



Leading the Movement: CEO Talent Development

A Guide to Your Professional Development



**with CEO Success Profile, Competency Summaries and
Development Suggestions**

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for your improvement

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For the sake of linguistic simplicity in this product, where the masculine form is used, the feminine form should always be understood to be included.

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Introduction

What is the purpose of this guide?

Our Movement is driven by the shared belief that every young person deserves an equal chance to pursue their dream. As the landscape of this country and the profession of youth development have progressed, Boys & Girls Clubs have evolved to meet the ever-changing needs of youth and communities. As we look to the future, it is our duty and responsibility to ensure we continue to be relevant and make great futures possible for our nation's youth.

Building great futures demands great leaders and the highest quality talent at every level. It demands an unwavering commitment to continuously improving what we do, how we do it, and how we contribute as individuals. One of the most critical roles in our Movement is the Club Chief Executive Officer (CEO).

This guide provides detailed information about our CEO Success Profile and offers practical information about CEO development. Furthermore, the guide can be used as a companion to the many competency-based resources found in Spillett Leadership University. Leveraging this industry-leading competency research allows us all to use a shared language as to how we define and develop CEO talent at each and every Club.

What is the source of this guide?

This guide is sourced from the Korn Ferry FYI[®] for your development competency guide, which focuses on the Korn Ferry Leadership Architect[™], a global competency framework. The Korn Ferry Leadership Architect[™] was designed based on thorough, comprehensive, and rigorous analysis. This global competency framework was derived based on a combination of quantitative, qualitative, and market-based data, sourcing from Korn Ferry's own extensive data stores and external research literature sources.

Leveraging decades of expertise and knowledge from the hundreds of thousands of leadership assessments Korn Ferry has amassed, the development of the Korn Ferry Leadership Architect[™] was based on the following criteria and principles:

- Skills that matter most for performance.
- Skills that are most relevant in the 21st century context.
- Validity across global regions.
- A user-friendly framework.
- Content that can be used for multiple purposes including selection, development, performance, and competency modeling.

This CEO development guide highlights the 19 of the 38 competencies and 5 of the 10 stallers/stoppers that were identified as most critical when considering the success of the CEO.

Who should use this guide?

The CEO Development Guide can be used by anyone committed to the success of our CEOs. For development to be meaningful and have lasting impact, the CEO must take ownership of his or her development, be open to feedback, be willing to identify strengths and opportunities for improvement, and be willing to take action to improve. That does not mean our CEOs are on their own during this continuous improvement journey.

Boards

Boards must be engaged in every level of success for CEOs in order for our Movement to be successful. Offering constructive feedback, guidance and recommendations for specific development activities, identifying community resources for development, and ongoing input are but a few ways a Board can support CEO competency development. Board members can also leverage their own personal expertise to support the development of relevant competencies. A Board member with specialized financial skills could offer development for a CEO wanting to further build Financial Acumen, for example.

Human Resource and Training Professionals

Human resource (HR) professionals can help by engaging in robust development conversations with CEOs, supporting the construction of a development plan with specific outcomes, and monitoring and rewarding success. HR professionals can connect CEOs to local resources for developing critical competency areas. Spillett Leadership University provides numerous competency-specific resources that could be researched by HR professionals and, in partnership with the CEO, could inform a development strategy.

Directors of Organizational Development (DODs)

BGCA Directors of Organizational Development (DODs) provide direct support to CEOs, Boards and other Club professionals that are in place to support CEO development. Understanding the competencies, identifying opportunities for development, providing recommendations for development, and sharing best practices can all be part of the support infrastructure provided by DODs. DODs can also connect a CEO to relevant BGCA resources that can be used for development. In addition to DODs, other BGCA staff involved in CEO development are well versed in the Success Profile and can provide support in context of programs such as New Executive Orientation (NEO) or the Advanced Leadership Program (ALP) to name a few.

Chief Executive Officers

CEOs are ultimately responsible for committing to their own development. Numerous support systems exist but will be successful only if each CEO embraces and actively engages in a personal continuous improvement approach. This journey requires a fundamental belief that developing talent is a mission imperative.

A CEO should have an advanced familiarity with the Success Profile content. Understanding the competencies in the core profile, identifying those competencies most aligned to being successful

in light of organization or Club strategy, and being familiar with the defined behaviors of each competency, i.e., behaviors aligned to “what right looks like”, are critical to being successful.

Future Chief Executive Officers

Defining success for the CEO role not only supports the development of the CEO but also serves as clarity for those aspiring to be CEOs. Knowing which competencies are critical for that level allows a Club professional to consider including them in development planning.

What is the CEO Success Profile and how was it developed?

A success profile serves as the foundation for all talent management activities. By defining what right looks like, we can anchor our recruiting, development, coaching and other programs to one definitive source. The Profile defines not just the competencies but also key experiences, desired traits, and behaviors – if manifested – that might be harmful for success.

The development of the CEO Success Profile involved numerous participants from across the Movement to include current and former CEOs, DODs, and Board members. The discussion focused on what traits, drivers, experiences, and competencies are needed to drive our Movement into the future. The Profile was validated by workshop participants and additional CEOs, DODs and other members of BGCA leadership.

In addition, Korn Ferry conducted discourse analysis from CEO Success Profile discussions. Korn Ferry also mapped the selected CEO competencies with those identified as most strongly correlated with success at the mid-level leader level, now called “manager of managers.” Managers of managers are those who lead other managers within a business function or region.

The Success Profile applies to a job or a group of jobs. It describes what it takes to be successful. No person-specific data is displayed here.

Vision, Mission, Challenges, and Strategy

- The Boys & Girls Club Movement has a Mission to enable all young people, especially those who need us most, to reach their full potential as productive, caring, responsible citizens.
- Our Vision is to provide a world-class Club Experience that assures success is within reach of every young person who enters our doors with all members on track to graduate from high school with a plan for the future, demonstrating good character and citizenship, and living a healthy lifestyle.
- Our “Great Futures” Purpose is to inspire and empower Club youth to achieve success, and champion opportunities for all young people in America.
- Key challenges for a CEO include safety and risk management, driving engagement, diversity, and inclusion throughout organization (Board, Staff, Clubs), build community relations, and managing shifting priorities.
- Strategic goals are to use innovative ways to grow membership, continuously improve program quality and safety to increase the Club Experience, build strategic partnerships, advance a position of advocacy, philanthropy, and build awareness of the Movement.

Objectives and Key Responsibilities

- Build the capacity of existing staff and raise the level of expertise of those we bring into the organization.
- Ensure program quality and consistency.
- Leverage data for effective decision making.
- Enhance fundraising models and capability.
- Partner with Board to foster Organization/Club growth.
- Ensure effective safety strategies and policy for staff and members

Experience Requirements

- Board management/engagement
- Business and financial management
- Leadership
- Data analytics
- Fundraising/Sales
- Organization turn-around/failure-correction

Competencies

Thought Leadership

- Business Insight
- Cultivates Innovation
- Decision Quality
- Financial Acumen
- Balances Stakeholders
- Strategic Mindset

Results Leadership

- Ensures Accountability
- Resourcefulness
- Drives Results
- Plans and Aligns

People Leadership

- Collaborates
- Communicates Effectively
- Develops Talent
- Builds Networks
- Builds Effective Teams
- Drives Vision and Purpose

Self Leadership

- Manages Ambiguity
- Being Resilient
- Instills Trust

Stallers and Stoppers

- Poor Administrator
- Lack of Ethics and Values
- Failure to Build a Team
- Non-Strategic
- Political Misteps

Safety has always been our #1 Priority, striving to set a new standard for safety and protection of all young people is critical and requires special focus not only in policy and process but also in leadership development. This document provides specific safety-related behaviors and their alignment to the Korn Ferry Competency Architecture to better support development in this critical area.

