

CHANGE MANAGEMENT through SNAPSHOT9

TheGreyMatter.ai

The Brain Behind Your Autonomous Enterprise

POWERED BY

TheGreyMatter.ai

Strategic Digital and Human Sensor Framework

9 Vectors 37 Subvectors 242+ Diagnostic Themes

By Edwin Miller

Executive Chairman, TheGreyMatter.ai Corporation
6x CEO • Turnaround Expert • 30+ Years Experience

| What Do We Really Mean by Change?

"Failure is not fatal. But failure to change might be."

Change is one of the few things we can predict in the world. But how to successfully understand and move it in the right direction is something we tend to predict with less accuracy. Perhaps this is why there is a clear fascination with dramatic change in our culture.

What is it about makeover shows that are so compelling? They're about transformations, so they're always dramatic. They're about improvement—voluntary self-improvement—so we root for the participants to succeed. And because it's television, there's always the expected happy ending.

Entertainment is magic, an illusion. But there is one respect in which these shows mislead us, and it speaks to a similar mistake we see in the literature on corporate change management.

Change does not happen all at once. And meaningful change is not simply a course correction.

Successful changes come because a long time before it "happens," other things underneath the surface occur in order to make it possible. Change is maintained when these underlying factors continue to be present so the change becomes deeply rooted and has true follow through.

So what happens to the "biggest losers" who go on a crash diet or exercise program for a few months? They lose weight. But what often happens after that? They gain it right back! That's the part we generally don't see on a makeover show. Quick fixes are more than misleading—they can even be dangerous. Yo-yo dieting is bad for your health. So not only is there a long route to preparing successful change, and a long route to maintaining it, but your goals must be contextualized based on truth, not whim.

For the greater part of my business career, I've been known as a turnaround CEO. I wrote about this experience in Snapshot9 and in my previous book, 9Vectors: Insight to Action. My work transforming and growing companies provided me an interesting set of experiences to compare the difference between real change that takes deep root and false change that may appear successful on the surface, as well as to enumerate what is necessary to have one instead of the other.

In terms of what we can control, what matters most is thorough and comprehensive alignment—every piece, every part, every person, every phase, and every level that makes up an organization. Alignment to what? Alignment to the desired change objective. This is not the same as alignment to leadership. Change doesn't trickle down. It bubbles up. This is true for the companies that have made the most successful turnarounds. And the best companies always stay one step ahead and shed their skin periodically before the urgency for change is inevitably imposed from outside. So the question is, how can you have both across-the-board alignment and bottom-up empowerment?

| Change Management through Snapshot9

As is often the case in business, technology is our ally. This is where we add an element to the self-improvement analogies, because what we are really looking for is a multiplier. We need a way to deepen and accelerate the natural change process within an organization (whether company, division, department, program, product, or project). What matters is that whatever part of a company we're trying to change, we leverage all the assets, processes, and structures it contains, and integrate them into the new plan.

This means we have to go beyond the kind of change directives driven by leadership or external consultants, like the kind we get at a typical offsite meeting, and we need to go beyond the "tiger team" approach that makes a particular set of people in the organization uniquely responsible for designing and implementing change. In fact, some companies don't even get around to forming tiger teams.

This can result in a group of people inside the company who spontaneously ally themselves to push a change forward. And while this may sound like a move in the right direction, these self-appointed "cowboy teams" often become alienated and isolated from the rest of the company, unless they are given complete autonomy and responsibility. And that's not always an option. Moreover, the cowboy method is much more reactive than proactive. In other words, it usually comes too late.

What we need is a change process that penetrates through every aspect of an organization.

These aspects are what I referred to in Snapshot9 as the nine vectors:

ASSETS	PROCESSES	STRUCTURES
MARKET Understanding the market, opportunity, characteristics, size, timing, investment, target, customer behavior, positioning, competition and differentiation.	STRATEGY Envisioning and designing the company go-to-market plan, aids in determining any breakout moves for the organization.	EXPECTATION The setting, managing, and communication of expectations throughout the organization and with company stakeholders.
PEOPLE Assessing the people, their motivation, strengths, capabilities; and the culture, who the leaders are, level of transparency and collaboration, what politics and dysfunctions exist.	OPERATIONS The processes, systems and infrastructure used by the organization; the bridge between strategy and execution.	GOVERNANCE Ensuring the ethical and compliant operation of the organization.
FINANCE Viability of the financial model, assets, liabilities, comparable performance, capital requirements, financial statements and constraints.	EXECUTION The action or doing, and measurement of the strategy and operations.	ENTITY The type of organization, protection of intellectual property and understanding of legal liabilities.

