

Leading with the Head and Heart

SECOND EDITION



*Embracing Passion and
Delivering Results*

Honesty
Integrity
Passion
Fulfillment
Professionalism
Results

Todd Archbold, LSW, MBA

Leading with the Head and Heart

Praise for Leading with the Head and Heart

“The act of learning about ourselves as a way to lead others requires a great deal of courage and humility. From the first chapter to the final pages, the concepts of courage, humility, passion and compassion are clearly and humorously defined by an author that has truly lived the experiences. Readers will quickly recognize themselves within the vignettes and will find the subsequent guidance both wise and applicable. This book and its lessons are both poignant and brief – never preachy. *Leading with the Head and Heart* is highly recommended for anyone looking to inspire engagement and growth in leaders and employees alike. This book really “gets it”, and will now be a cornerstone in our staff development meetings.”

Christopher A. Wall, MD, Founder – 4Giving.com

“This remarkably pithy book humbles me to read because I have actually had the privilege of “leading” Todd – although over time it became less and less clear who was leading who! A great outcome. This book is a clear-eyed report from lived experience – moments reflected upon, digested, and re-synthesized as broadly applicable insights. This is Todd channeled, arising from the kind of unflinchingly honest reckoning with himself, and the situations he found himself in, that a true leader must be able to face. There are many sentences in this book that by themselves could have a major impact on one’s work life and career and that, standing alone, would be reason enough to read this book. In a world crowded with career advice platitudes, this is a sparkling gem. And a tour de force.”

Stephen Setterberg, MD, Founder & President - PrairieCare

Praise for Leading with the Head and Heart

“Leadership can be some of the most challenging work we do in our lives. But it doesn’t have to be as hard as we make it. Todd provides simple yet thought-provoking practices through his stories and real life lessons. In the end, we are reminded reading *Leading with the Head and Heart* that being good leaders is centered more on “how” than “what” – how we interact and how we have conversations impacts our effectiveness as leaders more than execution of a great plan. The “how” starts with self-awareness and an ability to get over ourselves and I appreciate this book’s simplified presentation of how focus on what many consider to be “soft skills” is critical to the health of an organization and its teams.”

Andy Cochrane, CEO – *Maple Grove Hospital*

“*Leading with the Head and Heart* is a playbook that I’ve been waiting for. Todd shares a pathway for results with simplicity and life wisdom. It’s a perfect read for everyone from CEO’s to first time supervisors.”

Heidi Northrup, CEO – *South Lake Pediatrics*

“The concepts in this book are both practical and inspirational reminders about the fundamentals of leadership and one’s own continuous improvement. These ideas are helpful for school administrators, teachers, parents, and even students. Everybody has some aspect of their life where leadership skills matter and this book can help one develop those skills and it provides insight on how to apply them daily. *Leading with the Head and Heart* is a great way to frame the idea that our ability to truly lead relies on more than just logic or compassion.”

Cory McIntyre, Associate Superintendent - *Anoka-Hennepin School District*

Praise for Leading with the Head and Heart

"In *Leading with the Head and Heart*, Todd develops the concepts of understanding ones-self and the introspective process of exploring our intrinsic motivations and drivers to prepare us to utilize the toolbox full of leadership concepts artfully distilled and shared in these personal readings. Clearly, as a seasoned leader, Todd is looking to provide a resource to those whom are looking for a synopsis of leadership theory disguised as life lessons which will serve as a "coffee-table must have" on all leadership tables and which will have many a page corners folded in for reference."

Mike Phelps, President & CEO – Ridgeview Medical Center

"In today's world of leadership, one can easily get overwhelmed with the complexities and challenges. *Leading with the Head and Heart* strikes the needed balance. Its content provides a roadmap for success built on relationships, culture building, integrity, and an organizational atmosphere that both challenges its members and makes the challenges enjoyable. No matter where one is at in the leadership journey, this book seamlessly blends the needed theory and practical foundation for success."

Sandra Lewandowski, Superintendent – Intermediate School District #287

"*Leading with the Head and Heart* – does an exceptional job of bridging leadership theory with actionable practice while at work and in daily life. Everyone will benefit from the illustrations, anecdotes and frameworks contained with the book. I highly recommend this resource for those who need a road map for leadership exceptionalism or a recharge in their career sweet spot."

Dr. Scott Morrell, President – Rebar Leadership

Praise for Leading with the Head and Heart

“Todd is an amazing leader who embodies what it means to lead with the head and heart. He channels his passion for helping those challenged by mental illness, and is leading and guiding professional resources that have a very positive impact on the lives of these individuals. Through humility and vulnerability evidenced in his personal stories and by utilizing insights from society’s most influential leaders, Todd is masterful in identifying and sharing excellent principles, characteristics, ideas and advice about what it means to lead with one’s head and heart. In a clear and succinct manner, this book provides powerful ideas I believe through my personal experience will help leaders do great work in their communities – and be truly fulfilled.”

Brian Murray, CEO – *Ryan Companies*

“Serendipity – this is what I felt when I read, *Leading with the Head and Heart*. It came at such an opportune time for what I was looking for just at that moment. I have been in different leadership roles for almost 40 years. Emotional intelligence was not even a term when I went to graduate school for business. I learned that term and its importance from my son, out of college just two years, when we were discussing challenges in management. Leadership isn’t easy, but it is so rewarding when you see baby steps of progress with a tough project or beautiful growth in someone you are coaching (whether they know it or not). Thank you, Todd, for sharing your lessons and wisdom. I learn something new every single day. It is a joy to be where I am at and I highly endorse this book for both new and seasoned leaders.”

Corinne Abdou, President – *Kaleidoscope Health Systems*

Leading with the Head and Heart:

*Embracing Passion and Delivering
Results*

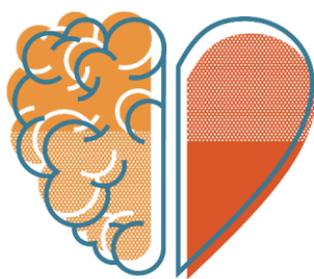
Second Edition

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Dedicated to all of my friends and colleagues
who inspire me to try great things.

A special thank you to Lora, John, Stephen,
and my amazing wife.

*“When you surround yourself with good
people, good things happen.”*

- Todd



Preface

It was *change* that sparked the passion to write this book. Throughout my career I had gotten used to the frequent changes that occurred in both education and health care. These changes ranged from new legislative actions and regulatory advancements, to tweaks in staffing models and care models. In addition to these common changes in my work environment, I had experienced significant changes in my personal life at work and at home.

The particular change I am referring to came in early 2018 when my role shifted from managing health care operations to business development. For years, I had really been doing both jobs – but now formally, and in order to leverage my strengths and grow our company, I would need to focus all of my time on new endeavors spanning from California to Switzerland. The most jolting part of this exciting change was giving up the 19 direct reports that I built close relationships with, the multiple service locations that I had been intimately involved in designing, and the hundreds of employees, and thousands of patients whom I had dedicated my work to supporting. I have always been a highly relational person, and my ability to connect with great people around me was both valuable and fulfilling.

I quickly began compiling all of the notes, slide decks, cheat sheets, and other helpful documents I had created over the years. At first it appeared that I would have a packet of information to pass on to my successor. Then, it grew into a robust manual. When the writing did not stop, it led to the culmination of *Leading with the Head and Heart* that

was first published in May 2018. This short book was a vulnerable display of my dearest thoughts as they pertained to leadership, values, and relationships. I was proud of the initial version, but my writing on the topic continued after its publication. For some reason, my thoughts continued to flow on this topic. It became clear that a future edition was currently in progress.

One summer day a friend asked me to write a brief story about an experience in youth sports that he could include on his website, called Linklete. The story was titled *The Plaid Speedo*, and it was a personal story highlighting a moment for me as a youngster that shaped my future growth as a leader. After writing this story, I was unexpectedly impassioned with having so clearly articulated an experience from nearly 20 years prior, and somehow making the connection to my life today. I instantly realized that the first edition of *Leading with the Head and Heart* lacked the necessary inclusion of a personal narrative and real-life experiences that could make a stronger connection with the theme of the book.

I was encouraged by friends and colleagues to write this second edition to elaborate on some of the original concepts. I took it upon myself to model honesty and candor by sharing more personal and intimate stories that help create a stronger link to my leadership values. My role and responsibilities at work and home will undoubtedly continue to change, and I look forward to the challenges that will help me become a better leader. Sharing our wisdom and experiences with one another is one of the noblest acts.

Contents

Introduction	1
Section 1: Character.....	5
The Plaid Speedo	6
Chapter 1: Show People Your Value	12
Chapter 2: Lead by Example	18
Chapter 3: Follow-Through on Commitments	27
Chapter 4: Be passionate.....	33
Chapter 5: Challenge Yourself Through Honesty.....	39
Section 2: Knowledge	47
The Morning Phone Call	48
Chapter 6: Leadership Styles	54
Chapter 7: Valuing Time	61
Chapter 8: Managing Change	66
Section 3: Wisdom	74
Summer Break	75
Chapter 9: Strengths & Gusto!	80
Chapter 10: Building Trusting Relationships.....	88
Chapter 11: Health and Self-Compassion	97
Chapter 12: Humble Learning.....	106
Chapter 13: Conscientious Decision Making	113
Conclusion	121
Resources.....	123
Urgent vs Important Tasks	124
The Johari Window	125
Decision Making Process	128
The Four Stages of Learning	129
Listen	130
Philosophical Razors	131
References.....	132
About the author.....	134

Introduction

Many great leaders have emphasized that in order to be truly fulfilled, we need to do what we believe is great work, and we must have the ability to do it well. While our work should not completely define our character, it will become a significant part of who we are and, in turn, our character will define how successful we are. Each day we are afforded finite time to accomplish, at sometimes, a seemingly infinite number of tasks. This includes time dedicated to work, family, personal care, and a growing miscellaneous list of other priorities. Leading with the head and heart is a practical way to leverage ones strengths to do great work and feel fulfilled.

The foundation for leading with the head and heart is understanding emotional intelligence, self-awareness, and compassion. For the past two decades the world's best business schools and teachers have emphasized the importance of emotional intelligence (EQ). When technical skills are equal, our EQ is often the intangible trait that allows us to stand out among our peers, to manage emotions, and to navigate complex social situations. Self-awareness means understanding our strengths and limitations. By doing so, we can leverage them to our advantage and to the benefit of those around us. This means that self-awareness is the critical component in positioning oneself for success. Lastly, compassion is our capacity to relate to a situation with sympathy, understanding, and honesty. It is our ability to be aware of

our biases and filters, and helps us manage our emotional and physiological state accordingly. While compassion is not the same as empathy (which can be an internalized experience), it does emphasize authenticity and showing others that we truly care.

This book has a combined focus on the aspects of both *leadership* and *management*, and it is important to understand their systems of action, purpose, and characteristics. There is a great deal of overlap between them, and neither is a replacement for, or better than the other. In general, management is about identifying and dealing with complexities. Leadership is about identifying and dealing with change. A balance of both are necessary for any healthy organization, and one without the other will surely inhibit success. The best leaders and managers are both wise and resilient. They learn from one another, and how to thrive with one another. The best of them demonstrate the rare and powerful ability to both lead and manage, with resulting success and fulfillment.

Leading with our head and heart allows us to embrace pragmatism and emotional intelligence to persevere in difficult situations. We all want to feel fulfilled with how we spend our time, and want to do things well. It is important that we develop habits that are both healthy and helpful. When we can demonstrate these habits consistently, we find ourselves functioning well in most areas of our lives.

The reality is that we are all beautiful yet imperfect beings. There are ways in which we can appreciate our flaws, acknowledge our differences and create success together,

in spite of any eccentricities that we previously viewed as barriers. Leading with your head and heart means being easy on yourself and having the ability to forgive. This short text is separated into three sections that provide value-driven principles and ideas for getting the most out of our efforts through meaningful and practical strategies. Each section begins with a personal story that has profoundly shaped my own personal and professional development.

The first section focuses on five core characteristics of leading with the head and heart, which are shaped by the following values: *honesty, integrity, passion, fulfillment, professionalism, and results*. These principles will increase effectiveness and efficiency, and subsequently maximizes all around use of our time (and time is our most precious currency). Developing and practicing healthy habits allows us to do better work, while at the same time reflecting positively on our character and intentions. We can be a leader by virtue of our formal title, or we can be a leader in how we behave and function within a team and among our peers. The second section highlights applied information that has developed into fundamental knowledge of good leadership. The third and final section then builds on that existing knowledge and applies sensible and applicable advice gained through experience and knowledge.

Advice is cheap, and so is this book. Some of the comments and anecdotes throughout are original thoughts, yet most are curated adaptations from the advice of others including many quotes from society's most influential figures. While I truly believe these are powerful opinions,

they are exactly that - opinions. We will undoubtedly be exposed to countless tidbits of wit and wisdom, and the values that we exercise each day will ultimately guide and shape us and how we make decisions. Leading with the head and the heart can help instill comfort and confidence in our daily routine. When the values and principles are genuinely embraced, it will further sensitize us to difficult situations. Even for the most experienced and wise leaders, tough decisions should always be tough. This book is not aimed at making tough decisions easy. It will teach us to manage tough decisions with integrity, not allow them to fester, and ultimately to make better decisions. This ultimately allows us to be more comfortable in tough situations.

We must work hard to build a healthy ethical and moral foundation so we can make purposeful decisions grounded in integrity. Strong ethics combined with self-awareness and a consciousness of our environment will allow us to pursue our mission with clear purpose. The following pages serve as a wellspring for us to begin to grow and nourish further wisdom together.

*“I've learned that people will forget what you said,
people will forget what you did, but people will never
forget how you made them feel.”*

- Maya Angelou

Section 1: Character

“Be more concerned with your character than your reputation, because your character is what you really are, while your reputation is merely what others think you are.”

– John Wooden

Our character is the foundation in which our successes are going to be built. This is the intangible and dynamic set of attributes that makes us both unique and great. We are born with raw personality traits that will be combined with our experiences and shape who we become. In many ways, we will become more polished yet boisterous versions of who we were when we were young. To know oneself is the essence of wisdom that will allow for happiness, self-control, tolerance, resiliency, and better decision-making.

The Plaid Speedo

“Winning means being unafraid to lose”

– Fran Tarkenton

It was easily one of the most vulnerable, humbling, and pivotal experiences of my adolescence. A rush of terror, and a gratefulness that would not be realized until at least a decade later.

For years leading up to this moment, I had enjoyed the camaraderie of playing basketball, baseball, and football with friends at the park as often as I could. I was a good athlete, but then again there were a lot of good athletes in my town. When I got to high school I chose basketball as my main sport, and quickly realized that I was one of the millions of teenagers who thought they were better than the rest. I was convinced that I was different – that I was the local prodigy who would be recognized for generations to come. When I failed to make the travelling team, and then sat the bench on the freshman high school team, I was devastated. I didn't even make it through the first season when I quit the team in haste. I was embarrassed, angry and very confused. All of this on top of the pressures facing an awkward prepubescent freshmen in a huge suburban high school.

After moping around for months and isolating myself from the basketball circle, my parents urged me to try a different sport. My older brother was on the swim team, but I was never interested in swimming back and forth in a pool all

afternoon. I knew a lot of his friends who were on the team, and the assistant coach also happened to be a family friend. Finally, I was convinced to go visit them at practice and learn more. Watching the swimmers go back and forth, back and forth, back and forth in the noisy and humid indoor pool only validated my disinterest. However, I finally looked past the swimmers and saw a handful of guys at the far end of the pool on diving board. Now that looked kinda fun!

A week later I was on the diving team, learning the basics of springboard diving – the approach, hurdle, and take-off. It was a thrill learning new tricks and flying through the air! I enjoyed learning the techniques that required concentration, core strength and athleticism that was truly a niche. After a few weeks of practice and numerous belly-flops, I had learned how to do a forward dive, and an inward dive – enough for the coach to enter me in the exhibition heat at the next competition. On the bus ride to the competition, I reveled in the excitement and intensity that the team shared getting ready to face their friendly-competitors. I was truly inspired by this group of boisterous yet humble athletes.

When we arrived to the pool, the team headed straight to the locker room to change – and the assistant coach stopped me to let me know that while they did not have a team speedo for me yet, they had what they called a “grab bag suit” for me. Up until this time, I had gone to each practice wearing a regular pair of swim trunks. This was the first time it occurred to me that I would have to wear a tiny, skin tight, spandex SPEEDO! My face turned bright red and

the shock of this reality triggered a rush of adrenaline! I was given a few suit options in my size, and in a strange effort to look calm and cool, I jokingly grabbed the most obnoxious suit that I saw – it was bright purple and orange with a plaid pattern. What was I thinking!?