COMPETENCY ALIGNMENT TO SUCCESS PROFILE	CEO - SAFETY FOCUSED COMPETENCY BEHAVIORS
<p>When thinking about development focused on Safety and its associated behaviors, you can use the aligned competencies below to dig deeper by reviewing the competency in your CEO Development Guide and identifying ways to develop or expand your capabilities.</p>	<p>The following Competency Behaviors provide you with language specific to Physical/Emotional Safety and Trauma Informed Practices. This gives you the ability to consider your professional development targeting these critical areas.</p>
<p>Ensures Accountability - <i>Holding self and others accountable to meet commitments.</i></p>	<ul style="list-style-type: none"> • Serves as a role model to Club professionals and program volunteers for safety excellence to include and upholding core values, standards, and principles.
<p>Plans & Aligns – <i>Planning and prioritizing work to meet commitments aligned with organizational goal.</i></p>	<ul style="list-style-type: none"> • Has knowledge of and a commitment to the impact that trauma has on their workforce, community and youth and recognize the prevalence of trauma and its impact. • Leads a continuous quality improvement process in which Club safety and well-being policies, regulations, structure, processes, and practices are assessed and improved upon to support a culture of safety and well-being at all levels of the organization.
<p>Communicates Effectively - <i>Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.</i></p>	<ul style="list-style-type: none"> • Ensures the organization has a policy or position statement, endorsed by Board and CEO leadership, that includes a commitment to trauma-informed principles and practices - policy/position statement identifies the relationship between trauma and programming, and the implications for service access and design.
<p>Strategic Mindset - <i>Seeing ahead to future possibilities and translating them into breakthrough strategies.</i></p>	<ul style="list-style-type: none"> • Ensures the safety and well-being of staff, youth and the overall organization is embedded in the broader strategic plan; considered in all operational decisions; and included in the alignment of resources to impact quality Club safety. • Demonstrates the ability to articulate, follow, and monitor adherence to health and Club safety policies and regulations by translating knowledge and information into Club safety plans, with measurable immediate and long term goals, maintaining oversight on progress toward these goals, and holding Club professionals responsible for achieving goal outcomes.
<p>Drives Results - <i>Consistently achieving results, even under tough circumstances.</i></p> <p style="text-align: center;">&</p> <p>Collaborates - <i>Building partnerships and working collaboratively with others to meet shared objectives.</i></p>	<ul style="list-style-type: none"> • Collaborates with board members on a Club safety system that cascades throughout the organization by leading the creation and approval, monitoring, and reporting of a plan and framework that includes: risk management principles; protection of liabilities and/or reputational risks; crisis management and communications; complaints and incident investigation; and resources/supports for survivors and families. • Ensures the establishment of informative measures of Club safety data, data collection and analysis to assess current and past performance and inform targeted health and Club safety improvements.
<p>Instills Trust - <i>Gaining the confidence and trust of others through honesty, integrity, and authenticity.</i></p>	<ul style="list-style-type: none"> • Ensures Club safety mechanisms are in place for implementing transparency, public accountability and for upholding positive, trusting relationships with diverse stakeholders, internally and externally.
<p>Develops Talent - <i>Developing people to meet both their career goals and the organization's goals.</i></p>	<ul style="list-style-type: none"> • Assesses individual and collective strengths of Club staff against the knowledge, skills and information needed to fulfill roles pertaining to safety and well-being and to identify development opportunities accordingly.

Korn Ferry Leadership Architect™ Global competency framework

Below is the full Korn Ferry Leadership Architect™ global competency framework. Highlights indicate the 19 competencies and five stallers/stoppers selected for the CEO success profile.

FACTOR I: THOUGHT

A. Understanding the business

5. Business insight

11. Customer focus

17. Financial acumen

35. Tech savvy

B. Making complex decisions

8. *Manages* complexity

12. Decision quality

32. *Balances* stakeholders

C. Creating the new and different

18. Global perspective

19. *Cultivates* innovation

33. Strategic mindset

FACTOR II: RESULTS

D. Taking initiative

2. Action oriented

27. Resourcefulness

E. Managing execution

15. Directs work

25. *Plans and aligns*

38. *Optimizes* work processes

F. Focusing on performance

1. *Ensures* accountability

28. *Drives* results

FACTOR III: PEOPLE

G. Building collaborative relationships

6. Collaborates

9. *Manages* conflict

20. Interpersonal savvy

21. *Builds* networks

H. Optimizing diverse talent

4. Attracts top talent

13. *Develops* talent

14. *Values* differences

34. *Builds effective* teams

I. Influencing people

7. *Communicates effectively*

16. *Drives* engagement

23. Organizational savvy

24. Persuades

37. *Drives* vision and purpose

FACTOR IV: SELF

J. Being authentic

10. Courage

36. *Instills* trust

K. Being open

29. *Demonstrates* self-awareness

30. Self-development

L. Being flexible and adaptable

3. *Manages* ambiguity

22. Nimble learning

26. *Being* resilient

31. Situational adaptability

CAREER STALLERS AND STOPPERS

M. Trouble with people

102. Blocked personal learner

103. *Lack of ethics and values*

110. *Political missteps*

N. Doesn't inspire or build talent

101. *Poor* administrator

104. *Failure to build a team*

105. Failure to staff effectively

O. Too narrow

106. Key skill deficiencies

107. *Non-strategic*

108. Overdependence on an advocate

109. Overdependence on a single skill



Using the Success Profile as the Basis for Development

For purposes of development, we will focus on the competencies in the CEO Success Profile. There are 19 competencies in the Profile. It is not expected – nor is it a best practice – that you focus on the development of all 19 competencies at one time. Development takes time and effort. You need time to identify specific development goals and new behaviors, to engage in a new or changed behavior, to evaluate the impact of the new behavior, and to make course corrections and updates as needed.

1. Take a Leadership Assessment and Get Input

BGCA has prepared Leadership Assessment opportunities based on the CEO Success Profile in Cornerstone. Allowing you an opportunity to assess and reflect on your leadership strengths and areas for improvement around the 19 competencies. There are two opportunities to do so:

1. New Executive Orientation – a self-assessment for those who have been in the role for less than one year
2. Talent Development Process – a combined self-assessment and board chair assessment for those who have been in the role for more than one year. Having the board chair weigh in should drive meaningful conversations around development for you.

2. Focus Your Development Efforts utilizing FYI Resources

The 19 competencies reflect the foundation of the CEO role. There may be key initiatives or challenges within your organization/Club that cause you to focus on a smaller subset for purposes of development. All competencies remain relevant for the CEO role but honing the competencies for your particular environment can be a useful way to begin.

There are many ways to further focus your development energy on 2, maybe 3 competencies and the related behaviors. For example:

- Review results of self-assessment which can be found in [Spillett Leadership University](#).
- Review the competencies and associated behaviors from your self-evaluation. Reflect on your experiences. Be thoughtful and honest about your own strengths and opportunities for development.
- Utilize the FYI Resources (in this document) to think deeper about your selected competencies, to consider root causes, understand what skilled looks like, and review tips for development
- Ask! A conversation with your DOD, peers, staff members, Board members and others you frequently interact with can be illuminating. With a few simple questions, those in our professional environment are likely willing to give constructive feedback. Share the profile with others so everyone is looking at the same competency language.
 - “I’m wanting to spend time focused on my development and would appreciate your honest feedback on things I can be doing better...”
- www.kornferry.com continuously updates their online resource center with new videos, articles and webinars

3. Consider Developmental Difficulty and Population Skill Rating

All competencies are not created equal. Some are harder for people to develop than others. The matrix on the next page shows, on a five-point scale, how difficult it would be for a typical professional person to develop any of the 19 Competencies. The matrix also shows the average skill rating of the average population for each competency. This information lets you know what you’re up against so you can adjust your development plan, remedies, and time line accordingly. As you put your plan together:

- Take into account how difficult it is to develop the competencies you are considering building into your plan. As you prioritize, keep in mind that focusing on several competencies that are harder or hardest to develop could mean you are overloading yourself. Focus on those that are critical to your success or those that might be considered “low hanging fruit” where you and others can see meaningful improvements quickly.

The matrix includes the 19 competencies identified in the CEO Success Profile.

		AVERAGE SKILL RATING/SUPPLY OF GENERAL LEADER-LEVEL POPULATION		
		LOW	MEDIUM	HIGH
DEVELOPMENTAL DIFFICULTY	HARDEST	19. Cultivates innovation 33. Strategic mindset	3. Manages ambiguity 21. Builds networks 34. Builds effective teams	
	HARDER	13. Develops talent 37. Drives vision and purpose		
	MODERATE		5. Business insight	26. Being resilient
	EASIER		1. Ensures accountability 7. Communicates effectively 12. Decision quality 32. Balances stakeholders	6. Collaborates 27. Resourcefulness
	EASIEST		25. Plans and aligns 17. Financial acumen	28. Drives results 36. Instills trust

4. Consider Substitutes and Compensators

For various reasons, you might not want to work to develop a competency directly. Yet a weakness in this area will have some negative effects on your success. You can use other competencies to cover for, substitute for, or neutralize the negative effects of the lack of the skill. Because substitutes are more behaviorally similar, they are able to cover for the area that is lacking.

Competencies contribute to your success. Overuse of competencies, however, may create noise and become counterproductive in certain circumstances. When a competency is overused, you may add some other competencies to compensate for the overused strength and reduce any damage that might be caused by the overuse.

The table on the next page identifies the competencies in the CEO Success Profile and the associated substitutes and compensators. For any given competency that you wish to develop or need to neutralize the effects of overuse, you do not need to focus on all listed substitutes or compensators. Explore and identify those that align most to your current development needs.

