



1.1 What Are We Talking About?

These are definitely not rosy times that companies and investors around the world are currently facing. Fears of a global COVID-19 related recession are omnipresent. Economic research institutes speak of an economic downturn of between 7 and 12% or negative economic growth in the coming years. Ever-increasing unemployment figures are intensifying the climate of general uncertainty. It is expected that after the technology bubble twenty years ago and the banking crisis in 2008, the entire global economy will now have to find itself in a “new” normality. The effects on all economies are assumed to be even more dramatic than anything seen before. Some media and experts even speak of a recession or economic situation compared to the years after the First and Second World Wars.

If individual industries collapsed after the events of September 11, driven by systemically important companies such as Enron or WorldCom, and the stock markets at that time supposedly plunged into deep abysses, in 2020 it is not individual industries but all areas of the economy that will be affected, and shareholders worldwide now know what real slumps in the high double-digit percentage range mean. Against the background of the events of 2020, the “crises” of the past decades seem like a “pony farm,” mind you, from an economic point of view, because the humanitarian disasters and fates have always been terrible and indescribable.

1.2 Inspired by the Burst of the New Economy Bubble

Restructuring, cost cuttings, and layoffs have replaced the exuberant and often irrational (investment) decisions of the “cyber economy.” The [Dot.com Economy and Cyber Commerce Reframing](#)¹ (CCR) have given rise to a number of impressive companies that would probably be described today as “disruptive” thought leaders. Hardly anything has remained of the positive mood of the late 1990s. The banking crisis has shaken the mistrust in the financial world, and in many cases, what has remained of former image-laden and glamorous companies such as Deutsche Bank² is nothing more than a bailout that has evaporated economically. For many companies of all sizes, it is now a question of survival. Global corporations that apply for state aid, such as Lufthansa Group³, demonstrate how thin the capital cover in companies has become in the meantime in the pursuit and the need for ever new products, new technologies with ever-smaller margins through an ever-stronger fight for customers and competitive advantages.

In these times, many companies are looking for ways to reduce costs. Template-based Management (TBM) as a management approach was not “developed,” but it was born out of necessity. In the first edition of this book in 2003, I was tempted to write that TBM was deliberately “developed,” but from today’s perspective, I would consider the term “emerge” more accurate.

1.3 About the Emergence of TBM

In the years before the first edition of this book was published under the title “Template-driven Consulting,” I was engaged as a consultant for many large customers. Topics ranged from process optimization, setting up completely new global departments⁴, program and project management in corporate development departments reporting directly to the CEO, to the design and implementation of completely new management approaches such as “Marketing Resource Management” at one of the largest German banks.⁵ I was referenced from one client to the next. As a small consultancy, it was of course not easy to hold my own against the big players in the market with all their networks and networks. Furthermore, every company knows how difficult and risky it is to build up a large team of employees for whom you are responsible, also, and especially in difficult phases.

¹Seebacher, U. G.: “Cyber Commerce Reframing—The End of Business Process Reengineering”, Springer 2002.

²https://en.wikipedia.org/wiki/Deutsche_Bank. Accessed: May 24, 2020.

³<https://en.wikipedia.org/wiki/Lufthansa>. Accessed: May 24, 2020.

⁴See the Allianz case study in this publication.

⁵Seebacher, U.G., Güpner, A.: “Marketing Resource Management—How Marketing Professionals Storm to the Top”. USP Publishing 2011.

My goal was therefore to play the game with the smallest possible but exquisite team. I still remember very clearly how I was busy recruiting new staff but was not successful. I was looking for a special species or competence, namely methodological and structural competence.

1.4 Getting Into Methodological and Structural Competences

Axel Guepner (2014),⁶ a former top manager in the financial sector and now a recognized consultant and career coach defines these two competencies as one of seven key competencies for perfect “employability.” Guepner bases his thesis on working together in and with TBM. He was one of my long-standing clients and companions who—according to him—benefited from my innovative consulting approach at the time. At that time, methodological science and structural theory were very young applied sciences. There was only a very small international community of organizational developers and competency experts dealing with these meta-competencies.

The term meta-competence⁷ originally comes from philosophy and defines an ability to deal validly with one’s own and other people’s competencies in order to develop a universal problem-solving ability based on this. The philosopher Kuno Lorenz defines the term meta-competence as an abstract and generally valid manifesto of the *knowledge by description* of the British philosopher, mathematician, and logician Bertrand Russell⁸ and the label or meaning defined by him. This term has a core function in the philosophy of language and linguistics. From today’s point of view, Russell’s work is currently experiencing an enormous renaissance,⁹ as research in information technology and especially in the field of Artificial Intelligence (AI) and, in this context, cognitive science is building on this knowledge.

The conceptual recognition as meta-competence also shaped the work of Friedrich Albert Moritz Schlick¹⁰ (* 14 April 1882 in Berlin; † 22 June 1936 in Vienna). As a German physicist and philosopher, Schlick was the founder and figurehead of the Vienna Circle¹¹ in Logical Empiricism. Although Schlick dealt with a wide range of topics in his work and his scientific philosophy, including natural philosophy or ethics and aesthetics, his theses in the field of epistemology and conceptual recognition are still considered the most significant today.