I followed behind the team into the locker room in total shock. While the rest of the team changed and entered the pool for warm up, I paced back and forth staring at the suit... I tried it on, and took it off. Then I tried it on again. I had never worn anything like this before and the look and feel of this suit was completely foreign. I did not even know if I had it on correctly! Outside of that locker room were a hundred friends and strangers. Nearly 30-minutes passed when the coach came and found me, still in shock, and now totally embarrassed. I finally told him that I absolutely could not participate in the competition. I vaguely recall trying to persuade the coach that this was all a mistake, and that I was supposed to be on the basketball team and somehow ended up at the pool! While I don't remember what he said to me, I vividly remember a warm and reassuring smile that somehow exuded trust and instilled comfort. Whatever he said to me, it must have been compelling because the next thing I remember was standing on the pool deck wrapped in the team parka – underneath wearing a tiny, tight, spandex speedo that was purple, orange and plaid...

The diving competition is right after the 50-yard freestyle, so at that time the divers gathered by the diving board. While all the other divers were warming up, I remained motionless on the pool deck off to the side – still wrapped

up in the team parka. The moments that followed are ingrained in my memory forever. They called my name, “Todd Archbold performing a 101B forward dive pike position, degree of difficulty 1.3”. I stood there for what felt like an hour. Finally, under intense pressure, I unzipped my parka and stepped up onto the diving board in front of a hundred people while wearing a tiny, skin tight, spandex speedo that was purple, orange and plaid. As I looked up in terror from the diving board and into the bleachers, I realized something. I was the only one who seemed to care or even notice the purple plaid speedo. Everybody there was focused in anticipation of me about to perform. Nobody cared or even seemed to notice the one thing that filled me with fear. Upon realizing this and feeling my emotions subside – I performed what felt like the most graceful, uplifting, and glorious front dive that had ever been done!

As I emerged from underwater, I was met with roaring applause! I was overwhelmed with amazement and empowerment! My own teammates, coaches, the spectators, and even the competing divers were on their feet. While they were likely oblivious of my almost paralyzing terror – they all recognized the courage and hard work that it took to stand there and perform a front dive. In retrospect, I now realize that many of those onlookers likely shared that same feeling of gratification by being a part of my experience – by being supportive during a life changing moment of a youngster.

This was an absolute defining moment in my life that would shape my athletic career, boost my personal growth, and

my professional trajectory as a leader. This is what the great Fran Tarkenton meant when he said, “Winning means being unafraid to lose.” It was the exact lift that my ego and confidence needed, born of a place of utter vulnerability.

Over the next decade I would continue my diving career into college, and then into coaching. I would eventually coach 11 high school seasons earning “Coach of the Year” honors, and having the privilege to shape the diving careers of champions, most of whom were far more talented



than me. I eventually picked up other sports such as running and triathlon. Coaching led to teaching which then led to graduate school. Each new adventure had been inspired by a previous adventure. I learned powerful values along the way including integrity, discipline, and honesty. I also learned not to be afraid to fall down, and then the importance of getting back up again.

Standing there on that diving board in front of all those people, while wearing the purple plaid speedo created a feeling of intense vulnerability, followed by overwhelming trust and empowerment. It would not be the last time that the feeling of wearing a plaid speedo for the first time would overcome me either – in fact, it was a feeling that I would experience in some of the most pivotal moments.

Leading with the Head and Heart

I am not sure what other context could have safely created that situation for me, but it taught me to face fear, take risks, and to trust in others. I am so grateful to our coaches, my teammates, and our fans that day. I am encouraged to know that everyday other kids and adults alike are having similar experiences of vulnerability and trust that will shape their futures for the better. I was never going to be a professional basketball player, or an Olympic diver. However, participating in those sports in a safe and supportive atmosphere allowed me to gain experiences that have shaped who I am today, and who I hope to be tomorrow.



Chapter 1: Show People Your Value

“Hide not your talents. They for use were made. What’s a sundial in the shade?”

– Benjamin Franklin

You need to bring value to your job, your role, and your life – every day. Chances are you are already creating value and you need to understand the potential of that value and share it with others. If you do not see it, look deeper or look at your work through a different lens.

How are you making a difference every day?

Are you authoring important policies that shape organizational behavior? Are you nourishing a positive work environment? Are you performing invaluable data analysis?



Show People Your Value

The intent is not to brag or inflate one's confidence, but rather to create identifiable contributions that can be capitalized upon for the furthering of a shared mission. By doing so, our work will become more powerful and meaningful to yourself and those around you. This can also help identify further opportunities for you and your team. Overstating your value is off-putting, but failing to identify your value is wasteful. *It is not about what you have done in the past, but what you can do in the future.* Confidence can be a powerful thing, but it must be balanced with humility. Arrogance alone may lead to some isolated accomplishments, but for the wrong reasons and they will not last. Arrogance combined with ignorance is simply dangerous. *There is a fine line between confidence and arrogance.*

There is a theory in psychology called the Dunning-Kruger Effect, which explores a cognitive bias between individuals with lower and higher competencies. According to the theory, those with lower competencies lack the ability to assess their own inadequacies therefore often overstating their abilities. They are also less likely to accept feedback and constructive criticism. Conversely, those who are more competent may underestimate their own abilities by presuming that tasks performed are similarly easy for everybody. Interestingly, the original hypothesis was that people at all performance levels are equally poor at estimating their relative performance – which has been repeatedly confirmed through numerous ongoing studies.



Show People Your Value

Be aware of this potential bias, and spend time understanding your strengths and areas of struggle. Tremendous insight can be gained by talking with trusted colleagues and those closest to us. Our own awareness of abilities and our degree of humility will impress upon others. Consider taking the StrengthsFinder™ self-assessment, or use the Johari Window exercise with colleagues to gain deeper insight into our blind spots.

There may be specific valuable elements of our work that are discrete to many, and those are the elements that we may need to more outwardly share with others. However, there are also things we can do every day that pertain to all aspects of our work and that of others that do show value.

Below are some practical daily habits that both leaders and managers can exercise to emphasize ones value:

- 1) Showcase your successes.** This may be done through an email, publication, press release, or poster. When we create things of value, we should show them to others. Every day the efforts of geniuses go unnoticed because nobody was made aware. Our successes may provide additional value in ways others may help us understand.
- 2) Dedicate time and energy to your ongoing development.** This will both keep us humble and stimulated by new information and possibilities. If



Show People Your Value

we believe that we have nothing else to learn in certain areas – our skills will soon become obsolete. More alarmingly, this lack of humility will be off-putting to others and will limit our potential.

- 3) **Pay attention to details when writing and speaking.** Grammar, punctuation, semantics, and use of colloquialisms can be a reflection of our character. In writing, they can be a formal and indelible reflection on one's intellect. When speaking, words can be a powerful illustration of our values. In a similar vein, we should not pretend to understand fancy words that shape concepts. Rather than naively agreeing with a statement or idea that we do not understand, ask for clarification. Our humility will actually build trustworthiness, while feigning agreement is an injustice to the relationship.
- 4) **Finalize your work with quality craftsmanship.** When creating important documents, convert them to a final format (such as PDF). They look more professional and do not allow others to modify our work. Make sure to save files with descriptive, succinct, and professional file names. Use a heavier weight paper or nicer stock for important printouts, and bind them with sturdy materials.
- 5) **Triple check name spellings and titles.** Even if you are not bothered by having your name misspelled, many others are - and they may not tell you. Your



Show People Your Value

careful attention to these details will be impressive to others.

- 6) **Spend your time on important things, and make sure to do them well.** Being busy is not the same as being important. Anybody can simply be busy. Important people do important things, they are not just busy. In addition, the definition of important may be contextual, based on the person and the time. During the workday, compiling a report may be the most important task, however, in the evening spending time with family and loved ones may be most important.
- 7) **Send and receive electronic information with care.** Email communication and social media can be easily abused, and by nature is indelible. Share and send clear information with the correct people. Make a distinction between which information is appropriate for electronic submission, and which should be shared in-person (or not at all).
- 8) **Understand that we build "trust stock" with the people around us.** We gain stock when we demonstrate kindness, trustworthiness, and helpfulness. This will afford us the benefit of the doubt in future situations. However, this stock can be depleted or lose value over time if we do not demonstrate consistency. Trust stock should not be confused with a mentality of *quid pro quo*,



Show People Your Value

which is simply exchanging favors. Our trust stock should be considered intangible and incredibly valuable – and managed with great integrity and ethical considerations. We cannot do everything alone, so it is important to have this investment if we ever hope to rely on others.

- 9) Be clear and direct in your communication with others.** We should not assume that people know what we are thinking, or even that they agree with us. We need to let others know specifically what we can do for them, and what we may need from them. George Bernard Shaw said, "The single biggest problem in communication is the illusion that is has taken place." Check-in with others often, and ask them to share their understanding.

We must consistently demonstrate our values and show people that we care. If we only show value and perform well sporadically or when people are watching, we will find that people will not count on us. This may also weaken our character and preclude us from future opportunities. Every single person has extraordinarily valuable talents to offer to the world. What a shame if they would not be recognized.



Chapter 2: Lead by Example

“Our greatest glory is not in never falling, but in rising every time we fall.”

- Confucius

A strong factor of both job satisfaction and team performance is the demonstration of *idealized influence*. Employees consistently rank this as one of the most important job satisfiers – those who experience themselves and others leading by example are creating an idealized influence in the workplace. As leaders, it is important to show those around us that we understand and appreciate the work performed together and that we are willing to contribute on all levels, at any time.

Leading by example reinforces our individual mission, vision, and values while building strong connections among colleagues. Although the benefits may not be visible at all



Lead by Example

levels, a lack of leading by example is very apparent and detrimental. Good leaders show others they understand and care about the work going on around them. This leadership characteristic may be the biggest determinant of success or failure. Abraham Lincoln once said, “If you want to test someone’s character, you should give them power.” Our actions impress upon others more than we may be aware, but our actions as leaders are all the more noticeable, for which we must always be mindful.

Great leaders develop an appreciation for discipline, but without compromising flexibility and adaptability. This means being punctual, courteous, and prepared. Their words match their actions, and that predictability builds trustworthiness. We should also practice how to complement discipline with levity so that we can effectively balance the weight of serious and stressful matters.

A simple example of this type of flexible discipline is one’s ability to lead an organized and productive meeting. Demonstrating discipline includes starting a meeting on time, having a clear agenda, guiding the discussion, and allowing for equal input from all members. An effective leader will also be able to pivot in certain areas to maintain discipline while capitalizing on opportunities that may arise. This may include spending time on topics that were not originally on the agenda, or allowing for more discussion on a topic than anticipated. Allowing a meeting to carry-on unorganized is frustrating, but to ignore a



Lead by Example

potential opportunity for the sake of rigidity is the epitome of foolishness. Establishing and modeling effective meeting norms will create much appreciated predictability and respect (more on this in Chapter 7).

There can also be utility in more rigorous discipline in certain situations. A Ulysses Contract is a decision that one makes freely, but it is intended to bind oneself in the future. This term comes from the pact Ulysses made when his ship voyaged near the Sirens in Homer's poems in the *Odyssey*. In the story, Ulysses tells his crew in advance to tie him down and put wax in his ears so he would not be rendered incapable by the Sirens' song. This concept is often used in health care (such as with advanced directives), and even in our personal lives. This is a more extreme form of discipline that while incorporated sparingly, may prove valuable in situations we might anticipate future problems. The strict principles of a Ulysses Contract may be useful when creating critical timelines, especially if there are dependencies in place. This type of conviction in the workplace can be admired, as long as it is not mired with stubbornness.

Caligula was the notorious young Roman Emperor who ignorantly stated, "Let them hate, as long as they fear". His leadership style was brutally autocratic and he believed that his actions did not matter as he had absolute inherent power. However, lest anyone wish to emulate Caligula, he was eventually murdered by his own personal guards. He



Lead by Example

lacked any awareness of the value of leading by example or the value of serving his people.

We often hear some of the best leaders say they strive to lead by example and always do what is right, even if it is not popular. Sentiments like these are sometimes accompanied by a sense of martyrdom such as not caring what people think of us. While the value is seemingly altruistic, we must also be honest with ourselves in that we do indeed care what people think of us, even if we say we do not. Therefore, for the sake of our own wellness and self-compassion we must balance doing what is right, and maybe not popular, with extraordinary efforts of leading by positive example.

Below are some powerful ways in which we can all lead by example each day:

- 1) Listen and be present.** Our level of authenticity is noticed and appreciated on many levels. Leading by example means doing so through our cognitive, emotional, and physical presence. We must always be aware of our body language. Look people in the eye when communicating, put down your phone, and continually acknowledge others with meaning. Pay attention and genuinely strive to understand context. Avoid interrupting others and share airtime. Using tactics such as occasionally paraphrasing important parts of a conversation or repeating important terms will show we are truly



Lead by Example

paying attention. This will keep us engaged and they will sense that sincerity.

- 2) **Fix small problems before they become big problems.** Seldom do problems solve themselves or simply go away. Even if they do go away, any ignorance or avoidance of the issue will be noticed, even if on a subconscious level. A leader who avoids problems will erode trust and create frustration and helplessness among a team.
- 3) **Help to identify root causes and possible solutions.** Many people are good at discovering problems, but few are gifted at understanding the cause of the problem. The value of a mechanic is not to tell you that something is broken, but rather to help fix it. Individuals need the ability to play a variety of roles in problem solving situations, including being the "devil's advocate." However, we must also demonstrate an ability to contribute towards finding solutions and being positive. When we just identify the problem with no solutions, we have created a "problem bomb" which we then expect others to diffuse. This is exhausting for others and will make you appear negative or uncooperative.
- 4) **Do not gossip.** This will ultimately be a greater reflection on the gossiper, than those that are gossiped about. Gossiping is by nature negative and often hurtful, and will erode one's



Lead by Example

trustworthiness. Other people will soon begin to wonder what you say about them when they are not present. Nobody ever got taller by making somebody else feel smaller. There is never an honorable reason to tarnish a reputation – yours, theirs, or mine.

- 5) **Be on time.** This includes being on time for work meetings, medical appointments, dates, and holidays. When you are consistently late, it shows others that we do not value their time. Even worse, it may signal to others that our time is more important than their time. Punctuality is a lost virtue, and will be strongly admired.

- 6) **Demonstrate the ability to manage ambiguity.** Most people struggle with plot holes and uncertainty. We have tendencies to fill in gaps that exist within information or data sets with whatever is convenient or pleases us (often unaware of our biases). We should acknowledge ambiguity and chart a path for the team to gather real information, so we avoid filling in gaps or spiraling into speculation. The best leaders are able to accept ambiguity and even thrive under those circumstances. Ambiguity requires heuristic problem-solving capabilities which allows us to tap into our creative side. Resist rejecting ambiguity as a problem and embrace it as an opportunity that naïve leaders tend to avoid.



Lead by Example

- 7) Avoid absolutist or black-and-white thinking.** *The wiser you are, the grayer the world becomes.* The frequent use of absolutisms (i.e. always, never, everybody, nobody) will distract us from actual data, or the absence thereof. Often times one's use of these terms may be that their emotions regarding the topic have overshadowed objectivity. There is a big difference between "always" and "90%". We should not allow insufficient analysis to be simplified by absolutisms.

- 8) Language and words shape how we behave.** The words we use each day and how we use them shape the impression that others have about us. Whether we use big words or small words, dirty words or clean words, the language we use is a reflection of how we think. The verbal habits we develop also have an influence on how we behave. We should use words appropriately and in context while avoiding using words that we do not understand. This can be either highly embarrassing for you, or condescending to another. There are nearly 7,000 languages spoken throughout the world, and each has different linguistic rules and patterns. Specific words translated to another language may actually carry different meaning. Even within a single language, there may be nuanced dialects that one should be aware. A "title" in the US often refers to the name of one's



Lead by Example

job, whereas “title” in the United Kingdom may refer to one’s marital status. Speak wisely and with careful intent.

We should never underestimate the power of our words and actions, especially when in a position of relative authority. We may never get feedback on how those words or actions have impacted another person, but we must be aware that they carry power. Neuroscientists have shown that our words and actions have a powerful impact on the biochemistry of others. When we behave in a frazzled, disorganized or distracted way – it is noticed by those around us, and it affects their attitude and how they respond to us.

The discovery of mirror neurons in primates in the 1980s helps explain our innate ability to empathize and really “feel” another’s emotions based upon pure observation. Mirror neurons are likely why we wince when we see somebody get a paper cut, or why we yawn when we see another yawn. We have an amazing innate ability to notice other’s emotional state, whether we are consciously aware or not. This is especially true of animals and pets which have an uncanny ability of noticing our stress levels, even when we do not.

Our reputations can be shaped with a few big wins or failures. However, our character will be shaped by our daily response to the hundreds of situations in between them all.



Lead by Example

As noted previously in Maya Angelou's quote, we need to understand that our words and actions will shape how others feel about us and often the world around them. The best leaders demonstrate accountability for how their words and actions influence the impression and response from those around them. The reality is that we learn from both great leaders and horrible leaders. We can choose to emulate the values and behaviors of the great leaders, and avoid the mistakes of the horrible leaders. The learnings from horrible leaders can leave deep wounds and catalyze visceral reactions to future situations (sometimes characterized by transference or even trauma). In contrast, great leaders will instill teachings that inspire positivity and confidence.