Factor	Competency	Substitutes	Compensators
Thought Leadership	Business Insight	Manages Complexity, Decision Quality, Financial Acumen, Global Perspective, Strategic Mindset	Develops Talent, Interpersonal Savvy, Demonstrates Self-awareness, Self-development, Tech Savvy
	Cultivates Innovation	Decision Quality, Nimble Learning, Strategic Mindset, Tech Savvy, Drives Vision and Purpose	Manages Conflict, Financial Acumen, Interpersonal Savvy, Organizational Savvy, Demonstrates Self-awareness
	Decision Quality	Manages Complexity, Plans and Aligns, Drives Results, Balances Stakeholders, Strategic Mindset	Develops Talent, Interpersonal Savvy, Demonstrates Self-awareness, Self-development, Tech Savvy
	Financial Acumen	Business Insight, Manages Complexity, Global Perspective, Drives Results, Strategic Mindset	Manages Ambiguity, Collaborates, Develops Talent, Drives Engagement, Interpersonal Savvy
	Balances Stakeholders	Manages Conflict, Decision Quality, Builds Networks, Organizational Savvy, Persuades	Ensures Accountability, Financial Acumen, Nimble Learning, Drives Results, Strategic Mindset
	Strategic Mindset	Business Insight, Decision Quality, Global Perspective, Cultivates Innovation, Drives Vision and Purpose	Action Oriented, Directs Work, Interpersonal Savvy, Balances Stakeholders, Instills Trust
Results Leadership	Ensures Accountability	Action Oriented, Courage, Decision Quality, Directs Work, Drives Results	Communicates Effectively, Cultivates Innovation, Interpersonal Savvy, Persuades, Demonstrates Self-awareness
	Resourcefulness	Ensures Accountability, Action Oriented, Directs Work, Plans and Aligns, Optimizes Work Processes	Customer Focus, Values Differences, Global Perspective, Interpersonal Savvy, Tech Savvy
	Drives Results	Ensures Accountability, Action Oriented, Decision Quality, Plans and Aligns, Resourcefulness	Communicates Effectively, Values Differences, Drives Engagement, Interpersonal Savvy, Instills Trust
	Plans and Aligns	Ensures Accountability, Decision Quality, Directs Work, Resourcefulness, Optimizes Work Processes	Manages Ambiguity, Customer Focus, Cultivates Innovation, Interpersonal Savvy, Builds Networks
People Leadership	Collaborates	Manages Conflict, Values Differences, Interpersonal Savvy, Builds Effective Teams, Instills Trust	Action Oriented, Courage, Cultivates Innovation, Drives Results, Tech Savvy
	Communicates Effectively	Collaborates, Values Differences, Interpersonal Savvy, Persuades, Situational Adaptability	Action Oriented, Business Insight, Courage, Drives Results, Tech Savvy
	Develops Talent	Attracts Top Talent, Directs Work, Drives Engagement, Builds Effective Teams, Drives Vision and Purpose	Action Oriented, Financial Acumen, Builds Networks, Nimble Learning, Tech Savvy
	Builds Networks	Communicates Effectively, Interpersonal Savvy, Organizational Savvy, Persuades, Situational Adaptability	Ensures Accountability, Plans and Aligns, Drives Results, Instills Trust, Optimizes Work Processes
	Drives Vision and Purpose	Communicates Effectively, Drives Engagement, Cultivates Innovation, Persuades, Strategic Mindset	Action Oriented, Customer Focus, Plans and Aligns, Resourcefulness, Instills Trust
	Build Effective Teams	Collaborates, Develops Talent, Values Differences, Directs Work, Drives Engagement	Action Oriented, Manages Ambiguity, Business Insight, Drives Results, Optimizes Work Processes
Self Leadership	Manages Ambiguity	Decision Quality, Nimble Learning, Being Resilient, Situational Adaptability, Strategic Mindset	Financial Acumen, Plans and Aligns, Drives Results, Tech Savvy, Optimizes Work Processes
	Being Resilient	Action Oriented, Manages Ambiguity, Manages Conflict, Decision Quality, Situational Adaptability	Business Insight, Cultivates Innovation, Builds Networks, Strategic Mindset, Optimizes Work Processes
	Instills Trust	Ensures Accountability, Collaborates, Communicates Effectively, Values Differences, Demonstrates Self-awareness	Global Perspective, Cultivates Innovation, Builds Networks, Nimble Learning, Drives Vision and Purpose

5. Align your Organization's Strategic Goals

Development is not always about developing from a “weakness” to a “strength”. Development is sometimes about increasing capability in something you are already doing well because the competency is strategically important for your organization/Club. Development can also be about pulling back on competencies that you potentially overuse. It may seem counterintuitive but more of a good behavior isn't always better. Overusing a competency such as *Collaborates* can be seen by others as a reluctance to make decisions.

6. Build Your Development Plan

Regardless of where you are on your development journey, you just need to bring the insight and motivation to do your best for your community, your Club staff and the youth that come through your doors every day. There is an entire Movement standing ready to support your success. Your first step is be clear about what great looks like using the language of competencies and familiarize yourself with the resources available to develop them. BGCA has adopted the 70-20-10 Development Model where 70% of learning comes from creating and engaging in challenging on-the-job experiences, 20% comes from developmental relationships like a coach or mentor and 10% comes from training or coursework. After you have familiarized yourself with this guide you can access [Spillett Leadership University](#) where you will find various tools, resources and training that supports your growth using this development model. A sample 70-20-10 worksheet can be found on the last page of this guide. Similar tools and resources can be found in Spillett Leadership University.

7. Reassess and Recalibrate

Remember development takes time but when the time is appropriate, potentially after a year, take the assessment again and re-evaluate your development needs.

Your Development Journey

Finally, remember that you are not alone. Engage regularly with your Board, your peers, your DOD, the Leadership Development Team, along with BGCA. We are all invested in your success.

Good Luck!

Navigating the Competencies and Stallers –

The remainder of this guide presents the 19 competencies and five stallers/stoppers included in the CEO Success Profile. Each competency will provide you the following information:

- **Definition** of the competency.
- **Context** – Gives you the lay of the land. The Context reviews the general case for the competency, how it operates, and why it's important.
- **Quotes** – Each chapter has two quotes to inspire you and to give you food for thought.
- **Skilled** definitions provide a list of examples that show what “skilled” looks like for a competency. Compare yourself to the Skilled definition. What would you like to be able to do when you're done working on this need? This is your “after” picture.
- **Less skilled** definitions provide a list of examples that show what being weaker in this competency looks like. Read these to see if you may be lacking skill in a competency. Which bullet points describe you the best? This is your “before” picture.
- **Talented** definitions describe what excelling in this competency looks like. Read the examples to see which, if any, describe the way you operate.
- **Overused** skill definitions provide a list of examples that describe when skill in a competency is overused. Refer to these to determine whether you might be overusing one of your strengths.
- **Some possible causes** of lower skill – We list numerous reasons why you might have this need. Check the causes that could apply to you. Many developmental efforts have floundered because the plan attacked the wrong problem. Write down your particular need—what it looks like, what causes it, whom it plays out with and in what situations. If your causes aren't listed, add them to the list.
- **Callout** – We've included a short case study in each chapter to bring the competency to life. “Did you know?” provides interesting facts from KF research. “Does it best” describes a person or organization that is well recognized for their strength in the competency, and “Culture card” identifies how cultural factors impact the competency. We've also included “Brain boosters,” which are full of facts and information from a neuroscience perspective.
- **Development tips** were developed from research on competencies—what experiences teach them, what they look like, what their elements are. They are also tested ideas from working with executives on what's getting in their way and how to fix it. These tips are brief, doable, and action oriented. Ten or more tips are included to work directly on a need. Although a few may be longer-term, many are things you can start working on today. Based on research and experience, these are the tips that are most likely to work. Choose one or two of these to include in your development plan.
- **Want to learn more?** Take a deep dive... Interspersed with the development tips are some resources to help you explore developing the competency further. They range from video clips to journal articles to websites that will allow you to dive more deeply into some of the areas covered by the tips.

- **Job assignments** denote situations that require application of certain competencies. Research shows that 70% of development happens on the job, and jobs differ in development power and in the competencies they address. You can't always change jobs for development reasons alone, but there is almost always a job assignment that you can select in your current role to address your development need.
- **Boys & Girls Clubs** specific job assignments can be found in the blue box
- **Take time to reflect...** leaves you with some thought-provoking statements regarding things you might want to consider as you develop the competency. Read these to see which areas of concern relate to you and take some inspiration from the guidance offered.
- **Learn more about...** provides a small number of texts selected from expert reviews, best-seller lists, and reputable publishers that will support your development in the competency. We chose them because they're current and full of practical suggestions. We've also provided the links to the deep dive resources referenced earlier in the chapter. So, there's a wide variety of resources to help you develop each competency.
- **Recommended search terms** – In case you'd like to search the web for additional guidance on developing the competency, we have provided some search terms to get you started.
- **More help...** All of the links provided in the deep dives interspersed throughout the development tips are available at this location. Additional resources and insights are also provided to further your development. Keep the site open while reading for easy access to the resources associated with development tips that resonate with you.

Ensures Accountability

Holding self and others accountable to meet commitments.

Taking responsibility. Owning up to commitments. Being answerable for your actions and the actions of those you lead. All fall under the umbrella of accountability. Being accountable and ensuring accountability in others is as important in and out of work today as ever. Important and a little scary. Why? Being accountable makes you more visible and more open to criticism. It means putting yourself at risk. All eyes are on you. If the assignment, project, or strategy fails, you're on the hook for it. And in this hyperconnected, hypervigilant world, there's no place to hide. But when it comes to ensuring that accountability thrives in your organization, absorbing the risk can pay off in multiple ways. On critical projects, it instills confidence in others when they know you have a vested interest in the positive outcome they are all striving toward. Taking the same responsibility for a losing strategy as you do for a winning one shows others that you stand behind your decisions. This builds a culture of accountability around you. A culture where people own their decisions and their actions. Where credit is shared and blame accepted. By ensuring accountability in yourself and leading so others do the same, you are more likely to be trusted and respected by others. More likely to speak out when there is a problem. More likely to be committed to your work. More likely to deliver high performance. More likely to succeed.

