AFS Practitioner Working Guide

I'm sitting across from a leadership team — now what?

By Mario Aiello

Part 1: Before you say anything

I don't always know who will be in the room. Sometimes I find out the day before. Sometimes I find out when I arrive and someone I wasn't expecting is sitting at the table. That stopped bothering me a long time ago. What matters more than who's there is what's already been decided before I walked in.

That's the first thing I try to read. Not the problem statement they've prepared — the decisions that are already locked. In most leadership rooms, by the time a practitioner is invited in, the energy has already moved somewhere. Someone has a preferred solution. Someone else has already failed at this. There's a coalition that brought me here, and there's probably a coalition that didn't ask for me. None of that will be said directly.

So before I open my mouth, I'm reading the room for a few things.

Who's doing the talking. In a healthy leadership team, different people speak to different parts of the problem. When one person is doing most of the framing — especially the first framing — I take note. That person either owns the problem or owns the preferred solution. Sometimes both. Either way, they're setting the boundaries of what's discussable.

What's conspicuously absent. The functions that aren't represented tell me something. If this is framed as a technology transformation and no one from operations is in the room, that's information. If it's framed as a cultural change and HR isn't there, that's information too. Absence is usually intentional, even when people claim it's logistical.

The texture of the problem statement. There are roughly four ways a leadership team presents its situation to someone like me: a problem statement ("we have an issue with delivery"), a failed initiative ("we tried X and it didn't work"), a mandate from above ("the board wants this"), or vague discomfort ("we feel like something isn't working but we can't quite name it"). Each one tells me something different about where fitness actually sits.

A problem statement usually means they've already done some diagnosis — or think they have. My job is to find out whether the diagnosis is real or whether it's the first available explanation that didn't require too much internal disruption to accept.

A failed initiative is actually the richest entry point. Something was tried. Something didn't take. The question I'm holding is always: did it fail because it was the wrong intervention, or because the system wasn't fit to receive it?

A mandate from above is the most treacherous. There's often nothing to diagnose — the decision has already been made. My job becomes understanding whether I'm being asked to help implement something, or whether there's still room to ask whether the thing being implemented is the right thing. That's a political question as much as a professional one, and I've learned not to assume the answer before I've heard more.

Vague discomfort is underrated as an entry point. It means the system is signaling something it can't yet name. That's actually a good place to start honest diagnostic work — nobody has committed to a solution yet.

None of this analysis happens out loud. I'm not narrating it to the room. I'm just orienting before I start asking questions that actually open something.

Part 2: The first conversation

The first conversation is doing three things at once. I'm diagnosing. I'm building enough trust that people will say something true. And I'm taking a first read on fitness — not the fitness of their processes or their teams, but the fitness of this leadership group to engage honestly with what's actually happening.

Those three things can't be separated into sequential steps. They happen simultaneously, which means the questions I ask have to carry more than one purpose.

The most important thing I've learned about this conversation is that I'm not trying to solve anything yet. I'm not even trying to fully understand the problem yet. I'm trying to find out whether the problem they've described is the problem. That's a different task, and it requires a different kind of listening.

I listen for the gap between what's said and what's felt. Leadership teams are usually articulate. They've prepared. They have slides, sometimes. They know how to present a situation in a way that sounds considered and actionable. What they're less good at — especially in a room with someone they don't know yet — is saying the thing underneath the thing. The frustration. The fear. The internal conflict that's been sitting unaddressed for two years. That's what I'm listening for, not the presented version.

I start with questions that invite description, not diagnosis. Not "what's the problem?" — they've already answered that in the version they prepared. Something more like: *walk me through what a normal week looks like for a team in the middle of this*. Or: *what did you expect to happen when you launched the initiative, and what actually happened?* These questions ask for narrative, not analysis. Narrative is harder to manage than analysis. People tell me things in narrative that they would never say if I asked them directly.