Chapter 3: Follow-Through on Commitments

“The most effective way to do it, is to do it.”

– Amelia Earhart

Perhaps the simplest yet most powerful characteristic of an effective leader is their ability to follow-through on commitments. This is the best way to build trustworthiness and gain the confidence of others. We should show people that we are smart through our actions and performance, not just by saying smart things.

Establishing our character as somebody who is reliable and dependable will create a solid foundation for trust and effectiveness. Our reputations will develop as a shadow of our true character and intentions. We will build strong relationships and others will seek our participation in projects and share opportunities. This ultimately creates efficiency and is essential for progress.



Follow-Through on Commitments

In contrast, failing to follow-through consistently, even with small tasks, will erode our credibility and integrity as they are experienced by others. If we only follow-through when others are watching, people may begin to question our integrity. The perceptions of others in these situations will eventually become their reality. Leverage your strengths to create reliability and then revel in their impact.

The following are habits that powerful leaders and managers can demonstrate to instill confidence in others. This shows our ability to follow-through on commitments:

- 1) If we say we are going to do something, then we should do it - or we should not have said we would.** Again, we have a finite amount of time to manage everything in our lives. This means that we need to focus on things that are important. If it is not important, then we need to consider carefully if we should be doing it. Please note, some things may not seem important to you, but may be important to somebody else. This makes it important.
- 2) Schedule tasks in your calendar so you have time dedicated to completion.** This will ensure time to focus on that task. To-do lists may work for some, but they still rely on the time being made available to address those tasks. When we dedicate specific time for tasks, they become more meaningful. If



Follow-Through on Commitments

the task does not warrant being scheduled, then we may need to consider delegating that task to another.

- 3) **Take notes and organize information.** Our strategies for storing important information may differ, but we know that by taking notes we are more likely to remember things. The act of jotting down important comments and follow-ups during meetings also signals to others that we are paying attention.
- 4) **Do not fall victim to the fallacy that we can multi-task.** It has been proven numerous times we can only perform one task well at a time. Focus on one thing at a time, and make sure to do it well. When we try to manage numerous tasks at a time, the quality of our work on each of them suffers, and our distractedness will be draining. When attempting to multi-task in group settings (meetings or conference calls), our inattention will undoubtedly be noticed. Attempting two tasks at once will take 150% longer than doing them separately, and the quality will suffer for both tasks.
- 5) **Reduce or even eliminate distractions.** Turn off email and text alerts and even hang a sign that says "do not disturb." An open door policy should be translated figuratively, not literally. The policy is a metaphor for being available and approachable,



Follow-Through on Commitments

not that we can be disturbed at any time. If we are truly leading by example and demonstrating strong values, a closed door does not mean we are not approachable. Use your door (or headphones, etc.) when it makes sense. Your value-driven-actions of leading with the head and heart will still make you approachable. Schedule your availability and show others that you value both your time and theirs.

- 6) **Check-in with others often.** Provide status updates, and verify progress on tasks and projects. We should not assume that others understand our unique vision. We need to communicate our vision clearly and with passion. We may need to operationalize this vision and even translate components so that we can invite the help from others. Exercise humbleness and consider others ideas – even if at first we may disagree. We must also be sure to demonstrate authenticity when checking-in with others.

- 7) **Take ownership of team performance.** At times it can be easy to quietly take a break from progress because we are waiting on somebody else. We may be fully aware of a contingency that has not been assigned to us specifically, yet we do not act. This is the sucker’s choice. While we do not want to enable another’s lack of follow-through, we should be aware that a team will succeed or fail together. When able, we should be willing to meet



Follow-Through on Commitments

others more than halfway when necessary. Performance issues can be addressed at a different time, but we must reject complacency as an option. Take ownership and coach others rather than avoid uncomfortable conversations. The latter will surely result in everybody failing. Michael Jordan famously said, “There is no ‘I’ in team, but there is in win.”

- 8) Be aware of others’ needs.** While we strive to focus our time on important tasks, we must also understand that there are some things that may be important to others, but not as important to us. Develop relationships so that colleagues can be open with us when they need something, and not be too timid to remind us if we forget. When we focus our time and success only on the things that matter to us, we are seen as selfish or obtuse.

Wise leaders understand they must first work hard, to eventually make that same work easier. This means spending time and energy doing tasks well, so that in the future we will see ongoing benefits of that hard work. This may mean working rigorously to design a complex process that will save countless hours of staff time later. This type of commitment can be seen as quite selfless as it is to benefit the team or a group at-large. We should not let our stubborn pride get in the way of achievements. This means that even though we may feel a certain task or project is not our responsibility, we should be compelled to still help



Follow-Through on Commitments

for the sake of the team. As mentioned in previous sections, this is not to enable inefficiencies, but to progress together. Performance issues should still be addressed, but may be done better in a different context.

If those around us do not feel we are able to follow-through with commitments, it will become apparent because they will stop asking us for input and participation. We will undoubtedly see our responsibilities dwindle, relationships decline, and our career trajectory stifled. The spirit of this text is to amplify the importance of spending our time wisely by developing healthy, productive habits – and that accepting reasonable tasks and following-through on them is rudimentary to fulfillment and success.



Chapter 4: Be passionate

“Success is no accident. It is hard work, perseverance, learning, studying, sacrifice and most of all, love of what you are doing and learning to do.”

– Pele

Passion is an essential ingredient in success. We cannot bake a good cake without eggs, just as we cannot create success without passion. Our greatest work in life will develop within the ethos of passion. This is something that cannot be learned, and it cannot be feigned. It must be real and it must be present, for the lack of passion creates a lack of purpose. When we are passionate about something, we should share that passion with others.

It was said by T.S. Eliot, “It is obvious that we can no more explain a passion to a person who has never experienced it



Be Passionate

than we can explain light to the blind.” Use your passion to inspire others, create excitement and in turn help others to find unique passions themselves. This will have a lasting impact, an impact we will likely be remembered for. Without passion, ideas sit idle while performance and satisfaction fade.

There are few forces more powerful than an individual who is empowered to make decisions and free to act from a place of true passion. As mentioned previously, in order to be truly fulfilled and find meaning in your work and life, *you must be passionate.*

Here are some things we can do every day to tap into the value of our passion:

- 1) **Passion is tangible energy.** Passion is not soft, fictitious, or immaterial. It is real, contagious, and quantifiable. Use passion to reinforce authenticity and to convey energy and enthusiasm that cannot be captured in words alone.
- 2) **Focus our efforts on what we do well – in the areas in which we can make valuable contributions.** It is easy to be passionate in areas in which we naturally excel. When we are passionate about something, we will demonstrate this through unconditional care and it will most likely result success. When we feel passion for



Be Passionate

something, it is an inherent sign that it is important to you, and probably others as well.

- 3) Strive for excellence and take the time necessary to do truly outstanding work.** For example, take the extra time to proof a document, draft a nice cover page, and print it on a higher quality paper. When we demonstrate a commitment to quality and performance, we will engage our passion and others will notice. The product of our work will memorialize our values, and when done well it will simply reinforce our passions which we can then apply to future work.

- 4) Do not overcommit at the cost of diluting your passion.** *We cannot do everything, even if we want to.* Some individuals are genuinely interested in almost everything and are able to contribute in many areas. However, those individuals may eventually suffer from passion fatigue, and areas which used to bring joy may begin to feel like rote tasks. We must learn to know our limits so we can ration our strength and passion where it can truly shine. Learn to identify the difference between things that you find interesting and things that truly excite you. Our strengths are the areas that are exciting, valuable, and that we do well. The things in life that are simply enjoyable may be better categorized as hobbies.



Be Passionate

- 5) **Find ways to share your strengths with others through teaching or coaching.** Being passionate about something is an intangible quality that can be easily and spontaneously modeled. We may discover deeper satisfaction in inspiring others to do great work, which in turn will refuel our tank. There are few joys in life greater than knowing that you are passing on wisdom, imagination, and energy to future generations. Teaching may be one of the most noble of the arts.

- 6) **Practice resiliency throughout the day.** We cannot prevent all bad things from happening, and when they do, we should be prepared to the extent possible. This means building confidence, establishing trustworthiness, and fostering a positive support system. Being passionate will catalyze our resiliency when we need it the most. Being passionate also means being vulnerable. Resiliency is also a counterbalance to vulnerability, which is also necessary.

- 7) **Incorporate discipline into our daily habits as a way to fuel your passion.** Discipline as a virtue will be respected and, by demonstrating that virtue in practice, you will reinforce its importance and value – thus fueling your passion. The greatest athletes leverage discipline in their training and performances that go along with their fiery passion to win. Endurance athletes in particular learn to



Be Passionate

tolerate sustained discomfort as a means of improving overall performance. As in many situations, oftentimes the greater the challenge, the greater the reward. When it comes to seeking meaningful success, nothing easy is worth doing.

- 8) Model vulnerability that can be fortified by passion.** The best way to gain trust is to give trust. Similarly, our willingness to be vulnerable will allow others to do the same. Moments of profound veracity necessary for progress can be realized by becoming vulnerable.

Simon Sinek is an expert on understanding and articulating positive leadership and engagement. A core part of his theories hold that in order to truly be engaged, we must understand not just what we do and how we do it, but rather *why we do it*. His presentations charismatically illustrate what this means on a practical level, and how we can all benefit from leveraging *why* we do something.

We should consider our passion as one of our most powerful tools, both for ourselves and for those around us. Passion is tangible energy that can be contagious. The best leaders understand that authentic passion inspires and motivates those around them. This will reinforce idealized influence, commitment, and value. Understand that while you can model passion, it cannot be easily taught to another. It can, however, be leveraged as a tool to emphasize our teachings. If you find you are not passionate



Be Passionate

about something, do not force it if it is not there, and that is ok.

Ralph Waldo Emerson once said, “To be yourself in a world that is constantly trying to make you something else is the greatest accomplishment.” If you are truly passionate, your authenticity will show naturally.



Chapter 5: Challenge Yourself Through Honesty

*“Whoever is careless with the truth in small matters
cannot be trusted with important matters.”*

– Albert Einstein

Honesty is an essential component of integrity and is a building block of trustworthiness. Honesty can be leveraged well beyond the virtue of being truthful. Leaders will be influenced by diverging opinions, conflicting interests, external pressures, and their own experiences. Honesty is the one virtue that can help a leader see beyond these influences and do what is right, and what is best. It also embodies one’s ability to communicate well and remain humble.



Challenge Yourself Through Honesty

When we are not honest with one another, it means we are also not honest with ourselves. Whether you are telling a “white lie” to a friend or committing perjury in court, you have somehow convinced yourself that it is acceptable, or “for the better.” Deep down this likely feels crummy and undermines all the other positive leadership virtues that we embrace. Use honesty as the mechanism to avert pressuring influences and to constantly challenge your own decisions. Mark Twain once said, “If you always tell the truth, you never have to remember anything.” Consistent and compassionate honesty will impress all those around us in ways that cannot be measured.

Our degree of natural honesty has been shaped over our lifetime and has been influenced by our relationships and experiences. We can consider the following values to continue to increase our degree of honesty:

- 1) Speak about others as though they are in the same room with us.** This age-old wisdom keeps us honest and reinforces the professionalism and strengthens our own positive reputation. We should avoid making comments about others that we would not want them to hear, especially without context. If the comment is a constructive criticism they should hear, we should talk to them directly. Rarely are these types of criticisms appropriate for public discussion. If you have a thought or comment that is not constructive in nature, there is no value in sharing it aloud (see



Challenge Yourself Through Honesty

aforementioned comments on the detriments of gossip).

- 2) **Assume that anything we type or write could be printed in the newspaper.** This will ensure we are professional in our communications and will mitigate the risk that what we type or write will come back to harm our character or reputation.
- 3) **Interpret and analyze information objectively.** We all process information through personal filters and biases. We should be sensitive to the vulnerabilities of our own objectivity. Occam's razor is a problem-solving principle reminding us that when numerous answers or explanations exist for a problem, we should consider the one with the fewest assumptions. This razor can help lessen the influence of our internal filters and biases. We need to be aware of the reinforcing influence we have created within our social network that may inhibit our awareness of how others outside our social network may process the same information.
- 4) **Strive to understand another's point of view.** This skill is required to engage in truly authentic and constructive conversation or debate with one another. We should do this both in the context of specific situations, and as an exercise done on our own time. We should identify high-stakes issues and be considerate of numerous viewpoints. We should be aware that most opinions are shaped



Challenge Yourself Through Honesty

through unique and individual experiences, and often over the course of many years. While we may never be able to truly understand another's point of view or their emotions surrounding a specific issue, our ability to accept this type of dissonance is a critical component of our self-awareness.

- 5) **Be strong enough to apologize.** One of the most important qualities of a leader is the ability to admit fault and acknowledge mistakes. Contrary to popular belief, this is not a weakness, but rather is a strong example of insight, trustworthiness, and respect for others.
- 6) **Rarely are the words we use neutral.** When we feel passionate about something, we are likely to use adverbs and adjectives that are persuasive in favor of our own opinion. We are also likely to emphasize the points that support our own opinions, or omit certain points or even facts. Be aware of this subconscious and biased tendency. Leverage your honesty in a positive and transparent way.
- 7) **Share relevant stories and anecdotes objectively.** When we are sharing a story or recapping a conversation, we should not impersonate another's dialogue or mannerism with sarcastic impressions. Out of respect of that individual and our own professional reputation, we should speak objectively and without exaggerated bias. When



Challenge Yourself Through Honesty

we do this we risk seeming like a fool or simply being seen as a jerk.

- 8) **Understand that we make decisions each day that WE feel are best decisions.** With billions of people in the world, there are millions of diverging opinions. The *fundamental attribution error* explains that we have a tendency to believe the actions of others to be a direct reflection of their character, regardless of the circumstances. In contrast, we believe the decisions *we* make are influenced by an incredible amount of objective information and special circumstances, of which we are intimately aware. In the same regard, we often naively attribute others' decisions to simplicity, and that a single action is representative of their entire character. We should have respect and empathy for the decisions others make and understand that they too are dealing with timely information and unique circumstances of which we are likely unaware.

- 9) **Develop a keen ability to understand data, and its relevant meaning (if any).** This includes statistics, graphs, trends, and even qualified statements. In many cases, we cannot manage what we cannot measure. Data can help us counteract the ignorance of absolutist statements, thereby allowing us to understand nuances. Data can help refine our personal understanding of the meaning



Challenge Yourself Through Honesty

derived from studies and debunk myths. A simple time study using a log is a great example of a practical exercise that can provide objective data to help ratify how we think we are spending our time. Data collection and analysis can be deceiving unless we truly understand the underlying methods. It has been often said that *there are such things as lies, damned lies, and statistics*. An example of this is the now historically infamous “Dewey defeats Truman” headline from the 1948 Chicago Tribune that erroneously predicted election results using unwittingly skewed data.

Challenging oneself through honesty may be the most profound principle within this text, as it presumes we may all have tendencies to be dishonest in certain situations. If we can humbly agree with this statement, we will be far more successful overall by virtue of being aware of our biases and filters. Perceptions can be driven by context and honesty. Oftentimes one’s perception may become their reality.

We should have the courage to participate in crucial conversations with others and ourselves so we can overcome obstacles. If we operate from a place of honesty and integrity, we can have confidence that we will all be successful in the end. This does not necessarily mean “winning,” but it does mean progress for our team and feeling good about our work. Those obstacles can then be identified and we can begin to work on them.



Challenge Yourself Through Honesty

Often times the obstacle that is preventing progress is our avoidance of a crucial conversation or necessary confrontation. The authors of the book *Crucial Conversations* define these situations as having three ingredients: high stakes, opposing opinions and strong emotions. It is in these most trying situations that our passion and honesty will be challenged the most. Leading with the head and heart means simultaneously having the courage and willingness to be vulnerable in these situations.

When we begin to feel too comfortable in our daily roles is when we may be most susceptible to regression or even complacency. This may be the idiomatic “calm before the storm”. While we need to pace ourselves and our workload, we also need to remain aware that there are always areas of our work and daily routines in which we can improve through change or hard work.

These types of obstacles can be avoided through challenging ourselves with honesty. For example, we can ask ourselves some of the following questions in a truly authentic way:

- 1) How are things *really* going?
- 2) What projects have we been putting off or avoiding?
- 3) How are the team members *really* feeling?

We should not fall victim to the fallacy of terminal uniqueness. This is when a team chooses to accept a belief there are aspects of their composition that is so truly



Challenge Yourself Through Honesty

unique that they cannot be compared to any others. Challenge this type of thinking with honesty so we can move beyond those artificial barriers and keep teams moving forward. Our awareness of this fallacy and acknowledging it with others will showcase our EQ.

Section 2: Knowledge

“A person who won’t read has no advantage over the one who can’t read.”

– Mark Twain

We all have a right to basic knowledge (facts, information, descriptions, etc.), but it is a privilege to be able to exercise our knowledge for the benefit of others. Epistemology is the study of knowledge in regard to its method and scope, to include how knowledge is acquired. Knowledge is power and serves as a prerequisite for wisdom. To assume knowledge, or take one’s intelligence for granted is foolish and wasteful. Embrace your knowledge, grow its base, and leverage it for better results and outcomes.