"I attribute my success to this – I never gave or took any excuse."

Florence Nightingale – English social reformer and founder of modern nursing

Skilled

- Follows through on commitments and makes sure others do the same.**
- Acts with a clear sense of ownership.**
- Takes personal responsibility for decisions, actions, and failures.**
- Establishes clear responsibilities and processes for monitoring work and measuring results.**
- Designs feedback loops into work.**

Less skilled

- Fails to accept a fair share of personal responsibility.
- Gathers little information about how things are going.
- Provides inadequate feedback; fails to help others adjust course midstream.
- Prefers to be one of many accountable for an assignment.

Talented

- Assumes responsibility for the outcomes of others.
- Promotes a sense of urgency and establishes and enforces individual accountability in the team.
- Works with people to establish explicit performance standards.
- Is completely on top of what is going on and knows where things stand.
- Provides balanced feedback at the most critical times.

Overused skill

- May not give appropriate credit to others.
- Strictly enforces accountability; doesn't consider situations that are beyond individuals' control.
- Focuses too much on numbers and hard data; measurement becomes a goal and a pursuit of its own.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Ensures* accountability. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Not goal oriented.
- Afraid of making a mistake.
- Low self-confidence.
- Narrow comfort zone.
- Lacks commitment.
- Unsure how to measure performance.
- Disregards the bigger picture.
- Shies away from tough problems.
- Has unrealistic expectations.



Culture card

Accountability plays out differently in different cultures. Collaborating across international boundaries means recognizing and respecting this. A Brazilian team working with an American team might feel the tension of different priorities. Both may take responsibility for performance excellence. Both may have a sense of urgency. But both see different things as critical. To a Brazilian, relationships are seen as paramount to delivering the result. Too much planning gets in the way of that. The American is likely to see the project plan as essential. Socializing is not essential to the task and may even get in the way. Accountability to the process versus accountability to the people. One culture doesn't want to fail people. The other doesn't want to fail the plan. So how do cross-cultural teams reconcile their different views of accountability? Through recognition of differences. Appreciation of what's valued by others. Willingness to compromise and adapt. The Brazilian team could position a project plan as integral to forging a relationship with their colleagues. The American team could invest more time socializing and connecting. Establishing common accountability across cultures means accommodating what is most important to others.¹

Tips to develop *Ensures* accountability

1. **Unsure of the target? Establish clear goals.** How can you take charge of where you're headed unless you know your destination? Before you can take accountability for anything, you need to know what's expected. Have a set of clearly articulated goals that specifically states the outcome required and defines your target result—a clear picture of what success looks like. Goals help focus time and effort. They make things fairer. They provide an objective way to measure someone against what's required of them. They can be used to stretch people. Learn how to create SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals. Set SMART goals for projects and other work tasks when you assign them to yourself or others.

2. **Tend to put things off? Identify procrastination triggers.** Procrastination is a common way of avoiding responsibility or putting off dealing with a situation. Often, it means that someone else has to take responsibility. Others may start to see you as unreliable. Not accountable. Identify why you procrastinate. Slow to act because you don't think you're up to the task? Talk it through with someone who will bolster your confidence. Waiting until you have 100% of the information and resources you need to get started? Start doing the things you can do with the resources you have. Find it too overwhelming? Break it down into smaller, more manageable pieces. Commit to doing a piece a day. Don't even think of the larger goal. Just do something on it each day. Do you find the task boring? Focus on the sense of achievement you will have from getting it done and off your desk. Or is it something else? Once you understand why you put things off, you can take steps to fix the problem. Support others in identifying their reasons too.
3. **Afraid to fail? Redefine success.** Need things to go right the first time? Have to finish what you've started? Must complete tasks and wrap them up into nice neat packages? View it as failure if you are unable to do this 100% of the time? Things won't always go right the first time. As John F. Kennedy once said, "Nothing worthwhile has ever been accomplished with a guarantee of success." Often, things worth doing take repeated effort. A midcourse correction might be needed. Sometimes it's right that a task be abandoned, never finished. Develop a philosophical view of failure. Change your internal reward system from one that only celebrates completion to one that recognizes effort. Give yourself credit for successfully moving things forward incrementally. Praise yourself for seeking feedback and fixing mistakes. Have the courage to rethink the plan. Salute your bold decisions to change direction or halt if it is the right thing to do.
4. **Unsure why your contribution matters? Find the connection.** It can be hard to engage your head and heart if you can't see how your efforts fit into the big picture. Everyone needs a clear line of sight from their personal goals to the goals of the organization. Make it your business to learn all you can about the vision, the overall objectives, the future direction. Read the mission statement and annual reports. Talk to people who know. Then find a way to articulate how your responsibilities fit in. How you contribute to success through the tasks you do each day. Why your efforts matter. Take pride in the fact that you're responsible for the achievement of something bigger than yourself and your immediate team.

Want to learn more? Take a deep dive...

Ashkenas, R. (2012, July 9). Seven mistakes leaders make in setting goals. *Forbes*.

Chua, C. (2010, June 3). *11 Practical ways to stop procrastinating*. Lifehack.

Doheny, K. (2008). *Strategies to reduce perfectionism*. Psych Central.

Mind Tools. (n.d.). *Helping people take responsibility*. Mind Tools.

5. **Stuck in first gear on a new assignment? Focus to move forward.** Write down where you are now and where you want to be. Ask yourself: What are the benefits of achieving this goal? What do I need in order to succeed? How will I get there? What paths could I take? Who else needs to be involved? What could help/hinder my progress? How else could I achieve the required outcome? Write down your answers. Use them to create actions. Start with what *you* will do *now*. Break big action steps into a few smaller, more manageable ones. Arrange them in chronological order. Give yourself a date by which each will be accomplished. Hold yourself accountable for each one. Review your progress regularly and tick them off as you go. Use your plan to stay on top of what is going on.

6. **Need to stay focused? Monitor progress regularly.** How will you know you've delivered a successful outcome? What will you see? Hear? Feel? How will you know you're on track? What formal and informal metrics will you use to measure progress? Take a look at what you're responsible for. Can you confidently answer each of those questions? If not, spend time clarifying. Discuss with others where you need to. Set up a process to monitor progress toward goal achievement. Be creative. Explore using visual aids. Maybe a thermometer or a running track with a finish line. Show progress as you go. Create a sense of urgency by showing "hot spots" or where standards are slipping. Indicate key milestones. Celebrate as each one is reached. Display team or departmental goals and visual aids on the wall—somewhere prominent, where everyone will see them. If you are setting goals for others, involve them in defining success measures. They'll often come up with measures that are important to them and that are different from formal measures. Monitoring progress must motivate, so let them decide what will spur them on.
7. **Not sure how you're doing? Find ways to gauge your impact.** It's up to you to ensure you're doing the right things, at the right time, in the right way. That you're delivering to the required standard. Causing the right outcomes. Having the right impact on others. As well as using formal measures to monitor how you're doing, introduce feedback loops into your work. Invite others to comment on the impact of your actions and behaviors as they experience them. The faster and the more frequent the cycles, the more opportunities you have to learn. Reflect on what you learn. Evaluate the feedback in line with what you need to achieve. Make necessary adjustments.
8. **Don't like asking for help? Cast pride aside.** If you find it difficult to ask for help, try to establish why. Perhaps you see it as a sign of weakness? Feel you should be able to deal with situations alone? The fact is that sometimes two (or more) minds are better than one. It's likely you often won't have all the answers. Especially when it comes to dealing with tough problems. Ask for help when you need it; don't wait for a crisis to occur. When it is offered, accept it in good faith. You'll gather more information. Gain a broader perspective of the issue. Be better equipped to make the right decisions. Able to act more quickly. Learn new ways of operating. Start seeing the value of interdependence with others. Remember that asking for and accepting help from others does not make you less accountable. It also doesn't mean you are shirking responsibility. It means you're committed to doing the best job you can.

Want to learn more? Take a deep dive...

Fox, J. (2013, December 13). You can get some big things done when it's not all about you. *Harvard Business Review Blog Network*.

The Muse. (2012, September 20). The right way to ask for help at work. *Forbes*.

Vanderkam, L. (2012, June 12). What the most successful people do before breakfast. *Fast Company*.

Wilson, H. J. (2012, April 2). Employees, measure yourselves. *The Wall Street Journal*.

9. **Run away from mistakes? Own up to them.** Everyone makes mistakes. Mistakes go with being human. When a mistake happens, it's tempting to cover it up, get defensive, or even go on the attack. Avoid the blame game, whether it's blaming circumstances or, worse, placing the blame on someone else. Admit your mistake early. Make it public. Especially if the error could impact other people or other projects. Let people know quickly to limit the damage. You may have created the problem; now become part of the solution. You can't change what happened, but you can help make it right. Talk about the mistake matter-of-factly. One way to get some good from a misstep is to always ask, "What can I learn from this?" Turn a bad situation into a valuable lesson—don't waste it. Apply what you have learned so the mistake does not

happen again. Make learning from mistakes a good habit. Move on, don't dwell on it. Learn to be more comfortable admitting your mistakes. Don't run for cover, face the music. In doing so, you'll encourage others to do the same.