I'm also listening to what they assume I already know. If someone says "you'll understand, given your background in banking" — that's a bid for affiliation. They want me to be on their side before I've heard the whole story. I note it and stay neutral. If someone says "we've had consultants look at this before and they all said the same thing" — that's a warning. They've been given frameworks before. They're either testing whether I'm going to do the same thing, or they've already decided I will.

The Four Questions — fit for what, fit by whom, fit how, fit until when — are working in the background through all of this. I'm not reciting them. I'm using them as an internal orientation device. I'm listening for which of those questions the room can answer clearly, and which ones produce hesitation, contradiction, or a change of subject. The ones that produce hesitation are usually where the real diagnostic work lives.

Fit for what is almost always partially answered. They know the stated purpose. What they're less clear on is whether the stated purpose is still the real purpose, or whether it was the real purpose when they started but something shifted and nobody updated the brief. That drift — between original intent and current reality — is one of the most common sources of organisational friction I encounter. The system is still executing against a purpose that no longer reflects what the organisation actually needs.

Fit by whom is where trust starts to show up or not. If I ask who defines what "good" looks like — who holds the right to evaluate whether the work is working — and I get a clean answer, I've learned something. If I get hesitation, or three people start to answer at once, or someone looks at someone else before speaking, I've learned something more useful. Contested ownership of fitness criteria is almost always a systemic issue, not a personnel one. But it presents as personnel almost every time.

Fit how tends to surface the gap between declared process and actual practice. They'll describe how things are supposed to work. I'll ask what actually happens when something goes wrong, or when priorities shift, or when two teams need the same resource at the same time. The delta between the official version and the real version tells me a great deal about where energy is being lost.

Fit until when is the question most leadership teams haven't asked themselves at all. They've designed something — a structure, a process, a way of working — and they've implicitly assumed it's durable. I'm not interested in pointing that out as a flaw. I'm interested in what it reveals about how the organisation relates to change: as something that happens to them, or as something they navigate.

Throughout all of this, I'm also making a fitness read on the room itself.

Can this group tolerate ambiguity long enough to hear something they didn't expect? Can they stay with a question that doesn't have an immediate answer? Is there enough psychological safety between them that someone will contradict the person who spoke first, or does everyone converge quickly on whatever the most senior person said? These aren't abstract observations. They directly affect what kind of work is possible, at what pace, and who I need to build trust with before anything substantive can happen.

I don't share this read in the first conversation. It's mine. It becomes the basis for how I think about sequencing — what comes next, and what needs to be true before what comes after that can happen.

By the end of the first conversation, I'm not trying to have answers. I'm trying to have a clear enough picture of the fitness landscape that I know what I don't yet know, and why. That's what I'm carrying out of the room.

Part 3: What you're not doing

This is the part nobody writes down because it feels obvious. It isn't.

The traps in a first leadership conversation are not exotic. They're mundane and they're persistent and they're easy to fall into precisely because they feel like helpfulness. I've fallen into most of them at some point. I'm listing them here not as a confession but because naming them is the only reliable defence against them.

I'm not selling.

This one sounds easy. It isn't, because selling doesn't always feel like selling. Sometimes it feels like enthusiasm. I've noticed something real, I can see how the AFS applies, I can already sketch a path from here to somewhere better — and the temptation is to share that. To demonstrate value by showing what I can see.

The problem is that the moment I start showing them what I see, I've shifted from diagnostician to vendor. The conversation reorganises itself around whether they want what I'm offering, rather than around what's actually happening in their organisation. Once that shift happens, it's very hard to undo. They start evaluating me instead of thinking with me. I become one more person who came in with a solution.

The discipline is to stay curious longer than feels comfortable. When I notice I'm formulating an answer, I treat that as a signal to ask another question.

I'm not validating the solution they've already chosen.

This is the most common trap, and the most politically charged. In most cases, by the time I'm in the room, someone has already decided what the answer is. The transformation programme has been scoped. The operating model has been drafted. The vendor has been shortlisted. I've been invited to add credibility to the process, or to help with implementation, or sometimes just to be the external voice that confirms what the internal voice has been saying for months.

I understand why this happens. It's not cynical — or not always cynical. People arrive at conclusions through genuine reasoning. They want confirmation that their reasoning was sound.