The Morning Phone Call

“The difference between trying to hit a home run, versus just trying not to strike out.”

- Unknown

Every morning at 8:30 a.m. I would receive the same terrifying phone call. “Hey, it’s Kevin. Tell me what is going on over there!” It wasn’t a question, it was a beratement. A setup for me, a young naïve manager, to nerve-rackingly fumble my words in intimidation, trying to explain to a seasoned health care executive with extreme power something he already knew the answer to. It was a combination of a scene from the Twilight Zone and Groundhog’s Day. The same stressful and belittling situation experienced over and over again.

Just a few months prior, I began working as a social worker in a hospital for kids with mental health conditions. We had no local brand recognition, little resources for outreach, and were facing political barriers that prevented referrals. While we were making progress, we were only about halfway to our budget goals. I had started this job working directly with kids, and as we slowly grew I was promoted to program supervisor. I had some supervisory experience, and had some strong leadership traits. However, I was new to health care and was at times overwhelmed with the entrepreneurial spirit that was abundant in this organization. Nevertheless, each day my boss would call me at 8:30 a.m., shouting the same thing in the same harsh tone, “Hey, it’s Kevin. Tell me what is going on over there!”

In the few short months I had been in this role, I developed an intense loyalty to the kids and families that we work with, and also with my colleagues. I was surrounded by wonderful people who shared a passion for helping others who were facing challenging situations. We energized each other. I was now in a position that had obvious career trajectory, but my boss was simply mean. While I envisioned myself in a supervisory position someday, this is not at all what I thought it would be like! Each day after this phone call, I would go through the same seemingly neurotic motions – I would check the referral notes, verify new assessments, check with our social workers on the admissions calendar, and at times I would even hastily make phone calls to colleagues in the community to see if they had any referrals. The reality is that none of these actions were going to change the fact that we were not meeting our goals. We were going to be running in the red for months and nothing was going to change that overnight. I would exhaust myself throughout the day – I wanted to help our kids, support our staff, and not disappoint Kevin. Actually, I just wanted to appease Kevin. It never mattered, the very next day I knew I would get that same phone call at 8:30 a.m.

At first, my explanations only seemed to make him angry. I then tried to be more specific – but he heard these as excuses, and only got angrier. Over time, I began to realize that he didn't really care about the reasons, he just wanted us to meet our goals and his call to me was his way of being accountable. So, I learned to avoid making excuses and shifted my responses to merely validate his concerns, often

at the expense of my own ego. Again, none of this immediately changed our overall performance shortfalls, but it did demonstrate to him that I was listening. Still, every morning at 8:30 a.m. my phone would ring...

Over the next few months our program slowly became more popular. We hired more staff and eventually even opened a second program on the other side of the metro area. I got to know Kevin better and found that he was brilliant in many ways and at times incredibly charming. However, his leadership style remained the same. He was an autocrat whose blunt tool used to motivate people was intimidation. He lacked the ability to inspire or empower, and make people feel cared for. He had no apparent passion other than to succeed with his own goals.

As things would improve in one area, Kevin would focus his disappointment in another. It started with the shortfalls in program volumes, then it was problems with policy enforcement, then it was a fumbled software implementation (that he was ironically responsible for overseeing). I found that I hadn't taken time off in months, I had stopped exercising, and was always on edge. My loyalty to our mission and my colleagues stayed strong, but my energy was fading. In a somewhat selfless way, I often felt as I though it was my job to deal with Kevin so that the rest of our staff didn't have to. It was my cross to bear.

A few more months had passed and I was promoted again to a director position. Our programs continued to grow, our referral base became stronger and we had developed some powerful strategic relationships in the community.

Early one evening on a random spring day I received a voicemail from John, a colleague and dear friend. I knew there was a late afternoon meeting with a few other managers, and John was in that meeting along with Kevin. When I realized I had missed a call from John, my mind immediately began catastrophizing! Is it possible that John was in trouble? Was I in trouble? Is the company in trouble? My mind jumped to a single conclusion – somebody was in trouble. I took my cell phone and dashed to a quiet room, closed the door and sat down to listen to the message:

“Hi Todd, it’s John. I just wanted to let you know that I was in a meeting with Kevin. He made a point to share with the group how impressed he has been with your work ethic and performance. He said, ‘Todd always gets things done. No matter what the obstacles, he always seems to persevere.’ So, I just thought you’d want to know that. See ya tomorrow.”

I was in shock. I listened to that message over and over again. Not only hearing the kind words that Kevin shared with the team, but also knowing that John knew how beaten down I had been, and thought to share that with me was incredibly meaningful. For nearly a year, I felt undervalued by Kevin. Now, through the grapevine I learn that he actually respects me?! From that moment on, I continued my work as usual, but viewed Kevin through a different lens. I heard his comments differently, and responded with more confidence. I was confused why he

managed people in such a negative way, and began to feel sorry that he did not have more effective leadership tools. Ironically, his style helped me grow as a manager, but at a great cost.

I began to reflect on two questions:

- 1) How did Kevin develop his leadership style?
- 2) How had Kevin's leadership style shaped me over the last year?

Through an unanticipated twist of events, a few months later Kevin had left our organization. I was now reporting directly to the company owners, who were highly compassionate and supportive leaders. It was nearly a year later that I confided in one of the owners the tribulations I had endured under Kevin's leadership. As I suspected, he was not very surprised. I began to share specific examples of his leadership and how it had painfully helped to develop my confidence as a leader. I was partially venting, but also validating the company's direction. After a few minutes of patiently listening, our owner looked at me with a discerning smile and simply said, "I'm sorry that you had to experience that leadership style, and I want you to know that there are better ways to teach. And now, Todd, you can help others learn from somebody who is wiser."

I had received some of the most intensive, experiential training. I endured a vast amount of leadership development through adversity. I had learned resiliency, adaptability, and even data analysis – the hard way. The changes in our leadership structure created hope and instilled confidence. I persevered through a combination of

exhibiting passion and stubbornness. I had learned a lot, but it was painful. I needed to make sure that I wasn't calloused, but rather that I had become stronger and resilient.

There were at least a dozen moments during this timeframe that I should have quit, simply out of principle. I didn't, and I'm both proud and ashamed of that. I like to think that I took the high road, but part of me feels that I was simply not strong enough to stand up to Kevin. These experiences taught me the difference between the power of a leader who encourages you to try to hit home runs, versus a leader who just wants you not to strike out. His style hindered creativity and stifled productivity. It was more about just showing up and not screwing up.

I imagine that Kevin's leadership style began to develop early in the course of his long career. In other positions, he likely found that autocracy and intimidation could deliver short-term results. He probably found that he could intimidate people into reacting in the way he wanted. Unfortunately, he remained unaware or unconcerned about the impact it had on the people around him in the long-term. This style has allowed him to build an impressive resume filled with executive positions, but none that seem to last more than a couple years.

It's important that we continually reflect upon the development our leadership style and assess if it is the right style for us, our team, and our organization. Leadership styles develop over time, and can be reshaped over time.



Chapter 6: Leadership Styles

“Leadership is created through adversity.”

- Bill George

Each of us display work styles that have been shaped by our experiences and relationships. Our unique style is demonstrated in our personal or recreational time as well as our work time. We adopt styles that we have experienced to be normative and successful. Some of our behaviors at work can be explained through operant conditioning, as described by B.F. Skinner in studies dating back to 1938. We tend to repeat behaviors that are successful, while avoiding behaviors which are unsuccessful or generate negative experiences.

While there are many psychodynamic factors that shape our leadership characteristics, including the modeling by mentors, we should seek to identify which traits we



Leadership Styles

demonstrate a majority of the time, and reflect on the impact they have on those around us. It is important to be conscious of our leadership style, and be mindful of how that will impress upon others. Leading with the head and heart allows us to embrace numerous leadership styles and adapt them to the situation.

Below are some of the common leadership styles that are demonstrated by many of today's leaders:

1. Autocratic leadership

Autocratic leadership is an extreme form of transactional leadership where leaders have absolute power over their workers or team. Members have little opportunity to make suggestions, even if these would be in the team's or the organization's best interest.

Most people tend to resent being treated like this. Therefore, autocratic leadership often leads to high levels of absenteeism and staff turnover. However, for some routine and unskilled jobs, the style can remain effective because the advantages of control may outweigh the disadvantages.

2. Bureaucratic leadership

Bureaucratic leaders work "by the book." They follow rules rigorously, and ensure their staff follows procedures precisely. This is a very appropriate style for work involving serious safety risks (such as working with machinery, with toxic



Leadership Styles

substances, or at dangerous heights) or where large sums of money are involved (such as handling cash).

3. Charismatic leadership

A charismatic leadership style can seem similar to transformational leadership in that these leaders inspire lots of enthusiasm in their teams and are very energetic in driving others forward. However, charismatic leaders can tend to believe more in themselves than in their teams, and this creates a risk that a project, or even an entire organization, might collapse if the leader leaves. In the eyes of the followers, success is directly connected to the presence of the charismatic leader. As such, charismatic leadership carries great responsibility, and it requires a long-term commitment from the leader.

4. Democratic leadership

Although democratic leaders make the final decisions, they invite other members of the team to contribute to the decision-making process. This not only increases job satisfaction by involving team members, but it also helps to develop people's skills. Team members feel in control of their own destiny and, are motivated to work hard by more than just a financial reward.



Leadership Styles

Because participation takes time, this approach can take longer, but often the end result is better. The approach can be most suitable when working as a team is essential, and when quality is more important than speed to market or productivity.

5. Laissez-faire leadership

This French phrase means "leave it be," and it is used to describe leaders who leave their team members to work on their own. It can be effective if the leader monitors what is being achieved and communicates this back to the team regularly. Most often, laissez-faire leadership is effective when individual team members are very experienced and skilled self-starters. Unfortunately, this type of leadership can also occur when managers do not apply sufficient control.

6. Task-Oriented leadership

Highly task-oriented leaders focus only on getting the job done, and they can be quite autocratic. They actively define the work and the roles required, put structures in place, plan, organize, and monitor. However, because task-oriented leaders do not tend to think much about the well-being of their teams, this approach can suffer many of the flaws of autocratic leadership, with difficulties in motivating and retaining staff.



Leadership Styles

7. People-oriented leadership

This is the opposite of task-oriented leadership. With people-oriented leadership, leaders are totally focused on organizing, supporting, and developing the people in their teams. It is a participative style, and it tends to encourage good teamwork and creative collaboration. In practice, most leaders use some combination of task-oriented and people-oriented styles of leadership.

8. Servant leadership

This term, created by Robert Greenleaf in the 1970s, describes a leader who is often not formally recognized as such. When someone, at any level within an organization, leads simply by meeting the needs of the team, he or she is described as a "servant leader." In many ways, servant leadership is a form of democratic leadership, because the whole team tends to be involved in decision-making.

Supporters of the servant leadership model suggest that it is an important way to move ahead in a world where values are increasingly important, and where servant leaders achieve power on the basis of their values and ideals. Conversely, others believe that in competitive leadership situations, people who practice servant leadership can find themselves left behind by leaders using other leadership styles.



Leadership Styles

9. Transactional leadership

This style of leadership starts with the idea that team members agree to obey their leader totally when they accept a job. The "transaction" is usually the organization paying the team members in return for their effort and compliance. The leader has a right to "punish" team members if their work does not meet a pre-determined standard.

Team members can do little to improve their job satisfaction under transactional leadership. The leader could give team members some control of their income/reward by using incentives that encourage even higher standards or greater productivity. Alternatively, a transactional leader could practice "management by exception" – rather than rewarding better work, the leader could take corrective action if the required standards are not met.

10. Transformational leadership

People with this leadership style are true leaders who inspire their teams constantly with a shared vision of the future. They are ideal role models, and are embody trustworthiness. While this leader's enthusiasm is often passed onto the team, he or she may need to be supported by "detail people." Effective transformational leaders are exceptionally motivating, and are highly trusted.



Leadership Styles

When your team trusts you, and is really "fired up" by the way you lead, you can achieve great things!

Most of us naturally exhibit traits of several different leadership styles at certain times. We should learn how to leverage various leadership styles depending on the situation. We can store in our toolboxes the aspects of each style that suits our personality and the circumstances. While few styles are natural for us and effective all of the time, a combination of many styles may suit our nature and help meet our goals best.

The following quote was first attributed to Napoleon Bonaparte, and has since been adapted by countless military leaders, "There is no such thing as a bad soldier, just bad officers." This mentality can invoke strong reactions, but it is generally agreed upon that the onus is on us, as leaders, to find the best way to motivate and inspire those around us.



Chapter 7: Valuing Time

“Learn to enjoy every minute of your life. Be happy now. Don't wait for something outside of yourself to make you happy in the future. Think how really precious is the time you have to spend, whether it's at work or with your family. Every minute should be enjoyed and savored.”

- Earl Nightingale

Time is the most valuable type of currency in existence. It has universal value wherever we go, and can be used and spent in similar fashions wherever we are. For centuries, time has been a coveted treasure, and it is often the one thing we wish we had more of.

Dissimilar to money, time cannot be saved, invested, or traded – in fact, it is constantly being spent whether we choose to spend it or not. However, similar to money, time can be wasted and even lost. Jim Rohn said, “Time is more



Valuing Time

value than money. You can get more money, but you cannot get more time.” This means we need to be conscious of how we are spending time, as well as being respectful of our time and that of others. This is also a demonstration of a healthy EQ.

Time should be spent wisely, and though that can be a subjective determination, which depends on the person, their values, and their current situation. Spending time having coffee with a friend or trading stocks on Wall Street may have the same value to two different people. How we spend our time does not mean choose one thing over another, we can spend our time in many ways as long as we can organize it. You cannot buy more time for yourself, and you cannot get it back once it is spent. All of these are reasons time is so valuable.

Keen management of time and currency goes back to our value of discipline. Previously in this text we covered the importance of discipline both as a virtue, and as a way to stay on task. Both attributions apply to how we can be disciplined with managing our time. Many people may come to you in haste with a seemingly urgent need. It is worth it to deliberately assess both the actual importance and urgency of this need. In many cases, this need may actually be neither important nor urgent. The Important vs Urgent quadrant (in Section 4) distinguishes how tasks that are truly urgent and important may need to be addressed now, while if it is neither it can wait until later. Tasks that are urgent but not important can be delegated. Lastly, tasks that are important but not urgent should be carefully



Valuing Time

planned instead. This quadrant is a useful tool in helping us manage our time.

Here are some quick tips on how to best manage time as currency:

- 1) Spend your time on things that are important.**
Time needs to be spent wisely, and you have finite amount of time. If something is important to you or somebody else, then it is likely worth your time. If it is not important to us or another, we need to find ways to stop investing our time.
- 2) Schedule time using five-minute increments.**
Most people schedule time in 30 or 60 minute chunks. While this may be convenient, you can be more productive if you break down your time into smaller chunks. You can accomplish a lot in just 5 or 10 minutes of dedicated time (i.e. making a phone call or responding to an email). You can also waste a lot of time if you schedule 60 minutes on a topic that only warrants 40 minutes of your attention.
- 3) Start on time, no matter what.** If five people are waiting 10 minutes for you to arrive to a meeting that you are leading, you have collectively wasted 60 minutes of productive time. There may be instances in which people question the need for such rigidity, but there are few excuses as to why not.



Valuing Time

4) Finalize decisions and delegate actions items.

Schedule follow-up meetings as needed and share meeting notes/minutes with the group. Do not allow meetings to turn into more meetings.

The way in which we manage the collective time of a group in a meeting is way to showcase how we can effectively lead with the head and heart. Below are some ways to run a successful meeting and make the most value of everyone's time:

- 1) Define the scope.** Identify the goals and objectives for the meeting. Determine who needs to be included and when the meeting needs to take place. Attendees should be clear in advance of the purpose of the meeting.
- 2) Build an agenda.** Once you have established your goals and objectives, build an agenda as a roadmap to help accomplish those goals. An agenda is critical in managing an organized and timely meeting.
- 3) Send invitations and information.** Carefully determine which people need to be invited. Share the agenda and pertinent information with participants in advance of the meeting.
- 4) Prepare the materials and space.** Collate necessary materials in advance and make sure the space is setup to help facilitate the meeting (chairs, technology, coffee, etc).



Valuing Time

- 5) **Facilitate the meeting.** You are the leader and therefore responsible for the meeting. Follow the agenda and keep the meeting moving along. Keep participants engaged and the meeting productive. Pivot as necessary, but with careful intention.

- 6) **Record action items and send minutes.** Summarize the meeting and schedule necessary time for any follow-up. Share action items with each party and, where appropriate, establish deadlines for completion. Meeting minutes should be sent within one week.

It is important to establish practical meeting norms, then role model, and enforce them consistently. We may need to clearly explain the norms to our colleagues to gain essential buy-in. This degree of discipline will create predictability and comfort for the group.