10. Assured you're doing a good job? Do it better. When you're consistently meeting the required standards of performance, it's easy to get comfortable. Complacent. To get stuck in a routine of doing what you've always done. And why not? After all, you're doing a good job, right? While the answer to that may be yes today, over time it is likely to become no. Don't get left behind. Raise your personal standards. Set stretching goals. Push yourself to the next level of success. Proactively find ways that you can do an even better job. Challenge limiting beliefs about what you can achieve. Have the courage to step outside your comfort zone. It's where you'll reap the biggest rewards.

11. Shy away from giving feedback? Learn the principles of constructive feedback. Honest feedback lets people know how they are performing. It can confirm they are meeting the expected standards. Or it can let them know they are falling short. Keep it factual. Talk about behaviors—the things you have seen and heard the person do. Don't make statements about their identity—who they are or their values. Be specific about what has gone well and what needs adjusting. Guide them to make midcourse corrections. Give the feedback “in the moment”—while the event is still fresh enough for your comments to resonate. Don't put it off for days or weeks. Point out an error before it becomes a problem. Remember, feedback should be balanced when it makes sense. Catch people doing something right. Make giving regular feedback a priority. Being accountable for giving feedback helps others become accountable for their own actions.

Want to learn more? Take a deep dive...

Klobucher, T. (2011, October 24). The danger of complacency in the workplace. *The Great Workplace Revolution* [YouTube].

Llopis, G. (2013, July 8). 10 Signs your employees are growing complacent in their careers. *Forbes*.

White, S. (2011, October 13). Overcoming work mistakes: Learn how to speak up and move on. *The Huffington Post Canada*.

Zenger, J., & Folkman, J. (2014, January 15). Your employees want the negative feedback you have to give. *Harvard Business Review Blog Network*.

Job Assignments Specific to Your Role

- Work on a project that analyzes performance and impact of a system, take responsibility for providing feedback to those involved.
- Design a set of formal and informal measures of progress for your current responsibilities. Share them with your Board Chair or Exec Committee. Review your progress on an ongoing basis.

Additional Job Assignments

- Put yourself forward to lead the resolution of a tough problem that requires help from others. Recognize what others have to offer and how they can support you.
- Volunteer to present a proposal to a senior team that you know will provoke contention, raise challenging questions, and encourage debate. Be prepared to fight your corner.
- Volunteer to lead the definition of SMART goals for a new or evolving project.

Take time to reflect...

If you're worried about being blamed when things go wrong...

...then consider that taking accountability also means you're likely to get the credit when things go right. Accountability involves taking the rough with the smooth.

If you let things slide rather than challenging others to deliver...

...then remember that success often depends on each person in the team contributing. If someone isn't getting the job done, they will need to improve or accept the consequences. Otherwise, the whole team may suffer.

If you take accountability yourself, but don't instill it in others...

...then find out how to make the work matter for your team. What will success bring? What are the consequences of missing targets? Show them why excellence is essential.



Learn more about *Ensures* accountability

Burka, J. B., & Yuen, L. M. (2008). *Procrastination: Why you do it and what to do about it now* [25th Anniversary ed.]. Cambridge, MA: Da Capo Press.

Evans, H. J. (2008). *Winning with accountability: The secret language of high-performing organizations*. Dallas, TX: CornerStone Leadership Institute.

Grimshaw, J., & Baron, G. (2010). *Leadership without excuses: How to create accountability and high performance (instead of just talking about it)*. New York, NY: McGraw-Hill.

Pychyl, T. A. (2013). *Solving the procrastination puzzle: A concise guide to strategies for change*. New York, NY: Penguin Group.

Samov, P. (2010). *Present perfect: A mindfulness approach to letting go of perfectionism and the need for control*. Oakland, CA: New Harbinger Publications, Inc.



Deep dive learning resource links

Ashkenas, R. (2012, July 9). Seven mistakes leaders make in setting goals. *Forbes*. Retrieved from <http://www.forbes.com/sites/ronashkenas/2012/07/09/seven-mistakes-leaders-make-in-setting-goals/>

Chua, C. (2010, June 3). *11 Practical ways to stop procrastinating*. Lifehack. Retrieved from <http://www.lifehack.org/articles/lifehack/11-practical-ways-to-stop-procrastination.html>

Doheny, K. (2008). *Strategies to reduce perfectionism*. Psych Central. Retrieved from <http://psychcentral.com/lib/strategies-to-reduce-perfectionism/0001526>

- Fox, J. (2013, December 13). You can get some big things done when it's not all about you. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/12/you-can-get-some-big-things-done-when-its-not-all-about-you/>
- Klobucher, T. (2011, October 24). The danger of complacency in the workplace. The Great Workplace Revolution [YouTube]. Retrieved from <http://www.youtube.com/watch?v=kez4J7I-Swg>
- Llopis, G. (2013, July 8). 10 Signs your employees are growing complacent in their careers. *Forbes*. Retrieved from <http://www.forbes.com/sites/glennllopis/2013/07/08/10-signs-your-employees-are-growing-complacent-in-their-careers/>
- Mind Tools. (n.d.). *Helping people take responsibility*. Mind Tools. Retrieved from <http://www.mindtools.com/pages/article/taking-responsibility.htm>
- The Muse. (2012, September 20). The right way to ask for help at work. *Forbes*. Retrieved from <http://www.forbes.com/sites/dailymuse/2012/09/20/the-right-way-to-ask-for-help-at-work/>
- Vanderkam, L. (2012, June 12). What the most successful people do before breakfast. *Fast Company*. Retrieved from <http://www.fastcompany.com/1839987/what-most-successful-people-do-breakfast>
- White, S. (2011, October 13). Overcoming work mistakes: Learn how to speak up and move on. *The Huffington Post Canada*. Retrieved from http://www.huffingtonpost.ca/2011/10/12/overcoming-work-mistakes_n_1007275.html
- Wilson, H. J. (2012, April 2). Employees, measure yourselves. *The Wall Street Journal*. Retrieved from <http://online.wsj.com/news/articles/SB10001424052970204520204577249691204802060>
- Zenger, J., & Folkman, J. (2014, January 15). Your employees want the negative feedback you have to give. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2014/01/your-employees-want-the-negative-feedback-you-hate-to-give/>

Recommended search terms

If you'd like to explore *Ensures* accountability further, try searching online using the following terms:

- Avoiding procrastination.
- Keeping others accountable.
- Monitoring your progress at work.
- Owning up to your mistakes.
- Reducing perfectionism.
- Stopping complacency in the workplace.

Manages Ambiguity

Operating effectively, even when things are not certain or the way forward is not clear.

Whether at work or off work, people constantly face situations that are ambiguous or uncertain—where it's not clear what the problem is or what the solution is. Where the unknown outweighs the known by a wide margin. Some studies estimate that 90% of what managers deal with is at least somewhat ambiguous. New demands, new technology, new marching orders, new processes. Nothing lasts very long. In an era when clarity is scarce and certainty is fleeting, relying on solutions that have worked in the past may seem safe, but it's actually risky. New times require new solutions. Solving problems and getting things done in this volatile context means being willing to forge ahead when the path is foggy, at best. It means adjusting your approach—to both problems and people—to match changing conditions. To surrender the need to be sure. The world is getting less and less predictable. By having a mindset geared to viewing uncertainty as the new normal, you'll be better prepared when the next unknown appears. And better prepared to view that unknown as an opportunity to capitalize on.

“Take advantage of the ambiguity in the world. Look at something and think what else it might be.”

Roger von Oech – American speaker, conference organizer and author

Skilled

Deals comfortably with the uncertainty of change.

Effectively handles risk.

Can decide and act without the total picture.

Is calm and productive, even when things are up in the air.

Deals constructively with problems that do not have clear solutions or outcomes.

Less skilled

Struggles to make progress when facing ambiguous or uncertain situations.

Delays moving forward until all the details are known.

Appears stressed when things are uncertain.

Operates best when things are structured and predictable.

Talented

Is energized when faced with ambiguity and uncertainty.

Makes significant progress and remains calm and composed, even when things are uncertain.

Manages the risk that comes with moving forward when the outcome isn't certain.

Adapts quickly to changing conditions.

Overused skill

May move to conclusions or action without enough data.

May err toward the new and risky at the expense of proven solutions.

Doesn't honor others' need for some level of clarity before acting.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Manages* ambiguity. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

Prefers maintaining control.

Easily overwhelmed.

Cautious; avoids risk.

Likes things to be predictable.

Dislikes change.

Negative bias; focuses on the downsides.

Freezes without a clear plan.

High need to be right.

Too inflexible.

Perfection oriented.