The problem is that confirming a solution before I've done any real diagnosis is a form of professional negligence. It might be the right solution. Sometimes it is. But I don't know that yet, and pretending I do — or letting them assume I do — means I'm not actually doing the work I'm there to do.

The way this trap usually presents is as a leading question. "You'd agree, wouldn't you, that the real issue is alignment?" Or: "We're thinking of restructuring around value streams — does that make sense given what you've heard?" These questions aren't hostile. They're often genuinely curious. But they're asking me to land before I've finished the diagnostic flight, and the honest answer is almost always: I don't know yet.

I've learned to say that directly. Not as a hedge, not as a disclaimer — as a statement of where I actually am. "I'm not far enough in to have a view on that. Let me ask you something first." Most leadership teams respect that more than they expect to.

I'm not accepting the problem statement at face value.

The problem statement is a hypothesis. It's the organisation's best current attempt to explain to itself what's wrong. Sometimes it's accurate. More often it's the first available explanation that didn't require too much internal disruption to accept.

This isn't a criticism of the people in the room. Organisations genuinely can't always see what's happening to them. The system is too close to itself. The people with the clearest view are often not in the room. And the people who are in the room have legitimate reasons — political, relational, cognitive — for the diagnosis they've arrived at.

My job is to hold the problem statement lightly. To treat it as data about how the organisation understands itself, which is interesting and useful, rather than as an accurate description of the underlying condition, which it may or may not be.

The practical consequence is that I don't start building an intervention logic from the problem statement. I start asking what would have to be true for that problem statement to be correct — and then I look for evidence of whether those things are true. Sometimes they are. When they're not, I've usually found something more interesting than the stated problem.

I'm not performing expertise.

There's a version of this work where I demonstrate how much I know. I name the patterns I'm seeing. I reference the frameworks. I show the room that I've been here before and I understand their situation. It signals competence. It builds a certain kind of credibility.

It also closes the conversation down.

When I perform expertise, I'm implicitly telling the people in the room that I already understand their situation well enough to categorise it. That makes them passive. They stop offering the contradictions, the hesitations, the quietly important details that don't fit the category I've suggested. They start giving me information that confirms what I've already said, because that's what you do when an expert has named your problem.

The expertise is real. It needs to stay mostly invisible in the first conversation. It operates in the background, shaping the questions I choose, the things I notice, the hypotheses I'm quietly testing. It doesn't need to be announced.

I'm not trying to leave with a mandate.

This is the hardest one, especially under commercial pressure or when the conversation is going well. The first conversation isn't supposed to produce an engagement. It's supposed to produce enough mutual understanding that both sides — me and the leadership team — can make a considered decision about whether there's work worth doing together and what shape that work should take.

Sometimes the right outcome of a first conversation is: not yet. The fitness conditions aren't there. The political situation makes genuine diagnostic work impossible. The organisation is committed to an intervention path that I don't think serves them, and they're not ready to hear that. Walking away from that with honesty intact is worth more, long term, than closing an engagement that was never going to work.

I don't always get this right. But it's what I'm aiming for.

Part 4: What comes out of it

Not a proposal. Not a roadmap. Not a set of recommendations with a timeline and a budget attached.

What comes out of a first conversation — if I've done it well — is a fitness read. And a fitness read is a specific thing. It's not an assessment in the consulting sense. It's not a gap analysis. It's a structured picture of what I now know, what I don't yet know, and what needs to be true before any particular kind of work becomes possible.

Let me say what that looks like in practice.

What I know.

After a well-run first conversation, I usually have a reasonable read on three things.

The first is the nature of the entry point — which of the four modes brought me here, and what that implies. A failed initiative tells me something different from a mandate from above. Vague discomfort tells me something different from a presented problem statement. The entry point shapes the political landscape of what's possible, and I need to be clear with myself about which landscape I'm in.