The leader should provide the resources and tools the group will require to stay on task. Resources may include background information, analysis, tables and data. The tools may include developing timelines, task lists, technology and more. For the most part, we all have access to the same resources and tools as our counterparts. The differentiator is how we can learn to best leverage those tools.

Our ability to facilitate efficient meetings and manage time wisely will greatly enhance our chances for success and will consistently set us apart from our competitors.



Chapter 8: Managing Change

“The single biggest problem in communication is the illusion that it has taken place.”

- George Bernard Shaw

It was the Greek philosopher Heraclitus who was known for his doctrine that change is central to the universe. Among his many writings, he stated that nothing remains the same and that everything changes. Now, nearly 2,500 years later managers in all aspects of business continue to philosophize about the best ways to understand and manage change. We could say that one thing has in fact remained unchanged, and that is our constant struggle to understand and manage change.

Managing change has traditionally been characterized by using psychological and behavioral tactics to manipulate processes or systems, such as using the “carrot and stick”



Managing Change

method of motivation. However, change is more successfully managed through more thoughtful multi-dimensional assessments using tactics deployed through understanding and engineering technical measures. An example may be using a root cause analysis to determine how or where an error in a process originated, and how it then affected related systems.

Understanding Change

Change can come in almost any form, ranging from barely noticeable to transformative. Some common changes within the workplace involve reorganization within departments, revised processes, integration between systems, approval of research protocols, adoption of new technology, and improvements to a facility. Changes can occur through an elective process, such as a business choosing to expand its footprint or services. Or, change can come about because of a mandate such as new tax laws. Understanding the reason for change and the process is an important first step to successfully managing it and determining an implementation plan. While complicated descriptions of the change implementation process exist, a simplified version of the implementation process can be described in five simple steps: assessment, preparation, plan, implementation and evaluation. However, the way in which leaders follow these steps through implementation is critical.

Promoting change can be both demanding and fatiguing. *People do not resist change in general, they resist change*



Managing Change

they either do not understand or do not feel is beneficial. What may seem like a minor or insignificant change to one person, may cause major changes for another. Employees want to understand the reason for change and how it will affect them. If you are able to effectively communicate what change means, your chances of successfully managing change increases significantly. There is an adage that says, “Sell, don’t tell,” which challenges leaders to help employees understand the reasons for change and why it is necessary.

A metaphor that aptly describes the dynamics and importance of change is the difference between rivers (change) and puddles (stagnation). According to Ann Rogerson, a professor in the School of Business Management with the University of Wollongong in New Zealand, a flowing river represents continuous yet incremental development and refinement of a moving force. Rivers are constantly renewed with fresh water, are influenced by internal and external forces, and can adapt as necessary to the environment, always moving toward an end point. Rivers can be redirected, harnessed, channeled, and reused. In contrast, a puddle contains stagnant water that is never renewed and has no ultimate destination without external help. Puddles are limited by boundaries, cannot effectively adapt, and will eventually evaporate. Rivers can be mapped and understood whereas puddles are directionless and largely without purpose. Using the metaphor of rivers and puddles to characterize the depth and dynamics of change, can help illustrate the complexity of change to those who are directly involved in



Managing Change

implementation, or those who are affected on the periphery.

However an organization chooses to define and understand change, there are a handful of common and effective strategies that leaders can practice to optimize their success with change management. Change does not happen in isolation, but rather it impacts the entire organization and systems around it. The following strategies should be applied throughout the change process, and can greatly improve one's ability to successfully manage change.

Establishing a Clear Plan

When faced with the necessity for change, be sure to set a clear vision and strategy for moving forward and be certain how you want to implement the change. It is very important to communicate the change clearly so our employees understand why it is necessary and how it will affect them. During implementation, we should set up milestones, encourage regular progress reports, and reward achievements. To help keep the plan on track, consider using project management tools such as spreadsheets, shared drives (on a server or cloud-based), and flowcharts. The selection of project management tools should depend on the team members and leadership preferences and work style. It is just as critical for a leader to be able to convey a vision to others, as it is to articulate it to themselves.



Managing Change

Understanding the People and the Culture

Just as every river flows differently and every organization and workforce is different. While we need to avoid the fallacy of “terminal uniqueness,” differences exist and it is important to accommodate those nuances. Autocratic or authoritarian leadership styles are generally ineffective and subject to failure, but this is especially true during times of change. While it may seem easy to bark orders and demand outcomes, that is the fool’s way of motivating stakeholders during times of stress and change.

A good leader must not only understand the people and the organization’s culture, but actually show they understand through their actions. This builds trustworthiness. Establishing structure and a consistent style of communication that is in tune with corporate culture will ensure progress. A leader should display confidence in their plan and decision-making, but also show humility and a willingness to accept input. Creating opportunities for employee feedback makes them feel valued and part of the process, creating champions for change.

Concise and Timely Communication

As stated at the beginning of this chapter, George Bernard Shaw said, “The single biggest problem in communication is the illusion that it has taken place.” Change management requires thoughtful planning, quick thinking, and agile maneuvering. Often, the high stakes, stress, and pure excitement of change can hinder communication and



Managing Change

Individuals may quickly find themselves uninformed. Surveys show that communication is the most important factor in the success of managing change and building trustworthiness. It is up to leaders to find the most effective way to communicate concise and timely information surrounding changes so nobody is inadvertently left out of the loop. Gaps in communication create risks that both jeopardize the overall execution of a plan, but also can damage the relationships of the team members.

We may need to adapt our method of communication to individual people so it is important to understand how they best absorb information. This may also mean using a variety of strategies to communicate with employees. Providing concise and timely information is one of the best ways to create trust and confidence during times of change. Leaders should communicate frequently, and not just when there is news to share. This can be done through routine newsletters, regular meetings, individual check-ins, intranet announcements, and in-services. Some employees may prefer in-person communication, while some may be content with email. Some may understand graphical information best, whereas some may prefer text. Effective communication may be one of the most important aspects of change management, yet it is often taken for granted or ignored entirely. As leaders, we should show progress on tasks and incremental achievements that build confidence surrounding change.



Managing Change

Anticipating Needs

The best leaders are the ones who anticipate needs rather than react to them. While this is often easier said than done, our ability to plan and avoid mistakes will prove incredibly valuable while managing change. A common complaint is that organizations tend to be too reactive, which assumes they are not behaving proactively. Ironically, when an organization or leader is successfully proactive, the results are likely not noticed at all. Poor planning by one person can lead to a crisis for another person. This will result in a loss of trust stock.

During the process of assessing the impact of change, a leader should consider the “butterfly effect” of their actions. Any change, no matter what size, may in fact inadvertently impact an individual, department, or process elsewhere in the organization unbeknownst to the original catalyst. It is important to strategize about these effects and as a result anticipate the needs of those directly affected along with those on the periphery. Not anticipating needs can be disastrous and lead to a lack of confidence among employees. A lack of confidence in leadership can derail the best-laid plans and undermine employee commitment.

Adaptive Management

Leaders who can adapt and thrive in challenging environments by applying a heuristic problem-solving process will be more successful than those who are rigid and unwilling to think creatively. The framework of



Managing Change

adaptive leadership compares the differences between *technical* and *adaptive* challenges. This framework describes a technical challenge as something that can be solved with a single fix or solution—such as changing a tire on a car when you get a flat, or upgrading a computer processor to improve speed.

An adaptive challenge does not have a defined solution, but requires creative problem solving and the application of a tailored approach to influence and inspire the people involved. Even after careful assessment and clear planning, the need for an agile response and adaptive management will be critical for a successful implementation. Chaos theory states that behavior in dynamic systems is highly sensitive to initial conditions, and outcomes are almost impossible to replicate. Whether the change warranted is elective or mandated, each situation is unique and subtle nuances will exist. Whether change involves technology, finances, or individuals, a good leader will deploy adaptive management techniques to closely monitor and respond to the change process to insure optimal outcomes.

Section 3: Wisdom

“If people never did silly things, nothing intelligent would ever get done.”

– Ludwig Wittgenstein

To recognize the possession of wisdom is humbling, and to share it with others is truly divine. Wisdom is gained by combining knowledge, values, and experience. Albert Einstein highlighted his three rules of work:

1. Out of clutter find simplicity;
2. From discord find harmony;
3. In the middle of difficulty lies opportunity.

Summer Break

“A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves.”

- Lao Tzu

I knew my summer break of 2003 was going to be the best one yet. Unlike all previous summers that I spent looking for temporary work, mowing lawns, and anxiously anticipating the start of the next school year – I was now a grown adult, and gainfully employed as a school counselor. I was no longer a student, I was a part of the school staff. I had the benefit of a steady paycheck, and three months ahead of me to enjoy summer with family and friends!

The previous school year went incredibly well. I was working in my first role as an elementary school counselor focused on supporting students, families, and even staff when needed. I spent the workday doing what I love, and spent the afternoons at the middle school pool coaching springboard diving. It was an amazing community full of vibrance and opportunity. I quickly made many friends who were colleagues throughout the school district, was invited to join the staff softball team, and even met the amazing woman who would eventually become my wife. I was truly flying high and enjoying every moment.

Joe was the principal of the elementary school where I worked. He was a powerful force, and for all the right reasons. He was incredibly engaging as a leader, charismatic, warm-spirited, and in touch with the needs of

the school. He was truly a caring person who could quickly build rapport and earn inherent respect. While he maintained a high degree of professionalism, he also had a gift for affably displaying his personal side. These traits made Joe a very authentic leader. As a new counselor who was both hungry and naïve, he was the perfect boss to help guide and shape the start of my career. Joe's feedback was candid and helpful. His words were always constructive and never hurtful. He had an ability to connect with people and tell them what they needed to hear. Not only did he teach me a lot about working in the school, he also helped me understand how to conduct myself as a professional. He wasn't a sucker for gossip nor did he choose sides in arguments. He modeled fairness and objectivity that is critical for a healthy workplace. I quickly found my growing career under the broad wings of his leadership was incredibly fulfilling.

Joe encouraged me to leverage my coaching instincts, and bring up new ideas for the school. One of those ideas came from a past experience when I helped launch a bullying prevention program at the elementary school where I did my internship. With Joe's support, I was able to replicate this program in our school. It was a great program that taught kids practical skills to respond to bullying behaviors. A key part of this program was conducting a student survey to help identify specific times and places that kids observe bullying. In contrast to the survey results gathered during my internship, I noticed a significant spike in reports of bullying on the school bus. Because the school where Joe and I worked was rural, kids spent much more time on the school bus, creating more time and opportunities for kids

to simply behave poorly. I had previously heard about another school that had school bus monitors for this same reason. When I shared this idea with Joe, he simply replied by saying, “Go for it kid!”

At the end of the school year all of the teachers packed up their classrooms so the building could be cleaned and re-staged for the next school year. Every room was emptied except for two offices: Joe’s and mine. Joe had set aside a modest budget to pay me a couple days per week throughout the summer to help build this program. I’ll never forget arriving to the school the first Monday of summer and seeing that the only two lights on in the building were ours. I spent the first 30-minutes or so tidying my office and putting away the games and craft supplies that were popular with the kids during the school year. As soon as I sat down in my chair to get to work, Joe walked in with a huge smile on his face and sat down on top of the table in my office. He looked at me with both excitement and anticipation. His enthusiasm for new ideas was contagious. I immediately smiled back at him and slowly began to realize, he was waiting for me... after a few moments he said, “Well, what do you think?” I was still just smiling. “Umm”, I thought to myself. It dawned on me that this was the moment that the real work began, AND the real work was up to me. There was no existing project plan, instruction manual, or recipe card. We were faced with a unique challenge, and it was up to our heuristic thinking and creativity to find a solution. More dauntingly, this was falling on my shoulders – I was the one who convinced Joe to endorse this project.

It was in this moment that I first felt the unique swell of energy and passion fill my head and heart. I was not intimidated or frightened, nor was I waiting for anybody else to do this for me. I knew that this was a huge opportunity for our school, that I had the full support of our leader, and that somewhere within my head and heart was the solution to our school bus bullying problem. I could tap into everything I had learned in training, all of my experiences, and my sense of empowerment to think creatively and make a difference.

I hopped out of my chair and went straight to the whiteboard, in a moment that felt like it had been scripted for a movie. Seemingly, without control or any hesitation I began to quickly identify the people who would be involved, the resources needed, and the timeline. I wrote out lists and drew diagrams. Joe chimed in with other helpful ideas and together we identified the key objectives and the costs that would be associated. I was experiencing a rush of creativity and adrenaline that made me feel limitless in my abilities. The ideas kept coming – *and not all of them were good ideas, but regardless we kept sharing what was on our minds.* After about an hour of brainstorming and taking notes with Joe, I had the direction I needed to continue on my own. More importantly, I had his permission to continue on my own.

In his book *Drive*, author Dan Pink talks about the power of having both mastery and autonomy over ones work. I now realize that Joe's leadership had allowed me to have both mastery and autonomy over my work, and I felt safe sharing my ideas with him. I felt powerful and valued, a

true master of my trade. I also felt comfortable and inspired to make my own decisions. Over the next few weeks we developed a program that would allow kids to feel safer on the school bus and resulted in fewer incidents involving behavior problems. While I'm extremely proud of my ability to identify the problem and implement a solution – it is clear to me that without Joe's transformational leadership style, I never would have been able to develop this program on my own. While my name may have been associated with the program, Joe was the true artist behind the scenes that made this happen.



Chapter 9: Strengths & Gusto!

“Luck is when opportunity meets preparation.”

– Roman philosopher Seneca

It is hard to describe the feeling you get deep inside when you succeed at something you genuinely care about. It feels fine to finish a task, it feels good to complete a lengthy project, and it feels great to win. When our work is filled with opportunities to do what we do best, it fuels our passion to want to do more. In contrast, it is draining to spend time doing things that we do not care about, or participating in activities which we cannot win.

When it comes to strengths, we are not all created equal – and this is a wonderful thing. Each of us has opportunities to add value to this world in remarkable ways. The trick is to identify how, and then put ourselves in positions in which we can all leverage those opportunities. This is good



Strengths & Gusto!

for us, good for the team, and good for the organization. Some contribute by making things, some contribute through scientific thinking. Many people may have the ability to build things, while others have the ability to design things. Each of these talents alone is valuable, but when combined with others they can be transformational. When we can discover and share with others what we do well, we can change our lives.

Marcus Buckingham is an author and researcher who has devoted much of his work on exploring talents and unlocking ones strengths. He defines strengths as not only as the areas in which we excel – but in the areas in which we excel and that make us feel stronger. This means that simply being good at something does not mean it is necessarily a strength. It has to be something that inspires you and provides intangible reward and fulfilment. It is important we identify our strengths wisely, and that we be specific about what they are. Through Buckingham’s work in Strengths Essentials, he emphasizes the necessity for drilling into our strengths and identifying how our unique abilities can help meet individual, group, and organizational goals. This does not require a moment of clairvoyance or taking a comprehensive assessment. This means that we need to exercise self-awareness and take time to truly pay attention to our work and what drives us. Through applying these same principles to teamwork, high productivity teams are well rounded, precisely because the individuals are not.



Strengths & Gusto!

When we leverage our true strengths, we are able to contribute the most to both the people around us, and also fulfill our own intrinsic needs. If our strengths only bring value to those around us and not ourselves, then we will eventually experience compassion fatigue and these particular skills likely will not remain a strength. In contrast, if our strength is only self-fulfilling and does not contribute value to others, then that is what we simply call a hobby.

It is the responsibility of leaders to help others identify and capitalize on their respective strengths. Think of it this way, *average leaders play checkers, while great leaders play chess*. Great leaders recognize that the best teams are comprised of individuals with unique talents and strengths. Together these teams can do things differently, strategize, and collaborate to accomplish amazing things. Average leaders see team members as entirely equal, and differentiates them simply by title, rather than by individual talent and gifts. While we know that individuals can do so much more when we leverage strengths, engagement surveys have consistently shown that a majority of people do not feel they are able to use their strengths most of the time at work. This is stifling for personal development, and is subsequently bad for any business.

It is important to understand that we have an opportunity to grow the most in our areas of strength. These are areas in which we naturally excel, and are more apt to focus attention and interest. By paying attention to the areas in which we are naturally drawn, we can better recognize



Strengths & Gusto!

strengths that may otherwise go unnoticed. It is our nature to more easily recognize areas of weakness. This can result in being too hard on ourselves, or those around us. We tend to overemphasize efforts and the need to improve in these areas. This attitude is draining, and will not yield the results that we imagine. This does not mean that we should ignore weaknesses, as improving in these areas may be necessary – but we need to wisely understand the rate-of-return that we will get from focusing on strengths as opposed to weaknesses.

The Power of Engagement

Understanding our true strengths will set us apart from our peers and allow us to flourish! We will find that accomplishments will come naturally to us and that our engagement in work and relationships will increase. Engagement is the intangible link between presence and results. Many of us can simply be present and accomplish mundane tasks without ownership or even accountability. It is when we are truly engaged that deliver results – often beyond what is expected.