Brain booster

Your brain likes certainty. It is designed to predict and anticipate what will happen next. You look for patterns or scripts that make it easy to see what comes next. When patterns play out the way you expect, your brain experiences a reward. When patterns do not play out the way you expect, your brain experiences a threat. Ambiguity is distressing because it means we cannot rely on patterns, we can't predict what will happen next. This gives us a sense of a lack of control or autonomy. When uncertainty is beyond our control, we experience high levels of stress. When uncertainty is within our control (we need to make a decision about something), the stress feels more manageable. To manage ambiguity and uncertainty, take stock of what control you have in the situation. What choices can you make. What routes might you take, given different possible outcomes. The more you can feel like an agent in the situation, the lower your stress levels will be.³

Tips to develop *Manages* ambiguity

1. **Holding too tightly to the past? Just let go.** Dealing comfortably with uncertainty and ambiguity means letting go of sureness. Like letting go of one trapeze in the air to catch the next one. For a small amount of time, you have nothing to hold on to. If you cling to the first trapeze, afraid you will fall, you'll always return to the same old platform—safe but not new or different. Staying put means it's more likely your safe platform will keep getting smaller and smaller until it disappears completely. Taking that leap gets you to a new

platform and a new place. Manage the uncertainty around you by being proactive. Keep informed about business/technological advances. Keep alert to trends and what entrepreneurs are inventing in their garages. Visualize different pathways and different outcomes. Talk about it. Invite ideas. The more you do this, the more comfortable you'll feel because you'll be part of the next wave.

- 2. Don't know where to begin? Experiment with small steps.** Imagine all the lights suddenly go out. Or you wake up in the middle of the night in a strange location. What do you do? You feel your way around until your eyes adjust. You reach for a light. Embarking on a new venture or acting on an ambiguous problem with no precedents to follow is similar. Work to make the unknown known. Break a large issue into manageable pieces. Take small steps and see what happens. Get instant feedback, correct the course, then move forward a little more. Don't try to get it all right the first time. The more uncertain the situation is, the more likely mistakes will be made. Expect it—bumping into things while looking for the light is common. Think of mistakes as valuable feedback steering you in the right direction. Make it safe to talk about them. Build curiosity while undertaking risk—this will decrease stress and increase creativity. Experiment, prototype, conduct soft launches. Engage stakeholders to make sense of what emerges and evolves. If criticism follows flawed results, accept it while pointing out how you'll apply what's been learned in the next iteration.
- 3. Think you need to have all the answers? Convey your overall intention.** Many feel shaky without a concrete plan. It's understandable—how can you lead when you're not sure where you're going? How can you assess progress without clear targets to measure against? Moving through transitions or into any new turf, people want to know where they stand. What to do when they go to work each day. More importantly, why those things matter. So speak honestly about what's going on. Explain what you know and don't know. If you don't have a game plan with firm time lines, share the overall intention instead—what you're aiming toward and how that supports the mission. Change expert Peggy Holman asserts that intentions are “powerful shapers of action.” They energize and align self-directed people in complex situations. They fuel a sense of purpose. So co-create your intentions with invested colleagues, communicate with them often, and watch what emerges. Make sense of patterns and reinforce what's working, adjusting along the way. Expressed with confidence, intentions convey certainty in the midst of uncertainty.

Want to learn more? Take a deep dive...

Doheny, K. (2008). *Strategies to reduce perfectionism*. Psych Central.

Schwartz, T. (2012, May 1). Turning 60: The twelve most important lessons I've learned so far. *Harvard Business Review Blog Network*.

Thomke, S. (2011, June 6). *How business experimentation fuels innovation*. Chief Executive.net.

- 4. Losing your cool? Manage uncertainty-driven stress.** It's not uncommon to get stressed when dealing with increased ambiguity. We lose our anchor. Stress increases the chances that you'll respond to conditions and people more emotionally. Maybe you lash out. Close down. Berate yourself. Go into panic mode. However you react, remember that your reactions probably don't just affect you. So take charge of it. Get familiar with what triggers your reactions. Is it when you don't know what to do, don't want to make a mistake, are afraid of the consequences, lack the confidence to act? Pause. Observe your patterns and label your emotions—this will provide some perspective and reduce escalation. Do some research, then try different ways to regain your equilibrium until you find what works best for you. There are lots of resources available online, from breathing and mindfulness exercises to tips on tackling underlying issues. When a

situation seems overwhelming, drop the problem for a while. Go do something else. Return to it after you've had time to decompress and reflect. Practice responding more consistently in ways that will best serve you and your colleagues.

5. **Tentative about entering the unknown? Shift gears and welcome it.** Are you the type that dips a toe in the water before diving in? Tries your best to avoid all surprises? Makes a habit of never changing a habit? There's nothing wrong with being cautious—to an extent. But taken to an extreme, that tendency could keep you stuck in a bygone era. Wake up to now. Learn to dive in and see what happens. Start with the easy stuff: order new things from the menu, take a new route to work, go on a mini-vacation without an itinerary. Try things that seem fun and a little scary. Like taking a class in improvisation where you'll be forced to wing it and work with what shows up. Spend time with people who are energized by adventure. Find out how they approach risk and forge new ground, then try it out for yourself. Remind yourself that the unknown isn't the enemy, fear is. So ask, "What's the worst thing that could happen?" Play out the scenario and notice how resourceful you can be when put to the test. Still feel queasy? Jump in anyway. It may be uncomfortable at first but be rewarding in the long run.
6. **Daunted by an ambiguous challenge? Gain some perspective.** Start by defining the challenge—what it is and what it isn't. Visualize it as if you're seeing it from above. From the bird's eye view, what are the various components? How do they relate? Use mapping techniques or concept mapping software to cluster what's connected and explore links with the larger ecosystem. Then look below the surface of the challenge. What underlying issues are causing problems? Keep drilling down, asking why something is happening, until you get to the root causes. For a different take on what's at play, generate discussion using one or more useful frameworks. For example, examine organizational issues using McKinsey's 7S model: strategy, structure, systems, shared values, skills, style, and staff. Or explore challenges using 9 building blocks identified in *Business Model Generation*. (For more information, visit www.businessmodelgeneration.com.) Whatever framework you use, look for patterns and interconnections to gain perspective and inform solutions.
7. **Negativity taking over? Counter closed-door thinking.** When there are a lot of unknowns, people sometimes fill in the blanks with doom and gloom forecasts. This can block the ability to be optimistic—to see advantages of change. Through years of research, psychologist Martin Seligman has found that optimism can be developed in specific ways. (For more information, visit www.ppc.sas.upenn.edu.) Identify what *can* be done in the midst of uncertainty. At minimum, a shift in attitude is always possible. Research shows there are more optimists in senior levels of leadership. It's unclear whether they're promoted partly because they're optimistic or if they become that way once they've arrived. What is clear is that optimism is influential. Although tied to one's natural disposition, it can be developed through consistent effort.

Want to learn more? Take a deep dive...

Laufenberg, D. (2010, December). Diana Laufenberg: How to learn? From mistakes [Video file]. TED.

Sidhu, I. (2011, January 24). Overcoming ambiguity: Three steps that every business can take. *Forbes*.

Wilkinson, A., & Kupers, R. (2013, May). Living in the futures. *Harvard Business Review*.

8. **Want to be 100% sure? Balance thinking with action.** Lots of us want all the data in and all our ducks in a row before we act. Perfectionism is tough to let go of, especially when past success can be traced back to getting it right with zero defects. Recognize your perfectionism for what it might be—collecting more information to improve your confidence in making a fault-free decision, thereby avoiding risk and criticism.

Try to decrease your need for complete information and your need to be right all the time. Decrease it slightly every week until you reach a more reasonable balance between thinking it through and taking action. Try making some small decisions on little or no data. Anyone with 100% of the data can make good decisions. The real test in the marketplace is who can act the soonest with a reasonable amount—but not all—of the data.

9. Prefer to check things off your list? Redefine what progress means. Do you have a high need to complete tasks? Wrap things up in nice neat packages? Working well with ambiguity often means moving from incomplete task to incomplete task. Some projects may be put on hold, some may never be finished. You'll constantly have to edit your actions and decisions. It's the way things typically go with emerging realities or new initiatives. When going through transitions, it's common to put temporary structures in place—temporary teams, org chart, systems. After one thing ends and before something new begins, scaffolding gets erected, torn down, then replaced. Life in flux means it's time to change your internal reward system. Instead of just feeling good when you finish a project, it's about moving things forward incrementally. Think progress over perfection. Recognize it. People always need appreciation for a job well done—so do you.

10. Need inspiration? Learn from others who thrived during uncertainty. There are examples throughout history of people who have done well when the environment around them was highly ambiguous. People like Steve Jobs, Nelson Mandela, Winston Churchill, or Aung San Suu Kyi. There are those who were energized by quests into the unknown—Lewis and Clark, Leonardo da Vinci, Jane Goodall. Learn about them through biography.com or other sources. Then take your search closer to home. Interview trailblazers in your own company or industry—people who took risks and paved new terrain. Find out how they dealt with similar concerns you have. Did they think the journey was worth it? If your team or organization is facing ambiguity (market shifts, new regulations, geo-political crisis, you name it), find case studies of other companies that have addressed similar challenges.

Want to learn more? Take a deep dive...

Biography.com

Bregman, P. (2012, January 4). Your problem isn't motivation. *Harvard Business Review Blog Network*.

The Staff of the Corporate Executive Board. (2011, December 20). Preventing 'Analysis Paralysis.' *Bloomberg Businessweek*.