⁶Guepner, A.: “I Am a Star—Let me in! The career book for the perfect career start”. USP Publishing, 2014.

⁷Kuno Lorenz: “Dialogical constructivism”, de Gruyter 2009.

⁸https://de.wikipedia.org/wiki/Bertrand_Russell. Accessed: May 24, 2020.

⁹https://en.wikipedia.org/wiki/Artificial_intelligence. Accessed: May 24, 2020.

¹⁰https://en.wikipedia.org/wiki/Moritz_Schlick. Accessed: May 24, 2020.

¹¹Stadler, F.: “Der Wiener Kreis Ursprung, Entwicklung und Wirkung des Logischen Empirismus im Kontext”. Springer 2015.

Methodological competence *in the broader sense* includes the ability to obtain information, in particular, to acquire specialist knowledge, and to evaluate. Methodological competence *in the narrower sense* describes the ability to solve a problem or a situation in a goal-oriented way by applying relevant, contingency-optimal approaches, models, and concepts, especially by making decisions and setting priorities. Methodological competence *in the narrowest sense* is defined as follows on the basis of four competences:

- Procure, evaluate and select, validate, structure, process, document, and replicate information.
- To analyze, optimize, correctly interpret and present the results of manufacturing processes in a suitable form.
- Competence in knowledge, situational selection, and application of relevant problem-solving techniques.
- Competence in designing problem-solving processes, e.g., in project management.

1.5 What Means Capacity for Abstraction?

Against this background, it becomes clear that there must be a capacity for abstraction at the operational level in order to be able to identify and justify structural and systemic inconsistencies in the most diverse subject areas through the use of methodological and structural competence. The area of structural competence plays a very important role here. Structural competence¹² is necessary for the development and successful application of professional competence. It is therefore a competence that opens up competences. In the field of learning, the term “learning to learn” is used for this purpose—a key qualification or competence. In some cases, methodological competence¹³ is no longer defined today as a separate competence area in its own right, but as a cross-cutting competence and thus as a component of all other competence areas. Methodological and structural competence is considered an integral aspect of professional competence, personal competence, and social competence.

¹²Guepner, A.: "I am A Star - Let me in! The career book for the perfect career start". USP Publishing 2014.

¹³Liu, X.: “Linking Competence to Opportunities to Learn: Models of Competence and Data Mining (Innovations in Science Education and Technology)”. Springer 2009.

1.6 The Dual-level Coaching is Developing

At that time, many of the connections I am aware of today were not known and conscious. Over the many years, many feedbacks and reflections enabled me to recognize, through structural analysis, what I had done unconsciously at that time. On the basis of the feedback and the references, the workload became bigger and bigger but growing my team of consultants at the same speed was not possible. In countless recruiting interviews I realized that there was no such thing as the method consultant in the market, either the classic management consultant or the system analyst and coach, who again was not “crisp” and “down to earth” enough in most cases. I interviewed colleagues from a wide range of fields, including business administration, economics, psychology, education, IT, and personnel managers. But I never found the appropriate vertical and horizontal cross-sectional competence to fulfill my image of a method consultant at that time. Perhaps my demands were simply exaggerated, and I could not see the wood for the trees, for the abstraction, method, and structure.

So, I had to find a way to “multiply” myself so that I could serve all the customers. It was about finding a way to send the project staff in the different projects to a predefined process and to have to evaluate and control this process only selectively, so that the corresponding customer orders could be implemented with as little of my time as possible. Since I could not be present at the respective customer’s site during the entire project with my only 24 hours per day, I prepared a project plan. This I agreed with the project manager of the customer. Based on this, I developed the necessary templates for each work step and handed over this set of templates to the project manager. We went through these together to make sure that the process and the connections would be clear and comprehensible. We distributed the tasks and communicated the deadlines and the team was ready to go.

1.7 Why Thriving Facilitating Organizational Learning?

With considerably lower consulting costs, we were able to successfully implement countless projects of all kinds. My templates suddenly appeared in more and more departments of my client organizations and I realized what enormous potential template-based management had for companies in terms of organizational development. Our numerous project successes proved that the existing expertise in the organizations is sufficiently available to solve the respective challenges and problems. Only the necessary methodological and structural competence was not available in the organizations to use this specialist and expert knowledge in a targeted and effective way to solve the tasks at hand.

This fact led to the description and publication of the TBM approach to provide companies with a very powerful tool to carry out their tasks just as successfully and also much more sustainably, independently of external consultants. Consultants and agencies have long been considered indispensable. The system of consultants and agencies also fed itself by former consultants switching to client companies and

then commissioning ex-colleagues from these positions. As was already the case when the New Economy bubble burst or after the banking crisis, companies have to tighten their belts. This will also have an impact on agencies and consulting firms, because the mandate in companies is quite clear: to optimize internal value creation and no longer outsource services to external third parties, as Joel Harrison of B2B Marketing in London put it in a marketing podcast.¹⁴ He attested that we will have to deal with more and more in-house agencies and consultancies in the future, which will lead to consolidation in these areas.