Since the 1940s, the Gallup Organization has been conducting research and studies regarding employee engagement, strengths, wellbeing, diversity & inclusion and more. As a consultation agency, they have data showing remarkable improvements in productivity in organizations they have helped. As a publisher and analytics firm, they have shown the world at clear business case for leveraging strengths. Their studies show that



Strengths & Gusto!

teams that are strengths-focused are substantially more productive. This leads to better business outcomes, more satisfied clients, and ultimately lower employee turnover. Employees are far more likely to stay in a role in which they are engaged and are able to leverage their strengths, as opposed to a role that may simply pay more or have more power. They will also perform *far better* work.

While there have been dozens of notable studies about employee engagement, they all have the same generalized outcomes when it comes to the top factors of job satisfaction. Leading with the head and heart means understanding the most important factors that consistently appear in employee engagement surveys:

- 1) Idealized influence.** Knowing that the leaders of an organization live their values with one another. They behave in the same way they expect others to behave.
- 2) Intellectual stimulation.** We crave challenges that can leverage our strengths and push our limits. These types of challenges should be practical and allow opportunities for growth and success.
- 3) Nourishing culture.** The culture should reflect our values and show that we are cared about and valued as individuals. We need to feel safe and supported in our environment.

These high-ranking job satisfaction factors are the ones employers should focus on deepening, to further engage



Strengths & Gusto!

and motivate teams. Interestingly, salary and benefits are usually lower on the job satisfaction list, often times not even included on the top ten. These lower ranked factors are seen as fundamental to one's employment, but the strength of these factors (i.e. how much you are paid) has far less influence on our engagement and satisfaction. The wisest leaders understand that merely paying somebody more likely will not increase his or her true job satisfaction, certainly not in the long-term. Foolish leaders see increasing salary as tactic to fix problems with a relationship or organizational culture, when in reality they just make the problem more expensive and have not actually solved anything.

Gusto!

The definition of gusto is: *enjoyment or vigor in doing something*. We can all think of things that we do with gusto – it can range from things such as sports, games, debate, trivia, music or art.

It would be great if we could approach more things in our life with gusto! When we can engage with gusto, there is a noticeable difference in the results and longevity. When we know we can generate a powerful performance on our own, we are likely to succeed. Dan Pink emphasizes *mastery* and *autonomy* as the key ingredients to motivation and success. When we experience intrinsic reward when performing tasks, we are more likely to enjoy and even repeat those successes. We will likely need very little guidance or external motivation to engage with tasks



Strengths & Gusto!

that provide this type of experience. In fact, we are often the only ones who can truly identify what gives us gusto and intrinsic reward.

Leaders that have experienced the intangible power of leveraging strengths with gusto are likely leading with the head and heart. This means that we need to identify our own true strengths, while at the same time helping those around us identify *their* true strengths. We should strive to find smart people who have strengths that can complement our strengths, and those of the team. Leaders who have this ability are true heroes, and will accomplish extraordinary things in their careers and personal lives.

When we possess the humility and wisdom to enable others to succeed, we have truly graduated to a new level of personal confidence and even selflessness. It is a unique skill to recruit and retain smart people to coalesce as a team. We should not hire smart people and simply tell them what to do. We should generously solicit their opinions and empower them to help guide and shape the pathway to success. Otherwise, there is no point in spending the time or money to hire smart people. When we surround ourselves with good people, good things will happen.

There are vast amounts of research and evidence that support the strengths perspective and the power of leveraging gusto is. The application of both can be the most critical part of our personal and professional success. However, our pursuit of identifying strengths and applying



Strengths & Gusto!

them to our work may be one of the most difficult. The exploration of tools like the StrengthFinder™ self-assessment, the Johari Window, and even professional coaching may be necessary.



Chapter 10: Building Trusting Relationships

“Trust is the glue of life. It’s the most essential ingredient in effective communication. It’s the foundational principle that holds all relationships.”

- Stephen Covey

The value of strong, trusting relationships should not be underestimated. In author Stephen Covey Jr’s bestselling book titled the Speed of Trust, he emphasizes that *nothing is faster than the speed of trust*. The combination of a positive moral character and strong competencies create the groundwork for trust to be built. We have neurochemical responses to trusting relationships that releases oxytocin, serotonin, dopamine, and other strong hormones into our bloodstreams. These responses can allow us to function in a more comfortable and even



Building Trusting Relationships

enhanced cognitive and emotional state. We can actually become smarter and more efficient when we are around people that we trust. This is an inherent understanding for those with a healthy EQ.

Trustworthiness is the virtuous attribute that we develop through relationship building, and trust is the result. One of the best ways to earn someone's trust is to give them yours. This inherently means becoming vulnerable as well, which shows others that you are invested in the relationship.

In order to build truly meaningful relationships, it is important to understand how others express and accept appreciation. While some people may prefer material gifts as a sign of appreciation, others may prefer kind words or public recognition. When we understand the language of appreciation, we can more easily motivate teams and develop trust.

Demonstrate trustworthiness by being respectful, open, and understanding. We can expend a lot of time and energy speculating about another individual's or organization's motives. We do this through trying to determine their next move or decision, or by trying to analyze why they may have done something – usually based on limited information. Before we know it, we exhaust our energy, and our passion dwindles. While conspiracy theories can be intriguing, we should try to remember Hanlon's philosophical razor: *Never attribute to malice that which is adequately explained by stupidity.* All



Building Trusting Relationships

too often we tend to apply villainy or intent of harm to the actions of others that disappoint us. This razor reminds us that we are all human and prone to errors (or more harshly, stupidity). Try not to criticize someone's moral character if they fail to deliver results. Instead, believe that most people can be trusted and they strive to do well. Our kindness may be reciprocated in the future when we experience stumbles of our own. Our ability to forgive is a strong demonstration of high EQ.

The way in which we conduct ourselves with others will greatly influence our trustworthiness. We should avoid being coy or cynical – as both are behaviors that can unconsciously cause others to be uncomfortable. When we jump to conclusions or speak abrasively behind closed doors, people may wonder how we conduct ourselves with others when they are not present. We should behave in a sincere way so that others will enjoy being around us. Some basic tricks are to simply be pleasant and positive. We should ask others questions about themselves and be interested in their opinions. Stephen Hawking once quipped that “People won't have time for you if you are always angry or complaining.”

The Neuroscience of Trust

Humans were biologically designed for self-preservation and survival among a group. One of the ways we are designed to survive is through the neurochemical “fight or flight” response. This is activated by our limbic system, in the primitive part of our brain, when faced with a threat.



Building Trusting Relationships

During this response, adrenaline is quickly released and diverts blood flow from our brain to the major muscle groups to allow us to temporarily run faster, jump higher, and fight back if necessary. This is the same biological response we have today. When dealing with a stressful and emotional negotiation, your limbic system may be firing and actually inhibiting your ability for sharp executive functioning.

We can benefit from understanding our bodies neurochemical responses to threats and stress. Similarly, we need to be aware that our words and actions can trigger these same responses in others. When we demonstrate collegiality and trustworthiness, we decrease the risk of triggering stress responses. During conversation between two individuals, if one of them begins to communicate in a threatening manner (through verbal tone or body language), it will likely trigger a stress response that may alter how the other person is processing the situation. In extreme cases, the steroid hormone cortisol may be released in the brain, inhibiting executive functioning. This is a similar response as to when you notice a police siren or fire alarm. Your thinking may become clouded and you may panic. Neuroscience has shown that cortisol can remain in our brains for more than 24-hours after a significant stress response. This creates a “cortisol bath” that could actually inhibit clear executive thinking throughout that timeframe.

The best leaders are aware of these pitfalls and can learn to manage a conversation appropriately to avoid distorted judgement. Most people need time to process events and



Building Trusting Relationships

conversations, especially when they involve intense emotions or high stakes. It may take hours or days for us to fully articulate a response to a situation that may have triggered neurochemical activity.

A common pitfall of a negative neurochemical response to distrust is stubbornness or irrational disagreement. We may make decisions that are contrary to our mission or rational thought, because we have reacted so negatively to another's affect or behavior. Ideally, we can strengthen our self-awareness so we can identify when we are not thinking rationally due to a stress response. We should be wise enough not to react impulsively to these situations, but to instead take the necessary time to process. Consider the power of Dr. Jeremy Statton's words below regarding the profound impact of a lack of trust:

“We have all had a boss that we did not respect. No matter how intelligent or charismatic, you knew that placing blind faith in him or her would be a mistake. You were always watching your back waiting for the sucker punch to come.

A lack of trust allows fear to become a primary motivation among team members. They will fear your opinions. They will fear your decisions and evaluations. They will fear failure. They will fear you.

Once fear creeps in, team members will become paralyzed.”



Building Trusting Relationships

Building trusting relationships may prove to be the most valuable and satisfying uses of our time. When we can rely on our values to guide our actions, we will undoubtedly discover both fulfilling and results-oriented work. These authentic relationships are a critical component to successfully leading with the head and heart.

Below is a quick overview of the quantifiable neurochemical responses that occur within our bodies when experiencing distrust versus trust:

Responses to Distrust:

- Higher levels of cortisol, which closes down the prefrontal cortex, where new ideas, creative thinking, empathy, and good judgment reside.
- Changes in the dorsal anterior cingulate cortex, which is a part of the brain that is sensitive to conflict. This center responds by sending signals to the amygdala to take over and protect, which triggers primitive thinking and lower cognitive performance.
- Higher levels of testosterone, which makes us more aggressive, and induce us to fight to protect ourselves and our territory.
- Higher levels of norepinephrine, which cause us to want to think more negative thoughts and think we need to be right and fight.



Building Trusting Relationships

Responses to Trust:

- Higher levels of dopamine, the “happy hormone” which creates positive outlook and assigns feelings to our interactions, we have more positive memories and look forward to the future.
- Higher levels of oxytocin, the bonding hormone which makes us feel closer to others and want to be with them and be open with them. This allows us to build positive and healthy relationships.
- These two hormones continue to build, creating wellbeing, creativity, excitement, feeling good and part of something.

When we develop a true appreciation for the power of trust, we can allow ourselves to become vulnerable. We can then more easily discover our personal values in an even deeper sense. As mentioned previously, humility is a virtue of strong and confident leadership. Humility is often underappreciated by leaders, which is a sign of low emotional intelligence. These leaders may come across as arrogant and have a lack of trustworthiness.

Many leaders may feel pressure in certain stressful moments and unconsciously capitulate to stereotypical “boss-like” behaviors that undermine ones trustworthiness. When these responses occur within the more primitive parts of the brain, we can make mistakes that may have a lasting impact on trustworthiness.



Building Trusting Relationships

There are many mistakes and pitfalls that leaders can fall victim to that result in a decrease of trust. These mistakes can happen through being naïve, ignorant, or simply happen because it seemed like an easy choice/decision.

Common mistakes made by leaders under pressure that erode trustworthiness:

Mistake	Correction
Blaming or scapegoating.	Assess objectively and take responsibility.
Not addressing problems soon enough.	Identify risks and start conversations early.
Trying too hard to be “right”.	Listen to others, demonstrate an ability to compromise.
Referring to “me” and “I”, or “my team”.	Refer to “we” and “us” and “our team”.
Overreacting (or reacting too soon).	Act when one has enough clear information to make thoughtful decisions.
Worrying too much about being disliked or unpopular.	Act with integrity. People may dislike decisions, but decision-makers can still be respected.
Frequently using “absolutisms”.	Demonstrate ability to see the “gray area”, reference reliable information while avoiding hyperbole.



Building Trusting Relationships

Just as there are mistakes or pitfalls that can be tempting, many of us have been lead to believe in certain leader myths that can be just as harmful. When we can understand these myths and begin to see them at play, we can bust through them and build greater trustworthiness.

Leadership myths that get in the way of developing trustworthiness:

Myth	Truth
Leaders are born, not made.	Leaders can be taught and shaped. Anybody can learn to lead.
The CEO runs the organization.	CEO's guide and inspire a shared mission. Teams run organizations.
A leader needs to be tough.	Leaders are intelligent and compassionate. Pretending to be tough can undermine emotional intelligence.
Respect is inherent.	Respect is <i>earned</i> by leaders, just as it is <i>earned</i> by those they lead.
Leaders should know everything.	Leaders are learners and problem-solvers. Pressure to have immediate answers leads to mistakes.



Chapter 11: Health and Self-Compassion

“Self-care is never a selfish act—it is simply good stewardship of the only gift I have, the gift I was put on earth to offer to others.”

- Parker Palmer

We have access to more activities and recreational time than ever before. Modern society is flush with golf courses, resorts, parks, restaurants, clubs and more. Even more so, the internet and social media has made getting access to these activities easier than ever – some of them even being available to us virtually! Yet, for some reason we are reporting higher levels of exhaustion and feelings of being overwhelmed than ever before.

In many ways, leading with the head and heart is about our health and wellness. To be a strong leader, we must model



Health and Self-Compassion

the importance of a healthy lifestyle. Optimizing a healthy mind and body is essential to effective leadership. We are not designed to perfectly manage the stressors that come with today's commotion such as deadlines, conflicts, to-do lists, and other pressures to succeed. To amplify this, many of us find ourselves continually feeling rushed and behaving as though we are always in a hurry. We must find ways to adapt to these stressors both mentally and physically. We need to pace ourselves in both mind and body. *The three most fundamental and interrelated areas of health that we must understand, appreciate, and manage are: sleep, nutrition, activity.*

- **Sleep** allows our minds and bodies to recuperate and strengthen. Quality sleep helps to vastly improve our concentration, reaction speed, metabolism, immune function, mood, and more. While we are sleeping our bodies are able to physically restore, and the thought-activity from the day prior converts thinking and ideas to memory and knowledge.
- **Nutrition** is our source of fuel and the building blocks of cellular regeneration. Managing a balanced diet is critical for our physical and mental performance. The quality of the food we eat and how it is prepared, along with the timing of snacks and meal portions are all factors that impact our overall health.
- **Activity** can range from lively social engagements to rigorous exercise. Our bodies and minds need to stay active and stimulated to promote strengths and resiliency. A dormant mind and body will weaken and become susceptible to illness.



Health and Self-Compassion

All too often we ignore the signs of fatigue, distraction, and even illness, and we just carry on. We may even skip meals and snacks to afford ourselves more time in the day. It is during these moments we lose our luster and although we think we are doing the right thing, we are underperforming and unknowingly tarnishing our reputations. We may also begin to neglect healthy activities that promote positivity and smarter thinking. We forget about the value of self-care and we inadvertently become more focused on quantity (i.e. working more hours) than quality. Doing good work is different from simply doing a lot of work. It is much easier to do a lot of work poorly, when our focus should truly be on doing quality work that is a good representation of our competence and skills.

Our Health and Wellness Spectrum

Our overall health exists on a spectrum that ranges from illness to wellness. While few people live on either of the far ends of this spectrum, most of us drift in between, striving to spend most of our days as far on the wellness end as is possible. Overall health includes both mental and physical wellness. We must consider both mental and physical health as core components to overall health – and not surprisingly, the relationship between ones mental health and physical health is quite strong. It is widely accepted that the benefits of physical exercise such as releasing muscle tension, boosting endorphins, increasing energy, and simply becoming more physically fit, all have a positive impact on our mental health.



Health and Self-Compassion

Our health is extraordinarily individualized when it comes to sleep, nutrition, and activity. A plan and lifestyle that works for one person, may not work for another person. We need to create a long-term mindset when it comes to health and allow our habits to embody us, rather than become temporary changes. Each year there are new dieting and exercising fads that may be exciting and generally beneficial, but we have now realized that each person is genetically and biologically wired to respond differently. A good nutritious diet is a critical part of this health and wellness puzzle – *after all, we literally are what we eat*. Unfortunately, there are many amenities in modern society such as fast food, processed foods, sugary drinks, and others that are more focused on profit and convenience than population health. As of today, the best ways to combat these pressures relies on informed consumerism, health education, and social activism.

While physical exercise has a proven positive impact on our overall wellness, it is equally important to exercise our brain. Seek out intellectual challenges by doing puzzles, reading books, trivia, and engaging in stimulating conversations with friends and colleagues. Although we should be aware of the reinforcing influence of our social network, it is important to exercise our cognitive processes on a daily basis.

Mental health experts have long understood the detriments of common comorbid disorders, such as depression and diabetes, or anxiety and asthma. When two or more chronic conditions exist, the costs (time and



Health and Self-Compassion

money) of treating them independently is multiplied by 150%, and outcomes decrease significantly. In contrast, when treated together through integrative care models, the costs and outcomes are drastically improved. We should continually assess our overall wellness on this spectrum and respond accordingly. We should cherish the times that we are well, and seek support or professional help when we are drifting towards illness.

Because we spend most of our time moving within the wellness spectrum, we should not wait until we are ill to seek help. If a swimmer is growing tired in treacherous waters it is far wiser to seek safety before they start drowning, as any delay only increases their peril.