And we need this change process to happen continuously and repeatably so that it's not a quick-fix, but an ongoing evolution based on the solid foundation that is built from a company's core competencies.

| Using Technology as a Catalyst, Multiplier, and Continuous Support Tool

The 9Vectors platform is a tool for **enterprise performance and knowledge management powered by both Digital Sensors and Human Sensors**. To coordinate all the interconnected elements of an organization and get the level of buy-in and idea generation needed at every level of the company, you need a healthy internal dialogue combined with comprehensive data intelligence. The most effective way to capture this is through an intelligent cloud platform that integrates both automated data collection and stakeholder insights.

The Dual Sensor Approach: Digital + Human Intelligence

TheGreyMatter.ai platform captures insights through two complementary channels:

DIGITAL SENSORS	HUMAN SENSORS
• System integrations (CRM, ERP, Analytics) • Financial data ingestion • Operational metrics & KPIs • Market intelligence feeds • Performance dashboards • Automated data collection	• Stakeholder assessments • Leadership evaluations (Measurement13) • Team feedback and surveys • Cultural diagnostics • Qualitative insights • Expert knowledge capture

While many companies have executed successful change without this sort of technology, the cloud application provides a powerful multiplier. It lets you do more with less. Less money especially (anyone who has paid McKinsey or Bain knows what I mean). But also less disruption and intrusion, which is an advantage in its own right, especially when you are on a strict timetable.

If you think of your company or division as a body, the 9Vectors provide an exhaustive way to get every cell in the body involved in the change initiative—the muscles, bones, joints, and especially the network of neurochemical signalling mechanisms. That's ultimately what will help us get fit.

The rest of this workbook focuses on using the Snapshot9 application to drive change through the company's financial model, which we locate in the 9Vectors metadata architecture as a sub-vector of the financial vector. This is not something only the CEO and CFO need to worry about. That's like saying the stomach doesn't need to worry about the hormones being produced in the brain.

Think of the financial model as a hormone production and regulation mechanism. Is it functional or dysfunctional? Is it telling you to eat too much or too little, to exercise too much or too little? You can't change it or reset it all at once, and you definitely can't do so without aligning all the other parts of the body. What Snapshot9 gives us is a way to pinpoint needed changes through the power of **human data discovery combined with digital data ingestion**, map them out through **integrated design**, and carry them out through **continuous assurance**.

We take a snapshot of your organization's "metabolism," as represented by its degree of customer touch, its sales volume, and its per volume profit margins. Once we have a clear picture, we analyze decisions that would move these indicators in a positive direction. The moves do not happen all at once, but are presented and occur in a practical sequence over time.

Nor are these moves accomplished by yourself. Instead of relying on offsite heroes, tigers, or cowboys, Snapshot9 begins and ends with collective learning, teamwork, accountability, empowerment, and alignment around a clear and measurable set of shared goals. That's how everyone at all levels will truly be able to succeed.

| The Snapshot Baseline - Get Ready for Your Close Up

Change management through Snapshot9 begins with a **human data discovery process combined with digital data ingestion**. This establishes the baseline snapshot for the company so we can determine what kind of changes might improve it. It's important to get all of the impacted stakeholders involved from the earliest phase and keep them involved throughout. This is the only way real and lasting transformation is possible.