Job Assignments Specific to Your Role

- Start something from scratch for your organization or customers (e.g., a new position, service, location). Manage the unknowns that accompany all start-ups.
- Manage a group through a tough crisis with no easy answers. The tension may escalate, giving you a chance to practice keeping your emotions in check.
- Increase the scope or complexity of what you are currently doing, which will take you out of your comfort zone while needing to make decisions and effectively contribute.

Additional Job Assignments

- Lead an organizational transition such as an acquisition or merger, handling ambiguous factors involving structure, systems, people, or processes.
- Be part of an initiative around entering a new or emerging market, with accountability for results despite no clear path to follow.

Take time to reflect...

If you feel more anxious than energized when things are uncertain...

...then try to identify the source of your anxiety. If you understand what you're specifically concerned about, it will be easier for you to overcome your worries.

If you tend to move slowly for fear of making mistakes...

...then consider whether it's necessary caution or needless worry that's holding you back. Be prudent, but be persistent. Errors are inevitable. If you stumble and stray, view these as learning opportunities.

If you feel overwhelmed when things are not crystal clear...

...then recognize that ambiguity is inevitable. Things change. Accept ambiguity as the new normal. Embracing it will help you become comfortable with it.



Learn more about *Manages ambiguity*

Hodgson, P., & White, R. (2001). *Relax, it's only uncertainty: Lead the way when the way is changing*. London, England: Pearson Education Limited.

Johri, V. (2010, March 9). Leaders today have to be comfortable with ambiguity. *Business Standard*.

Keough, D. R. (2008). *The ten commandments for business failure*. New York, NY: Penguin Group.

Osterwalder, A., & Pigneur, Y. (2010). *Business model generation: A handbook for visionaries, game changers, and challengers*. Hoboken, NJ: John Wiley & Sons.

Schlesinger, L. A., Kiefer, C. F., & Brown, P. B. (2012). *Just start: Take action, embrace uncertainty, create the future*. Boston, MA: Harvard Business School Publishing.

Seligman, M. E. P. (2006) *Learned optimism: How to change your mind and your life*. London, England: Vintage.

Wilkinson, D. J. (2006). *The ambiguity advantage: What great leaders are great at*. Hampshire, England: Palgrave MacMillan.



Deep dive learning resource links

Biography.com

Bregman, P. (2012, January 4). Your problem isn't motivation. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/01/your-problem-isnt-motivation/>

Doheny, K. (2008). *Strategies to reduce perfectionism*. Psych Central. Retrieved from <http://psychcentral.com/lib/strategies-to-reduce-perfectionism/0001526>

Laufenberg, D. (2010, December). Diana Laufenberg: How to learn? From mistakes [Video file]. TED. Retrieved from http://www.ted.com/talks/diana_laufenberg_3_ways_to_teach.html

Schwartz, T. (2012, May 1). Turning 60: The twelve most important lessons I've learned so far. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/05/turning-60-the-twelve-most/>

Sidhu, I. (2011, January 24). Overcoming ambiguity: Three steps that every business can take. *Forbes*. Retrieved from <http://www.forbes.com/sites/indersidhu/2011/01/24/133/>

The Staff of the Corporate Executive Board. (2011, December 20). Preventing 'Analysis Paralysis.' *Bloomberg Businessweek*. Retrieved from <http://www.businessweek.com/management/preventing-analysis-paralysis-12202011.html>

Thomke, S. (2011, June 6). *How business experimentation fuels innovation*. Chief Executive.net. Retrieved from <http://chiefexecutive.net/how-business-experimentation-fuels-innovation>

Wilkinson, A., & Kupers, R. (2013, May). Living in the futures. *Harvard Business Review*. Retrieved from <http://hbr.org/2013/05/living-in-the-futures/ar/1>

Recommended search terms

If you'd like to explore *Manages ambiguity* further, try searching online using the following terms:

Dealing with ambiguity/ambiguity tolerance.

Managing uncertainty.

Preventing analysis paralysis.

Reducing perfectionism.

Succeeding through failure.

Business Insight

Applying knowledge of business and the marketplace to advance the organization's goals.

You gotta know the territory! Nothing beats knowing what's going on, and it can be essential to developing credibility. This means people developing insight through two routes. First, they pay attention to their own industry. Build expertise in their functional discipline. Understand how the departments and drivers of their organization relate to and work with each other. Understand the agenda, issues, and concerns of the people they work with inside their organization. See things as others do. Walk a mile in their shoes. Second, they look outside. Learn about their competition and customers. Identify trends. Spot potential opportunities and threats that could come their way. When you know what's going on, you can maximize your contribution. Be better able to put forward ideas and suggestions that pass the business practicality test. Make it your business to learn about the business.

"Business, more than any other occupation, is a continual dealing with the future; it is a continual calculation, an instinctive exercise in foresight."

Henry R. Luce – American media mogul

Skilled

- Knows how businesses work and how organizations make money.**
- Keeps up with current and possible future policies, practices, and trends in the organization, with the competition, and in the marketplace.**
- Uses knowledge of business drivers and how strategies and tactics play out in the market to guide actions.**

Less skilled

- Doesn't understand how businesses work.
- Is not up-to-date on current and future policies, trends, and information affecting the organization.
- Is unaware of how strategies and tactics work in the marketplace.
- Doesn't take business drivers into account when planning and executing own work.

Talented

- Has an in-depth understanding of how businesses work and make money.
- Is the first to spot possible future policies, practices, and trends in the organization, with the competition, and in the marketplace.
- Consistently applies a business driver and marketplace focus when prioritizing actions.

Overused skill

- Overdevelops or depends upon industry and business knowledge and skills at the expense of personal, interpersonal, managerial, and leadership skills.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Business insight. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Inexperienced; new to the organization.
- Lacks interest in general business.
- Lacks interest in financial matters.
- Narrow perspective.
- No exposure outside the function.
- Overly dedicated to a profession, not the organization.
- Very tactical and here-and-now oriented.
- Focuses only on own agenda.



Did you know?

Research carried out by the Perth Leadership Institute in 2008 found there to be no correlation between high levels of intelligence (measured by IQ) and business acumen. It also revealed that having a business education is unrelated to level of business acumen. Or, in some cases, can lead to worse-than-average performance if a person overestimates their business know-how. It turns out that developing true business insight is mostly about absorbing and understanding what's around you—your industry, your organization, your customers, your competitors.⁶

Tips to develop Business insight

1. **Need to be better informed? Read more.** As well as business books, pick up publications such as *Fast Company*, *Harvard Business Review*, *The Wall Street Journal*, *Bloomberg Businessweek*, *Forbes*, *Fortune*, or *Inc.* magazine. Pay attention to business social media and blogs. Read across a range of topics: marketing, finance, customer service. Focus on content that will educate you about your industry and the business environment as a whole. Look for information on new and emergent thinking. Interpret what you read into information that is relevant for you. Make notes on why and how it may be useful. Subscribe to Soundview Executive Book Summaries. They summarize in a few pages all the major business books that are on the best-seller lists.
2. **Not up to speed? Watch the right sources.** Watch the news and business channels. They often have interviews with business leaders and reviews by industry experts, as well as general reviews of companies. Watch online business presentations and TED Talks. Begin to watch one or two programs a week until you can zero in on what you specifically need to know.
3. **Baffled by buzzwords? Learn the lingo.** Listen for and learn the meaning of common business terms, acronyms, and abbreviations. Like the accounting term EBITDA, which is actually an acronym but most business people say it as a noun. Ask for more information when you hear something you are not familiar

with. Figure out the settings where the use of jargon is helpful or where straight talk will get the message across better. For your message to be engaging and have impact, it needs to be understood.

Want to learn more? Take a deep dive...

Perrine, J. (2011, April 23). *Developing your business acumen: You must read to succeed*. All Things Admin.

Zeizima, K. (2010, January 6). A program helps sharpen the business acumen of those on the rise. *The New York Times*.

4. **Need access to expertise? Join a professional industry network or association.** Join the professional networks or associations for your industry. Join one of their special interest groups to get a close-in look. Sign up for newsletters and publications. Attend conferences and seminars. Connect with the people you meet. Share ideas. Join business-related communities using social media. Not only will you benefit from hearing the latest information and thinking in your sector, you will develop your professional network.
5. **Ready to continue your education? Take a class.** Formal education classes provide a supportive and structured approach to learning about business. They offer the opportunity to come together with a group of like-minded people learning together. Research the business courses that are offered online and by your local college or university. You'll find that you don't have to take on a full-time degree or MBA program to further your business education. There will be ways for you to take it one lesson at a time.
6. **Want to learn from the pros? Surround yourself with wise counsel.** Find a business mentor. Look inside and outside your organization. Consult someone whose business skills you admire and want to emulate. A long-tenured individual who has navigated events such as recessions, booms, unemployment, mergers, acquisitions, product or service shifts, and reorganizations. Someone who will take an interest in your career and help you think. Spend time with them. Ask them to share experiences and give you advice on the best way to learn about different areas of expertise. Do more listening than talking. Take your ideas and problems to them for discussion and guidance. Write down what you learn, when you learned it, and from whom. Test what you learn and use your mentor conversations to review your successes and failures. Read up on some of the benchmark names in business, for example: Muhammad Yunus (Grameen Bank), Indra Nooyi (PepsiCo), Katsuaki Watanabe (Toyota), Steve Jobs (Apple), Richard Branson (Virgin), Sheryl Sandberg (Facebook).

