I appreciate being here.