Template-based Management (TBM) will be an essential tool for companies in this context, enabling them to successfully implement the necessary projects without the need for external agencies and consultants, or only with selective and cost-minimizing support. TBM relies on the effective and efficient tools of “coaching,” on templates, and on the knowledge and potential of employees to enable them to provide independent consulting services.

By applying the TBM approach, cost savings can be achieved in both the short and long term. On the one hand, TBM gives project managers the opportunity to not only directly support 10 to 12 people—as is common with traditional project management approaches, but to support approximately 35 to 40 employees on their own. This enormous improvement can be achieved by the fact that the project managers no longer deal with the operational aspects of the problem-solving process, but instead “hand it over” to the employees and provide them with tools (templates) to fulfill the tasks set. In this way, the expenses for project management can be reduced by 75%. On the other hand, the employees learn to provide internal consulting services. The sustainable learning process in terms of methods and structures that takes place in the company as a result of this will also have a positive long-term effect on the entire organizational development of the companies, because the inherent innovation and optimization power will also be positively influenced by this.

1.8 What Does the Methodology Look Like?

Template-based Management comprises four project phases:

- (1) Problem definition and understanding
- (2) Process development and abstraction
- (3) Generation of templates
- (4) Implementation of the project work

¹⁴<https://anchor.fm/b2bmarketingguidebook/episodes/Next-Generation-B2B-Marketing-featuring-Joel-Harrison-Editor-in-Chief-and-Co-Founder-of-B2B-Marketing-edn1kd/a-a24ehs3>. Accessed: May 24, 2020.

In phase (1) established methods of analysis are required to define and understand the problem to be solved. Depending on the nature of the problem, a problem-solving process is outlined. This process then forms the basis on which the TBM-experts decide which tasks to assign to the company's employees. Finally, the TBM-experts choose which tools they need to provide to the employees. This is already part of phase (2).

Phase (2) and (3) represent the theoretical and innovative component of the new approach, because it is about the abstraction of the process. All of these phases will be discussed in detail later in this book. However, phase (4) cannot be compared with conventional project management methods either, because the activities have to be carried out on the basis of the Dual-level Coaching Methodology (DLC), which will also be discussed in detail later in this book.

In order to develop the cost reduction potential of template-based management, TBM-experts—called *Templater*—no longer deal with the problem-solving process from an operational perspective. Rather, they enable the company's employees—the *Temples*, as the users of the templates—to perform operational tasks (such as sound problem analysis or synthesis) themselves, using templates that can range from simple Word documents to sophisticated spreadsheets. This approach makes sense, among other things, because employees tend to have good contacts with key people within the company. This means that a long period of relationship building can be avoided. The latter may also be more willing to pass on important information to “insiders” than to external consultants, who in their opinion may not have any knowledge of “their business” anyway. As a result, many potential obstacles to the rapid achievement of set goals, such as employee prejudice against outsiders, can be avoided.

What the Templater actually do is to *abstract* the problem-solving process. They detach it from its operational roots and view, and analyze the solution from a higher perspective, the so-called *meta-level*. They only intervene in urgent matters.

The so valuable, traditional but also expensive function of agencies and consultants to solve problems on their own is thus eradicated, and their role as content-oriented coaches becomes eminent. In Phase 4 the Templaters become *moderators* and the often praised but rarely achieved knowledge transfer between TBM-experts and the employees of a company takes place.

1.9 What Are the Benefits of TBM?

The main advantages of TBM are:

- (1) Reduced expenses for external services and suppliers of up to 75% in the short and long term.
- (2) Knowledge transfer from external service providers to employees of the organizations.
- (3) Promotion of structural thinking and working and “process thinking.”
- (4) Overcoming short-sighted and departmental thinking and behavior.

- (5) Motivation of employees through work expansion and work enrichment, driven by the operative implementation of problem-solving processes and the experience of coaching on two levels.
 - (6) Emergence of a change process toward a learning organization, as employees think more and more in terms of structures and methods, and this knowledge is applied to more and more specialist areas and topics.
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1.10 What Is the Conclusion?

Template-based Management enables companies to reduce their costs for external experts and to promote their development activities for their employees in a proactive, innovative, and cost-conscious manner. TBM is not the only key to minimizing short-term costs for external agencies and consultants but is also the driver for sustainable organizational development. By working with templates, structural and methodical thinking and acting will manifest itself in the employees. In this way, it will suddenly be possible to utilize the existing expertise in companies in a completely new way, because everything will be set up and implemented in a clean, stringent, and consistently methodically valid way. Thus, an inherent potential, a competence to recognize problems and weaknesses systemically from the inside and then to implement their solution or optimization methodically clean and structurally stringent.