Our health is largely influenced by a variety of factors that may seem out of our control, such as genetics and social determinants of health. There are still many factors that we can control that can further influence our health, such as our daily habits/routine, health education, diet, exercise, and more. We should be aware that our abilities to seek help are significantly diminished during times of illness – both physical and mental illness. Developing a strong support system, building resiliency, and identifying warning signs of illness are all important ways to help combat or prevent chronic and acute health issues. We must be aware that everybody is predisposed to different types of illnesses, none of which we should ever equate with weakness.



Health and Self-Compassion

Self-Compassion

Burnout and compassion-fatigue are two of the more common terms that describe our decreased satisfaction in work, and likely correlated decline in health. Unfortunately, both terms are overly simplified and do not address either how we got here or what we should do next. Regrettably, these terms can be misunderstood as seeking pity or even as an excuse for decreased performance.

Compassion-fatigue is a recognized condition which happens gradually over time – usually many months or even years. Over time, compassion-fatigue will erode our ability to feel and care for others, including ourselves. We may experience emotional blunting and begin to react to situations differently than we might normally expect. The symptoms of compassion-fatigue can be cognitive, emotional, somatic, and even spiritual. It may lead to a lack of authenticity, we may appear hurried to others, and we may begin to treat information as though it is context-free. We lose interest in daily tasks and eventually our performance suffers. If this continues for too long, it will become obvious to others as our cynicism and negativity begin to emerge. This is a true disconnection of the head and heart. We must be aware of the warning signs and demonstrate self-compassion. Consider the following story:

One day you are near a riverbank and a drowning person comes drifting by in the river. You quickly jump to action and dive in the water to rescue them. You return to the shore safely and the



Health and Self-Compassion

person expresses endearing thanks and gratitude. Then, in an instant, you notice another struggling swimmer comes drifting by and you dive back in to rescue that person. You are shocked to realize that one by one, more struggling swimmers come down the river and you and several others are frantically spending all your energy trying to save them. You are quickly tiring and are losing both energy and motivation. You are fatigued and becoming burnt out by these ongoing efforts. Suddenly, you notice somebody else running upstream, and you ask them where they are going. They quickly reply, "I'm going to see why all of these people are falling in the river!"

In this story, we become aware of the difference between someone who simply works continuously and tirelessly, opposed to someone who recognizes the warning signs of burnout, and endeavors to find a solution. The person running upstream is demonstrating wisdom and accountability over the situation. This person is not becoming a victim of their hard work, but instead is thinking ahead so that they can preserve their compassion in a strategic and even creative way.

When we can be fully aware of these symptoms and our functional baseline, we can better combat the detriments that compassion-fatigue has on us and those around us. Empathy is a necessary precursor to true compassion that enables us to experience situations as they are with others.



Health and Self-Compassion

Self-compassion is best described by Tara Brach in her book *Radical Acceptance*:

“Our capacity to relate in a tender and sympathetic way to what we perceive.

Instead of resisting our feelings of fear or grief, we embrace our pain with the kindness of a mother holding her child. We accept our own limitations with grace and self-kindness.

It is asking for help and putting ourselves in the center of our own heart.”

Self-compassion involves taking action on our own behalf, and being willing to be our own ally and friend to provide ongoing support and care. This is a skill that we can learn and nourish through mindfulness and exercises ranging from running and swimming to yoga and meditation. Mindfulness is paying attention to present moment experiences with openness, curiosity, and a willingness to be in the moment -without judgment. We must first take care of ourselves if we are going to be able to help take care of others.

Work-Life Balancing

The phrase “work-life balance” has become quite popular as a way for people to better understand and communicate areas they are focusing too much or too little time and attention. Unfortunately, this phrase can imply an “all or nothing” mentality of balancing our obligations. Or, in other words it can seem that things are either balanced or



Health and Self-Compassion

they are imbalanced. There is also unfortunate meta-message that work is hard and life outside of work is great.

The reality of balancing work and life is that there are countless facets of each that create both distress and eustress. Not everything at work creates distress and not everything outside of work is blissful. The meaning and value that we can derive from our work is often unrecognized, or even disregarded because it was “work”. The reality is that we experience many events at work that lead to eustress such as building relationships, receiving compliments, and making a difference through the work that we do. This means that work in many ways work can be very pleasurable and actually help energize other aspects of our life. We learn a lot about life from our work, and it can also create healthy perspective for us in other parts of our life. Similarly, the experiences we have outside of work can bring both joy and dissatisfaction to our overall balancing act. So rather than limiting this concept to Work vs Life, we need to open our eyes to the multiple-facets of both that overlap, are complementary, and may also be completely separate.

We need to move beyond this notion that we are simply being balanced or not. Most often, aspects of our lives will be imbalanced, and constantly wobbling back and forth near balance. This is ok, and as long as the wobble is not too extreme. It can create greater satisfaction (and growth) than tirelessly trying to find a perfect balance at all times.



Chapter 12: Humble Learning

“Better to remain silent and be thought a fool than to speak and to remove all doubt.”

- Abraham Lincoln

As leaders we must be humble enough to know that there is a lot that we do *not* know. Humility is a virtue and if we ever arrive to a place, where we think we have nothing else to learn, then we have become ignorant and our skills will become obsolete. Through absolutist thinking, many people strive to find the right answer or the perfect response to a situation. Our stubbornness for achieving this degree of justice in our thinking is exhausting, and off-putting to others.

Everybody goes through a phase in adolescence or early adulthood when we think we know everything. Once we understand that we do not, then we can begin to learn



Humble Learning

again, and at a deeper level. Through the humility of constant learning, the goal is that we never arrive to that place of grandiosity again where we think we know everything.

In Plato's Allegory of the Cave, he describes a group of prisoners who are chained inside a cave facing a wall. These prisoners are only able to see shadows on this wall that are cast by people carrying objects behind them who are walking in front of a fire. These shadows are the prisoner's only reality. Eventually, one prisoner escapes and is perplexed and frightened by the fire and the world outside. The other prisoners prefer not to be freed, as they are content with their reality, and do not want to be exposed to the outside world. Plato compares these prisoners to our own ignorance and insecurity of other ideas and forms. The possibility that other ideas may exist is frightening and that some people would rather stick to the reality that they know (i.e. staring at shadows cast in the cave).

To lead with the head and heart means to constantly be open to understanding new ideas.

Challenging our Perceptions

We must be prepared to have our ideas challenged and willing to have our paradigms shifted. Some of history's most famous scientists were doubted and harshly criticized for proclaiming theories that were once considered taboo. A science historian named Naomi Oreskes endearingly referred to Albert Einstein, Charles Darwin, and Copernicus as "Merchants of Doubt" in her 2011 book that reflects on



the history of scientific theories. Each of these scientists developed numerous theories that have revolutionized the ways in which we now understand our world. They did this in spite of criticism and doubt.

In order to truly engage in constructive debate, leaders must have the ability to understand and even argue both sides of an issue. In addition, our ability to manage ambiguity should lead us to the conclusion that there are not simply two sides to any given issue, but likely several. This humbleness and understanding allows us to more objectively make decisions and ultimately learn. People often feel pressure to “pick a side” of an issue, debate, or argument. Rather than picking a side, strive to understand, if not appreciate, the differing points of view.

People tend to become comfortable with their routine, and are blind to possible dysfunction that has formed around them over time. The Boiled Frog metaphor describes how we become comfortable with dysfunction when it is slowly introduced into our routine, even if it makes sense at the time. The fable describes that if a frog is placed in tepid water and the heat is slowly increased, the frog will adapt to the harmful temperature and not notice the danger. In contrast, if a frog is suddenly placed in boiling water, it will realize the danger and immediately jump out. We all should be aware of our tendencies to lose objective perception of functionality as it relates to our comfort level.



Humble Learning

While many of us may identify as lifelong learners, we should assess whether we are doing so in an open and proactive manner, or are we just stimulating our intellect with information that we already know and are comfortable with. Have we found ways to challenge our own thinking by learning new methods previously unfamiliar to us, or by accepting other theories?

Training Zone versus Performance Zone

Dating back nearly 1,800 years ago to the ancient Olympic Games, the Olympic athletes were the first to demonstrate an appreciation for both mental and physical recovery. Athletes today spend far more time training and practicing than they do performing. We can benefit from becoming aware of the time that we spend in our Training Zone versus our Performance Zone. A marathoner will spend 98% of their time *training* for a marathon, rather than actually competing. This type of training incorporates a variety of sprints, distance, intervals, nutrition, strength training, stretching, and more. In contrast, during a workday we may feel we are in the Performance Zone nearly 98% of the time, leaving very little time to practice and prepare. This is the equivalent of that same marathoner running a marathon each day to prepare. There would be very little improvements (if not attrition), and would likely lead to burnout. The risk of exhaustion and injury would be imminent.

Understanding that we do not need to be competing at all times allows us to create realistic expectations for ourselves. This also allows us to take time to learn and



experiment, rather than feeling pressure to constantly be performing. We should allow for diversity in our learning methods involving a variety of types of intellectual stimulation that may include reading, speaking, networking, creating, and more. Just as rest is critical to an athlete's recovery, our bodies and brains require rest to emotionally decompress, flush out build-up of hormones and toxins, and to neurologically regenerate.

Dedicated time spent in the Training Zone allows for both development of new ideas and strategies, as well as for recovery. The level of mental intensity surrounding our work will decrease as we understand the distinction between when we need to perform, and when we simply get to learn and grow.

The Four Stages of Learning

There are four generalized stages of learning any new skill that have been popularized since the 1970s. While their description has been adapted to a variety of technical industries – these stages allow us to create perspective around the timelines and complexities of learning new tasks. More importantly, it helps create a humbling perspective in regarding to learning new skills. Below is a summary of the four stages of learning:

Stage 1: Unconscious Incompetence (Wrong intuition)

We do not know what we do not know. We are simply unaware that there is something that we do not understand. We may deny the usefulness of a particular lesson or skill. We must first be introduced



Humble Learning

to this topic, and then have a desire to learn about it in order to move to the next step.

Stage 2: Conscious Incompetence (Wrong analysis)

We are now aware of a new skill or lesson and have a desire to learn more about it. We do not yet understand how we will learn this skill, or the entirety of its eventual value. It is expected that we will make mistakes during this stage of learning. In this stage we begin to understand the value of humility in learning.

Stage 3: Conscious Competence (Right analysis)

We begin to understand how to do something, or how something works – though our growing awareness is not quite yet fully realized. Demonstrating the skill or knowledge requires concentration. It may be broken down into steps, and there is heavy conscious involvement in executing the new skill.

Stage 4: Unconscious Competence (Right intuition)

We are now able to perform this new skill with consistent successful results. We are aware of how the task is performed well, and how to avoid mistakes. The individual may be able to teach it to others, depending upon how and when it was learned. Having gone through these stages, we develop a greater appreciation for the process of discovery and learning.

In many areas of academics there is a maxim, “See one, do one, teach one.” The original context was originally associated with those learning within any sort of



Humble Learning

apprenticeship model – and it was popularized early on in medical schools. While the “SODOTO” model has been recently criticized in medicine for the sake of patient safety, there are many areas in which this model is a standard of attaining practical skills, experience and knowledge. Some examples are culinary arts, computer programming, engineering and more. When we can develop an expert skill and teach it to another, we have not only embraced a divine art (teaching), but have also reinforced our understanding of the skill itself. We should constantly challenge ourselves to learn more about push our levels of comfort.



Chapter 13: Conscientious Decision Making

“When your values are clear to you, making decisions becomes easier.”

- Roy Disney

Every day we make thousands of decisions. A majority of them are small and do not require much contemplation. Examples of these decisions may be what to eat for breakfast in the morning, which coffee mug to use, and which lane to drive in. Other decisions require some discernment such as what to wear for the day, what time we need to leave to arrive to an appointment on time, and who to invite to a specific meeting. In all of these cases, these individual decisions may guide the structure of our day, but are not likely going to make a significant impression on others. However, in aggregate, it may be



Conscientious Decision Making

these small yet frequent decisions that shape our character and eventually impress our reputation.

In contrast to these small decisions, we are faced with making fewer, yet far bigger and more important decisions that will impact other people, have lasting-effects, and reflect on our character. Many of these decisions require careful thought, ethical discernment, an assessment of our values, and a keen understanding of our own belief systems, filters and potential biases. In order to make conscientious decisions, we must be as informed as possible, which usually means seeking information and perspectives from others as well. This helps create a broader information base, and allows for additional or even competing perspectives.

As mentioned in the beginning of this book, tough decisions should always be tough. While our experiences and wisdom can help guide our decision making in a quicker and more conscientious way, the circumstances that lead to tough decisions will not change. For example, decisions like whether or not to take a new job, or to end a difficult personal relationship. Those are often sensitive and highly emotional circumstances that make deciding between options difficult. By gaining experience and wisdom we can more rationally understand our options. This will bring comfort to the decision making process, and allow us to move forward with integrity.

Conscientious decision making in tough situations does not need to imply that there is a dilemma, but it does suggest



Conscientious Decision Making

the importance of processing through all of the available information and understanding belief systems.

Utilitarianism vs Deontology

There are several popular theories in ethics that can help both understand and guide decision making. Many of these theories can complement and even enhance one another, while some of them contrast one another. Utilitarianism and Deontology are two popular yet competing theories that can open our minds to the complex ethical viewpoints on how we approach decision making.

- **Utilitarianism** is an ethical theory holding that the proper course of action is the one that maximizes the overall "happiness". The moral worth of an action is determined only by its resulting outcome. A common utilitarian idiom was made famous in Niccolo Machiavelli's story *The Prince*, "*Justifying the means to an end.*"
- **Deontology** states that it is the morality of each individual decision that matters, not the aggregate outcome. The focus of our decisions should be on the character of an action itself, not just the outcome. In deontology, the end does not justify the means.

While some purists may abide almost completely by one theory or the other, most of us have demonstrated decision making that at times has been utilitarian, and other times been deontological. While we may not need to choose sides to make proper decisions, it is important to understand their contrast and how either may be more or



Conscientious Decision Making

less warranted in certain situations. Embracing ethics relies on having a moral framework. We may make decisions based on what we believe is right and what is best for us, but not necessarily for everyone else. In some situations, we may make decisions with our hearts, and in other situations with our brains. In order to truly make conscientious decisions, we must process situations with both our heads and hearts. Being human is part of the dilemma that makes deciding difficult.

Cone in a Box

The Cone in a Box is a popular perspectives analogy that helps us understand why seemingly rationale people can disagree on the same topic and make differing decisions or conclusions. This example illustrates the risks when stakeholders are either provided partial information, or neglect to try and understand another's perspective.

Imagine a cone placed inside of a closed box with one hole cut in the top, and one hole cut in the side. If one person were to look in the hole on the top, they would see something that is round. If another person looks in the hole on the side, they would see a triangle. Neither individual has complete information, nor are they seeing the actual object for what it is with only their perspective. They may quickly disagree about what is inside the box, even though they saw the same object. However, if they were to share their information with one another, they could likely determine what they were seeing is a cone. When teammates and colleagues are able to share and



Conscientious Decision Making

appreciate one another's perspectives, we can reach much greater heights of understanding. Too often we dismiss another's idea when it is in contrast to our own when we fail to try to understand their perspective. This can be damaging to team goals, productivity, and relationships. When we find ourselves disagreeing with another, it behooves us to pause and question the possible reasons that our information may be in contrast. This should not be a judgment on one's character or competence, but rather a reconciliation of knowledge.

Faith

Each day we act upon decisions that are informed through a vast amount of experiences and gained material knowledge. We process loads of information and weigh our options on what we believe is accurate information. Our actions are guided by information, ethics, and belief systems (which may include filters or biases). The basis of decision theory is founded on the assumption that we can apply analytics and mathematics to help determine a "best" decision for a desired outcome, with a precarious assumption that all of our information is accurate. In his book *Blink*, Malcom Gladwell vividly describes a variety of research studies and applies the scientific method to uncover what guides our intuition or gut instinct. In this book, Gladwell also illustrates how and when to trust our intuition.

Even with our best application of analytics and guidance of keen intuition, each of us need to have faith. We need to



Conscientious Decision Making

have faith that something bigger than datasets and something more reliable than our gut instinct can guide us as leaders. For many, this comes in the form of religion or spirituality. For others it can be meditation, special friendships, or a general belief in karma. This section is not about any specific form of faith, but about the personalized power of its manifestations.

Throughout time, humans have existentially struggled with the unknown. Whether this is the debate about the beginnings of mankind, evolution, physics or the cosmos – there are many aspects of our current existence that are simply not understood. Some of these unknowns range from the trivial, such as trying to understand why we get goose bumps. Other struggles are far more profound and can cause angst, such as trying to understand the meaning of life.

When things become difficult in our personal and professional lives, faith is a critical ingredient to resiliency and perseverance. We must find comfort that a greater power, a colleague or loved one, karma or simply statistics will provide safety and support. Without faith, we will toil over the holes in logic or the void in a rationale. We cannot explain everything, and if we make and act upon decisions that informed by knowledge and intuition, and that are grounded in faith, we will function in a remarkably more optimistic and effective way. We will find the silver lining around the cloud, we will see the forest for the trees, and we will find the benefit when in doubt. Relying on faith is not soft nor is it a weakness – it is an acknowledgment that



Conscientious Decision Making

some things are beyond our control, and that vulnerability is acceptable. Faith creates comfort and confidence in times when we can otherwise crumble with uncertainty.