The second is where the Four Questions produce clarity and where they produce friction. Some organisations can answer "fit for what" cleanly and struggle badly with "fit by whom." Others have a sophisticated view of how fitness is evaluated but no real mechanism for sustaining it over time. The pattern of clarity and friction is diagnostic. It tells me where the system is coherent and where it's working around something it hasn't named.

The third is the fitness of the leadership group itself to engage with what's actually happening. This is the most consequential thing I carry out of the room, and the most rarely discussed. An organisation can have a real problem, a genuine appetite for change, and a practitioner who knows exactly what to do — and still produce nothing, because the leadership group can't hold the ambiguity long enough for the diagnostic work to happen. I've seen it. It's not a failure of intelligence or intention. It's a fitness condition, and it has to be read honestly.

What I don't yet know.

This is at least as important as what I do know, and I try to be precise about it.

I don't yet know whether the problem statement reflects the actual condition. I have hypotheses. I know which parts of the stated diagnosis feel solid and which parts feel like the first available explanation. But I haven't seen enough to commit to a view.

I don't yet know who else needs to be in the conversation. The people in the room are not the whole system. There are almost always people closer to the actual work who hold information the leadership team doesn't have, or doesn't have accurately. There are almost always people who weren't in the room whose buy-in will determine whether anything changes. I know I don't yet know who those people are or how to reach them.

I don't yet know whether the conditions for useful intervention exist. That's a harder thing to sit with, especially when the conversation has gone well and there's genuine energy in the room. Energy is not fitness. A leadership team can be enthusiastic about change and still be structurally unable to sustain it. I hold that possibility open until I know more.

What needs to be true before anything else can happen.

This is where the fitness read becomes actionable — not as a plan, but as a set of preconditions.

Sometimes the precondition is informational. I need to see the actual work, not just the description of the work. I need to talk to people outside this room. I need to understand what was tried before and what specifically didn't transfer.

Sometimes the precondition is relational. There's a tension in the leadership group that hasn't been surfaced, and until it is, any work we do together will be working around it rather than through it. I'm not a therapist and I don't do conflict resolution, but I can name the dynamic and be clear that it's a constraint.

Sometimes the precondition is political. The mandate from above is real, the solution is already partially locked, and the question isn't whether the intervention is the right one — the question is whether there's enough room inside the locked path to do honest work. Sometimes there is. Sometimes there isn't, and the honest thing to say is that I can't be useful here in the way I'd want to be.

And sometimes the precondition is a fitness condition in the deepest sense. The organisation isn't ready. Not because the people are incapable or unwilling, but because the system doesn't yet have the capacity to absorb what genuine diagnostic work would surface. In those cases, the most useful thing I can do is say so — clearly, without condescension — and describe what would need to shift before that capacity exists.

How I communicate the fitness read.

Not as a document. Not as a slide deck. Usually as a conversation — a short, direct follow-up with the person or people who brought me in.

I tell them what I heard. Not a summary of the meeting — a reflection of the pattern underneath the meeting. What the Four Questions revealed about where the system is coherent and where it isn't. What I'm holding as hypotheses versus what I'm more confident about. What I think needs to happen before we can say clearly whether there's work here and what shape it should take.

I'm honest about uncertainty. If I don't know whether the problem statement is accurate, I say so. If I think there's a tension in the room that needs to surface before anything else can move, I say that too. The fitness read isn't a polished output. It's an honest account of where things stand, delivered to people who are paying attention.

What I'm not doing is telling them what to do. Not yet. The fitness read is the basis for a decision — their decision — about whether and how to proceed. Sometimes they want to go further. Sometimes the fitness read itself is the useful thing, and they need time to sit with it. Sometimes it surfaces something that changes the framing entirely, and we're back to the beginning with a clearer picture.

All of those are legitimate outcomes.

The first conversation isn't the beginning of an engagement. It's a diagnostic act in its own right. If I've done it honestly — stayed curious, resisted the traps, carried the right questions into the room and listened for what the answers actually revealed — then what I walk out with is worth something. Not a mandate, not a proposal, not a relationship that's been closed before it's been opened.

A clear-eyed read on where fitness actually sits.

That's enough to work from.

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