However, "survey" is a somewhat misleading word because rather than a static questionnaire that is given once and then filed away, the Snapshot9 baseline is powered by software that acts as an "intelligent interviewer," designed to promote an ongoing, bilateral exchange of knowledge about the company. In this case, we are looking to identify your company's current signature in terms of:

TOUCH	VOLUME	MARGIN
• Understand/Implement Offering • Customer Service • Sales & Marketing • Billing & Collecting • Production & Delivery • Operational Bottlenecks • Economies of Scale	• Sales Channels • Addressable Market • Targeting • Repeatability	• Pricing • Collectability • COGS/COS • Gross Margin • Operating Overhead • Profit Margin

You can obtain valuable information and insight just by asking your stakeholders about these key elements while simultaneously ingesting digital data from your enterprise systems. What you'll find is that not everyone gives the same answers—and digital data often reveals patterns that human perception misses. This is not a problem! The presence of varying thought within your company is actually a good thing. It points to gaps in knowledge and alignment and therefore opportunities for change. It also creates dialogue and buy-in to the change process, and prods participants—particularly executive leaders who often drive the effort with too little input—to make a true commitment to organizational change.

| Overcoming the Biggest Barriers to Change

Throughout my business career, I've found that the major barriers to change are:

- Sticking to what we already know
- Acting only on what we directly observe
- Resisting opportunities for learning because of pride
- Valuing our own perspective over that of others
- Pretending to understand when we do not

The only way to overcome these barriers is through honest dialogue combined with comprehensive data and a shared sense of urgency. Change needs to come from the inside now before it comes from the outside later, when we're unprepared for it. That's why crowdsourcing a conversation with Snapshot9—powered by both digital and human sensor data—can be such an important first step.

| Assessing the Baseline and Building a Strategy through Integrated Design

The Snapshot9 baseline is just the beginning of the change management process. The real work comes when we decide what the results mean and what we can do about them. Imagine, for instance, that your company completed the baseline and the results indicated a specific pattern. I've given examples of familiar companies that exhibit various characteristics.

The False Peak Problem

The False Peak snapshot (low touch, high volume, low margin) is one of the more interesting snapshots because it appears like things are going well. High volume indicates that a lot of customers are using the products, and the companies are not spending a tremendous amount to generate the touches necessary to service these customers. The problem is that the margins are very low.

The truth is that companies with this profile are in trouble. With this financial model, their long-term chances for sustainable growth are not good. Without strong margins, False Peak companies are forced to burn cash over the long term to maintain their level of volume. The good news is that because they do have all those customers, if they can get them to value the product more, they can shift to a more viable model with higher margins.

The Sand Castle Problem

The Sand Castle snapshot (high touch, low volume, mid margin) can be even more dangerous than the False Peak. There are reasons for optimism here, because it appears from the low volume that there may be some relatively focused customer relationships, and from the mid margins that the product is at least paying for itself and maybe even generating a small amount of cash flow.

Scale could be a potential problem. If it takes such a high concentration on customer touch to reach this relatively small number of buyers, think about how much more it would cost to grow the product. Clearly the touch needs to improve, but the goal is to do this without sacrificing customer loyalty.

| The 27 Snapshot Framework

The False Peak and the Sand Castle are just two of the 27 snapshots. There is no one-size-fits-all "best" snapshot, just as there is no way of decorating your home and garden and no diet and exercise regimen that is always the best. But for a given industry, market segment, market time, company size, and company maturity, we can identify the snapshot that is best worth emulating.

The snapshot for your company could be a warning sign, or it could be a welcome surprise. Even for the best snapshots there is always room for improvement, because a financial model that is working now might not be sustainable in the long run. The more nuanced considerations come into play when we consider the implications the financial model has for the other nine vectors of the business, and when we think about what changing the financial model would mean for all of those other aspects of the company.

| Changing Your Snapshot through Integrated Design

In all of the 9Vectors applications, including Snapshot9.ai and Measurement13.ai, we begin with the process of **human data discovery combined with digital data ingestion** and then move to build a strategy and implement it through an operational road map in the **integrated design** phase. There is also another phase we call **continuous assurance**, in which we aggressively retest our assumptions and conclusions to make sure the results are bearing them out.



And then, because enterprise management is continuous and reiterative in a business world that is constantly changing, we periodically revisit the discovery phase and repeat the cycle. This is where the repeatability of Snapshot9 can add value to a change management initiative. The application allows you to make a move to improve your financial model and, in the course of making that move, identify new possibilities for an even better snapshot.