Finding our faith in something or someone reminds us that we cannot do everything ourselves, which keeps us necessarily humble. A lack of faith is exhausting and places a significant onus on oneself for all outcomes or in contrast, an absolute belief in fate – that everything is predetermined. If we believe that all outcomes are predetermined, it will lead to hopelessness, helplessness, and a feeling of apathy. It was once said that even people who believe in fate look both ways before crossing the road.

We should avoid assuming either absolute responsibility, or placing blind and utter faith in the world. Rather, we should find a balance between the things that we can influence, and those things that we cannot. Faith is inspirational and provides comfort during difficult times. We need to have faith that:

- People have good intentions and want to do well
- When we act with integrity, good things will happen far more often than bad things
- We cannot do everything by ourselves
- It is ok to make mistakes
- We can count on other people for support
- We will rebound when bad things happen
- Through experiences and over time, we will continually become stronger



Conscientious Decision Making

Faith can create a paradoxically intangible sense of comfort. It can be our pathway to discovering solutions and deeper meaning. We may not be able to see our touch faith, but we can feel its presence or absence. Faith is an essential component to leadership. It allows for individual fulfillment and the development of meaningful relationships.

Conclusion

It is an honor to have the means and ability to share ideas with others. The pages of this book are intentionally filled with known theories, quotes, and references from a variety of famous leaders, orators, philosophers, and researchers. While we can disagree with the opinions of others, we should not do so without both understanding and then articulating *why* we disagree. This book encourages critical thinking and the continued development of collective wisdom, some of which may contradict some of the aforementioned ideas, and some of which may have been reinforced by them.

We should also strive to constantly learn more and to challenge others to do the same. There are no “one size fits all” solutions for ethics, profitability, love, or performance. Develop an appreciation for conflict, and find better ways to do things. In many situations regarding important matters, if we are not slightly uncomfortable, we may not be getting the truth.

Leading with the head and heart is not about power and authority. This is about an evolution in the way in which we function that moves us beyond simply being results-driven. When we lead with the head and heart, we accomplish amazing things that meet personal, professional, and business objectives. It will create intangible fulfillment and have the potential to change the world. This text delivers knowledge and wisdom for the readers, yet it has also been an exercise for the writer.

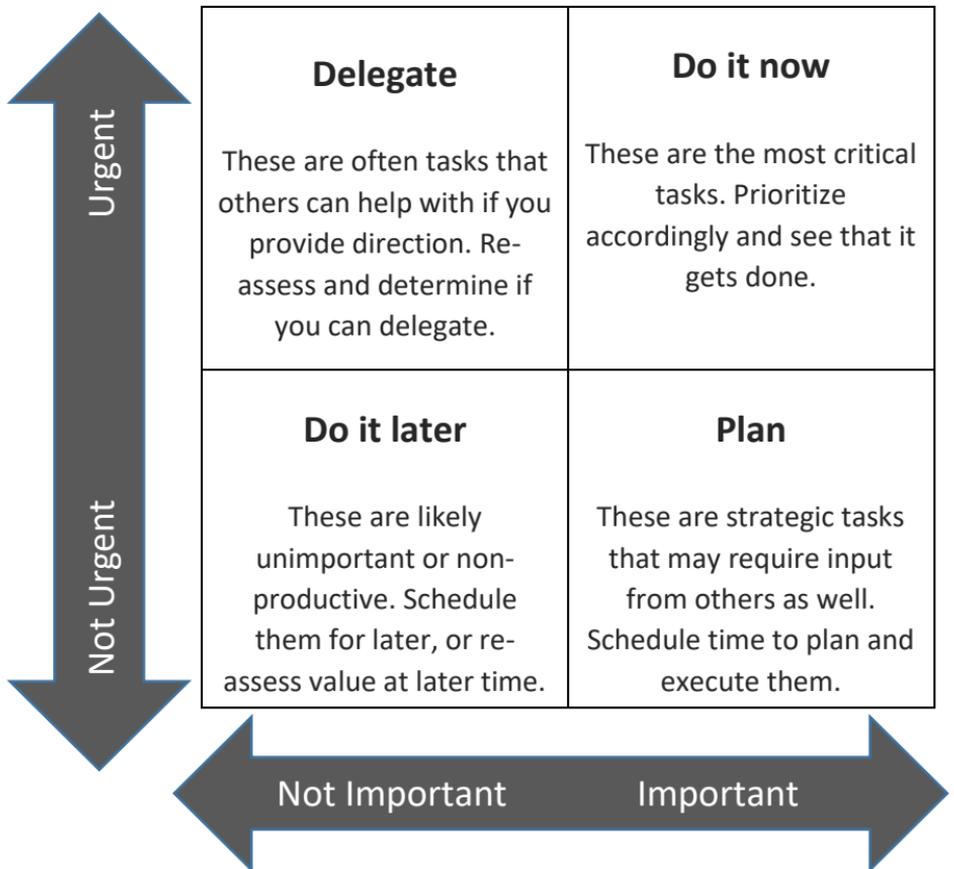
In classical Greek philosophy there is form of argument called *reductio ad absurdum*, which is Latin for “reduce to the absurd”. This mode of argument is used to either prove or disprove a thesis based upon showing a contradiction or ridiculous result. Too often we see leaders deploy shortsighted strategies meant to deliver long-term results. This can happen through naiveté, lack of awareness, coercion, or even draconian tactics. In the spirit of *reductio ad absurdum*, we cannot expect great results through poor attempts. We know through experience and research that leading with the head and heart requires in investment in oneself that will pay dividends to those around them. We cannot capitulate our values and ethics and expect successful long-term results. We must all continually strive not just occasionally do more, but to *always* do better.

Resources

Urgent vs Important Tasks

“What is important is seldom urgent and what is urgent is seldom important.”

- Dwight Eisenhower

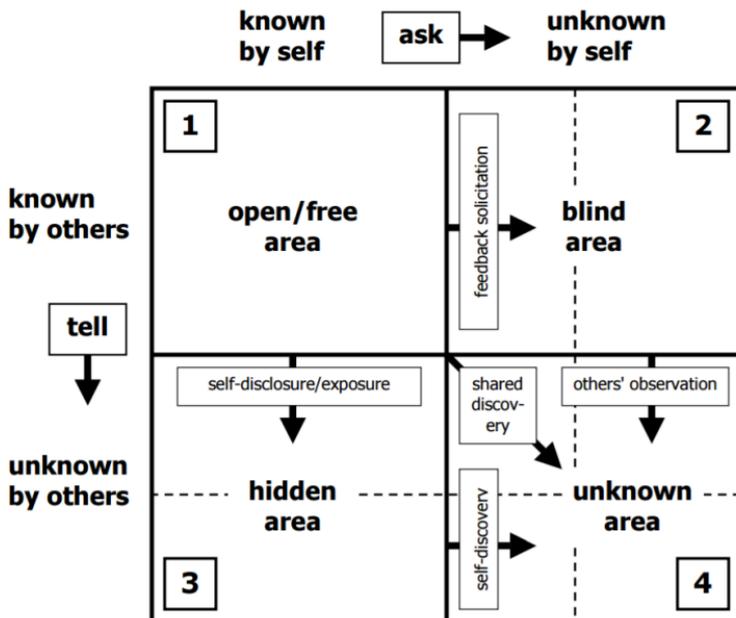


The Johari Window

The Johari Window is a communication model that is used to improve understanding between individuals. The word "Johari" is taken from the names of Joseph Luft and Harry Ingham, who developed the model in 1955.

There are two key ideas behind the tool:

- 1) That you can build trust with others by disclosing information about yourself.
- 2) That, with the help of feedback from others, you can learn about yourself and come to terms with personal issues.



Quadrant 1: Open Area

This quadrant represents the things that you know about yourself, and the things that others know about you. This includes your behavior, knowledge, skills, attitudes, and "public" history.

Quadrant 2: Blind Area

This quadrant represents things about you that you are not aware of, but that are known by others.

Quadrant 3: Hidden Area

This quadrant represents things that you know about yourself, but that others do not know.

Quadrant 4: Unknown Area

This last quadrant represents things that are unknown by you, and are unknown by others.

The End Goal

The ultimate goal of the Johari Window is to enlarge the Open Area, without disclosing information that is too personal. The Open Area is the most important quadrant, as, generally, the more your people know about each other, the more productive, cooperative, and effective they will be when working together.

The process of enlarging the Open Area quadrant is through self-disclosure, and it is a give-and-take process that takes place between yourself and the people that you are interacting with.

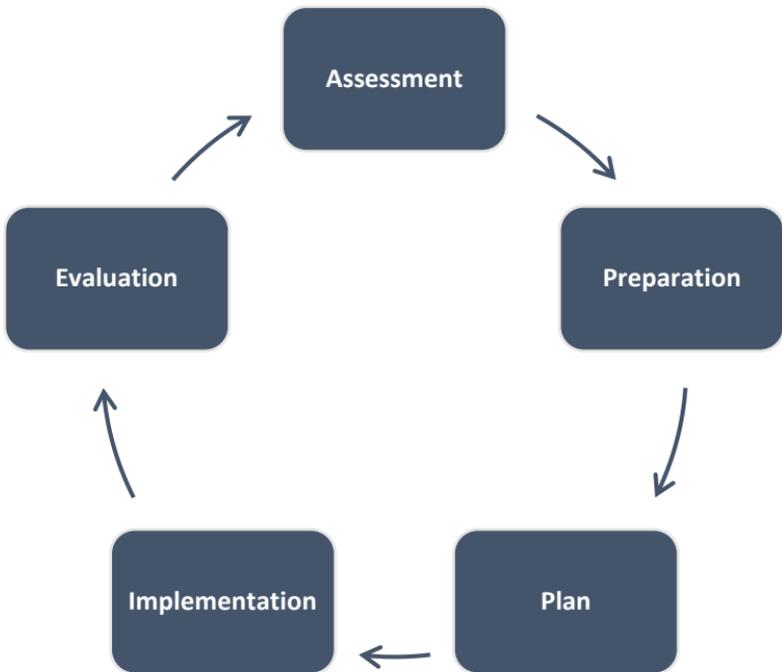
As you share information, your Open Area expands vertically and your Hidden Area gets smaller. As people on your team provide feedback to you about what they know or see about you, your Open Area expands horizontally, and your Blind Area gets smaller. Done well, the process of give and take, sharing, and open communication builds trust within the group.

People who have a large Open Area are usually very easy to talk to, they communicate honestly and openly with others, and they get along well with a group. People who have a very small Open Area are difficult to talk to, they seem closed off and uncommunicative, and they often do not work well with others, because they are not trusted.

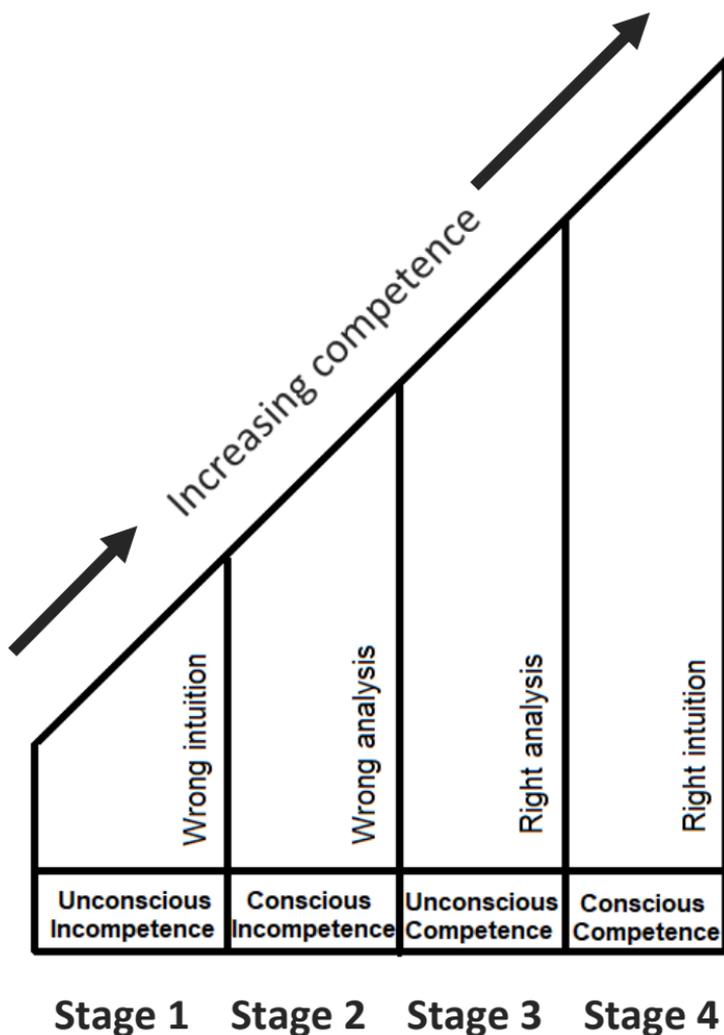
Other people might have a large Blind Area, with many issues that they have not identified or dealt with yet. However, others can see these issues clearly. These people might have low self-esteem, or they may even have anger issues when working with others.

Decision Making Process

"People do not resist change, people resist change they either do not understand or do not think is beneficial"



The Four Stages of Learning



Listen

When I ask you to listen to me
and you start giving advice,
you have not done what I asked.

When I ask you to listen to me
and you begin to tell me why I shouldn't feel that way,
you are trampling on my feelings. When I ask you to listen to
me and you feel you have to do something to solve my
problem,

you have failed me, strange as that may seem.

Listen! All I asked was that you listen.

Not to talk or do - just hear me.

Advice is cheap. Fifty cents will get you both Dear Abby and
Ann Landers in the same newspaper.

And I can do for myself. I'm not helpless.

Maybe discouraged and faltering, but not helpless.

When you do something for me that I can and need to do for
myself,

you contribute to my fear and weakness.

But, when you accept as a single fact that I do feel what I feel,
no matter how irrational, then I can quit trying to convince
you and get to the business of understanding what's
behind this irrational feeling.

And when that's clear, the answers are obvious
and I don't need advice.

Irrational feelings make sense when we understand
what's behind them.

So, please listen and just hear me. And if you want to talk,
wait a minute for your turn;
and I'll listen to you.

-Author Unknown

Philosophical Razors

Rationale principles used to shave off possible but unrealistic explanations:

Occam's Razor states that among competing hypotheses, the one with the fewest assumptions should be selected. Other things being equal, simpler explanations are generally better than more complex ones.

Hanlon's Razor says to never attribute to malice that which can be adequately explained by stupidity. Hanlon's story described the "devil theory" fallacy, explaining, "You have attributed conditions to villainy that simply result from stupidity."

Alder's Razor (or why mathematicians and scientists hate philosophy) states that what cannot be settled by experiment, is not worthy debating. Consider the following example:

"What would happen if an irresistible force acted on an immovable object?" My first response was that if the force was irresistible, then the object must move. "Ah," said the teacher, who had been here before, "but the object is immovable."

Hitchen's Razor states that the burden of proof regarding the truthfulness of a claim lies with the one who makes the claim and if this burden is not met, the claim is unfounded and its opponents need not argue further in order to dismiss it. What can be asserted without evidence can be dismissed without evidence.

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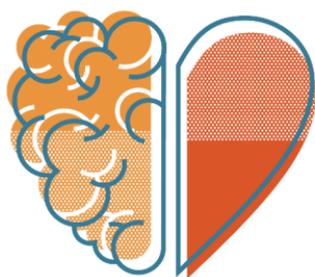
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Leading with the Head and Heart



About the author



Todd Archbold, LSW, MBA is a social worker, consultant, and health care executive. He began his career as a school counselor in Minnesota public schools. In 2006 he transitioned his passion to the mental health care treatment setting. Todd has experience working with children and families in a variety of settings including health care, education, and recreation/sports.

After earning his MBA in 2009, he began spearheading business development efforts by building and expanding mental health services, creating community partnerships, and focusing energy on community outreach and educational initiatives. These efforts have included the clinical and operational design and launch of clinics, hospitals, telehealth platforms, integrated care models, consultation programs, and residential services.

Todd has helped in new business ventures both private and non-profit, including authoring business plans, leadership structures, and financial modeling. He has served as a key executive and consultant to several organizations in the United States, the United Kingdom, and the European Union. His interest in education and technology has helped drive innovation and the promotion of evidence-based practices through avid market and clinical research.

Todd has been a part of several award-winning projects including recognitions for architectural design, innovations in patient care, new health initiatives, and community outreach. He has been honored in 2011 with the Patriot Award from the US Dept of Defense, in 2012 with the Leadership Award from PrairieCare, and in 2015 as an Emerging Leader from Minnesota Business Magazine.