I also want to be clear that Snapshot9 plays well with others, and needn't be the only change management resource your company uses. For example, many companies discover they realize tremendous cost savings using Snapshot9 mainly as a discovery tool, and then move forward to a more limited and focused traditional consulting intervention, or translate the results into an existing company change management platform, or use another set of relevant metrics like a balanced scorecard.

| Benefits of Automating the Conversations Around Change

Integrated design is a powerful technique in its own right, and one that is less commonly used in a conventional change management setting. Even companies that do a reasonably good job including all their stakeholders into an assessment of the status quo rarely include them in the formation and implementation of their new strategy.

Sometimes this is because the company's commitment to collective learning and improvement is relatively shallow. But sometimes this is just because the company views the design process as too disruptive to their day-to-day business. This latter problem is one we've tried to address with Snapshot9.

Automating the conversations within the company—through both digital data collection and human sensor inputs—minimizes disruption and therefore keeps more voices in the dialogue. As I've indicated, this is a crucial benefit, because ultimately it's not just the upper-level leaders who are going to make the change. In fact, the further we get into the process, the less important their role.

Without a shared sense of accountability and ownership, even the best strategy can grind to a halt. That's the danger in depending too much on any one leader, or even on something like a tiger team.

Sample Operational Roadmap

ADD/CREATE	REMOVE/CONSOLIDATE
• Remote implementation program • Lead prospecting capabilities • User conferences to streamline learning • Tight target customer profiles and qualification	• Outside sales • Software bugs • Redundant processes
IMPROVE/AUTOMATE	REDUCE/STREAMLINE
• Product reliability • Inside sales floor • Online help and support • Cost of sales • Functional and departmental efficiency	• VAR/Channel sales • Large marketing effort on wrong targets • Marketing spend • Churn • G&A; overhead and flatten organization

| Conclusion

The general goal of Snapshot9 and of the 9Vectors platform is to replicate what 'best of breed' companies do in their change management efforts through an automated digital and human sensor infrastructure. Smart companies are constantly seeking the best tools and processes available, as well as the best and most practically useful data analytics they can find.

So what is your snapshot? Don't be afraid to look in the mirror and see what the status quo really is, instead of what you hope it is. Because that's the only way you'll see how much better it could be. Don't be afraid to open your change management effort to the entire organization—combining both digital data ingestion and human sensor feedback. That's the only way it will truly succeed.

And don't be afraid of enterprise automation—changing your company is definitely hard work, but you don't get bonus points for the sheer amount of suffering you go through. Results are what matter, and lasting results are what really matter. If your company's approach to change management is stuck in the 20th century, maybe it's time for a change to Snapshot9.

Ready to Transform Your Organization?

Visit thegreymatter.ai to learn how our agentic AI platform can accelerate your change management initiatives with executive-grade strategic intelligence.

About the Author

Edwin Miller is the Executive Chairman of 9Vectors Corporation and TheGreyMatter.ai. He is an accomplished six-time CEO recognized as both a growth and turnaround thought leader of both public and private companies. He has successfully transformed domestic and international organizations through both organic and acquisitive means. His experiences span many different technological, horizontal, and vertical markets.

Edwin is the author of "9Vectors: Insight to Action" and "Snapshot9" and is active on the speaking circuit around the globe. Edwin is a member of Young Presidents' Organization (YPO), and serves as a director on numerous boards.

Edwin earned his BS from Liberty University, where he was on a full athletic scholarship for Division I Basketball and was an Academic All-American, and an MBA from The George Washington University.

KEY ACHIEVEMENTS

- **Marchex (NASDAQ: MCHX)** - Achieved profitability for the first time in 13 years; improved gross margins from 50% to 70%+
- **Astrea Partners** - 7x revenue growth (\$35M to \$130M); improved annual cash flow by \$22M
- **Infodata (NASDAQ: INFD)** - 14x exit multiple
- **9Lenses/9Vectors** - Founded 2011, successfully acquired by Astrea in 2017
- **Recognition** - Top 25 Tech CEOs of Seattle 2025

PLATFORM thegreymatter.ai 9vectors.ai	CONTACT Edwin.Miller@thegreymatter.ai	ASSESSMENT TOOLS snapshot9.ai measurement13.ai
---	--	--