Want to learn more? Take a deep dive...

Broder, L. (2013, September 18). *Networking tips for novices*. Fox Business.

Chowdhury, R. (2011, May 26). *The importance of networking*. Business Insider.

Hannon, K. (2011, October 31). How to find a mentor. *Forbes*.

7. **Stuck in tactical mode? Engage with the strategy.** Successful organizations have well-thought-out strategies. They know where they are, where they are heading, and how they are going to get there. They understand their competition. They know where they have competitive advantage. For a strategy to be successful, individuals need to understand it at a local level. Actions and decisions need to be aligned to it. Ask for lunch or just a meeting with the person who is in charge of the strategic planning process in your

company. Have them explain the strategic plan for the organization. Particularly, have them point out the mission-critical functions and capabilities the organization needs to be on the leading edge of to win.

8. **Superficial understanding of your business? Think like an executive.** Read what you can about the organization as a whole. Study your annual report and other important communications, including financial reports. Learn about the structure, systems, functions, and processes. How do the moving parts work together? What is your value proposition? What are your key performance indicators? How do you go to market? What makes you different? Who are your competitors? Build up your understanding enough to be able to articulate clearly how your business operates, how it makes money, and how you contribute to that.
9. **Narrow insight? Broaden your perspective.** Analyze the business from multiple sources. The big three angles are finance, marketing, and customer service. There is a tendency to favor one source of information over others. This is natural and consistent with education, training, and experience, but to truly understand the business, all three of these broad perspectives need to be taken into consideration. Don't understand the financials? Talk to someone who does. Read and understand the implications of balance sheets, income statements. Learn about return on investment (ROI) and what it looks like for your organization. Is marketing a mystery? Find out how your organization goes to market. What's the value proposition? What makes the organization stand out against the competition? Unclear on customer service? Identify your key customer groups. Look internally and externally. Find out how products and services are sold and delivered to them. Understand what they want and need from you.

Want to learn more? Take a deep dive...

Cope, K. (2012, February 29). *How to see the big picture, without losing sight of the details*. Chief Executive.net.

Kurtz, R. (2008, September 5). Analyzing your company's strengths and weaknesses. *Bloomberg Businessweek*.

10. **Want fresh insights? Get close to your customers.** Studies show that there is significant correlation between indicators of financial health—such as increased sales, growth margins, and shareholder return—and how customers rate service. Meet with a counterpart in customer service. Have them explain the function to you. Listen in to customer service calls or, even better, handle a couple yourself. Look for ways to gather feedback from some customers and strengthen the organization's relationship with them. What do customers expect from your products or services? What is the biggest customer complaint? What delights them? Track their changing needs and expectations. Include the customer perspective in your decision-making process.
11. **Want to stay ahead in the game? Become a student of the competition.** Part of knowing your business is knowing how you stack up against other players in the marketplace. Use the same online sources that you use to gain intel on your own business and the customer's business to learn about your competitors. Analyze their websites. Read up on customer reviews of their products or services. Start a spreadsheet with columns listing their key features and how they stack up to yours. If it's a brick and mortar business or otherwise open to the public, go into stealth mode. Blind shop to get a sense of their price points, customer service, and operational norms. See who is attending the same trade association events as you. Grab brochures from their booth. When possible, audit sponsored workshops or receptions. See how they position their business with customers.

Want to learn more? Take a deep dive...

Handley, A. (2013, August 7). Build a better understanding of customers, get a competitive advantage. *Entrepreneur*.

Schoemaker, P. J. (2013). 5 Ways to know what your customers want before they do. *Inc.*

Zaltman, G. (2008, June 29). Understanding your customers' minds [Video file]. *Harvard Business Publishing*.

- 12. Feeling pigeonholed? Go on a company tour.** Knowledge is embedded (and oftentimes hidden) in the social fabric of your organization. Branch out from your day-to-day activities to get to that knowledge. Volunteer for cross-functional assignments, committees, projects, or task forces that include people outside your function and topics outside your area of expertise. Work in an office setting? Visit the shop floor and talk to frontline workers. Not in a customer-facing role? Do a ride-along on a sales call to a client. Different employees and different customers will offer different perspectives on your business. Talk to one new person a week. Ask them about what they do. Learn from them. Your coworkers and customers are the biggest free training and development resource you have.
- 13. Think only about your part of the business? Consider the integration points.** In order to be a well-running business, all of the pieces and parts need to work together. A business is a closed system. Success is dependent on the coordinated efforts of everyone. What happens in one area always affects everything else. Identify your key stakeholders. Recognize their priorities and the implications of your actions on them. Clearly communicate the rationale behind decisions you make. Let others know the part they play. Explain their roles and responsibilities. The rewards of success and risks of failure. Demonstrate how the impact of your decision contributes to the achievement of company objectives.
- 14. Struggle to recommend ways forward? Deconstruct your thinking.** Questions can help you think things through. Help shape and test ideas. Break complex problems down into smaller, more manageable chunks. Ask yourself: What's happening now in the organization? Positive or negative? What's causing it? Is it resulting from external forces (i.e., market conditions, consumer preference/choice) or internal influences (i.e., management style, product or service emphasis)? What other forces are at play? Is it an issue? What are the consequences (positive and negative) of doing nothing? What outcome does the organization need? What's my challenge? What actions can I take to resolve problems or issues? What do I have control and influence over? Who else needs to be consulted? What is the logical next step? While you may not always come up with the perfect recommendations, working through your thinking is a great way to gain insight into how the business works.

Want to learn more? Take a deep dive...

Capozzi, C. (n.d.). How to become more business-minded. *Chron.*

Hill, B. (n.d.). What is a strong general business acumen? *Chron.*

Kelly-Detwiler, P. (2013, September 30). How Walmart and G.E. are leading a transformation in the energy market. *Forbes.*

Job Assignments Specific to Your Role

- Participate in the budget setting and monitoring process. Use this as an opportunity to dig beneath the surface of the organization and broaden your understanding of how the business operates.
- Work short rotations in other areas of operation you've not been exposed to before. Select areas you know least about.
- Do a satisfaction survey in person or by phone for various audiences (members, parents, schools, donors, staff, etc) and present the results to key stakeholders. Use the feedback to help you understand what the organization is doing right and what needs to change. Make recommendations for improvement.

Additional Job Assignments

- Offer to take new starters on a company tour. Introducing them to different parts of the business can be a great way to hone your own knowledge of how the business operates.
- Do a competitive analysis of your organization's products or services or position in the marketplace, and present it to the people involved. What can you learn from other organizations? What does the analysis teach you about business as a whole?

Take time to reflect...

If you think understanding the business doesn't apply to you...

...then remember that being part of the organization involves understanding how it works. Break down the complexities. Demystify the concepts. Develop a comprehensive picture of how the business operates.

If you make your decisions without considering the business context...

...then take a step back to think through the business implications of your choices. Even logical decisions can sometimes be at odds with strategy. Think holistically. Think context. Think organizational goals.

If you're too busy to learn about the industry and market...

...then understand the importance of developing greater insight. Taking time to look more broadly will open your eyes. It will help you anticipate what's coming your way.



Learn more about Business insight

Berman, K., Case, J., & Knight, J. (2006). *Financial intelligence: A manager's guide to knowing what the numbers really mean.* Boston, MA: Harvard Business School Publishing.

- Buffet, W., & Cunningham, L. (2013). *The essays of Warren Buffett: Lessons for corporate America* (3rd ed.). Durham, NC: Carolina Academic Press.
- Cope, K. (2012). *Seeing the big picture: Business acumen to build your credibility, career, and company*. Austin, TX: Greenleaf Book Group.
- Ensher, E. A., & Murphy, S. E. (2005). *Power mentoring: How successful mentors and protégés get the most out of their relationships*. New York, NY: John Wiley & Sons.
- Kahneman, D. (2011). *Thinking, fast and slow*. New York, NY: MacMillan.



Deep dive learning resource links

- Broder, L. (2013, September 18). *Networking tips for novices*. Fox Business. Retrieved from <http://www.foxbusiness.com/personal-finance/2013/09/18/networking-tips-for-novices/>
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- Chowdhury, R. (2011, May 26). *The importance of networking*. Business Insider. Retrieved from <http://www.businessinsider.com/the-importance-of-networking-2011-5>
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- Handley, A. (2013, August 7). Build a better understanding of customers, get a competitive advantage. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/article/227100>
- Hannon, K. (2011, October 31). How to find a mentor. *Forbes*. Retrieved from <http://www.forbes.com/sites/kerryhannon/2011/10/31/how-to-find-a-mentor/>
- Hill, B. (n.d.). What is a strong general business acumen? *Chron*. Retrieved from <http://smallbusiness.chron.com/strong-general-business-acumen-21849.html>
- Kelly-Detwiler, P. (2013, September 30). How Walmart and G.E. are leading a transformation in the energy market. *Forbes*. Retrieved from <http://www.forbes.com/sites/peterdetwiler/2013/09/30/walmart-ge-and-lighting-a-case-study-in-market-transformation/>
- Kurtz, R. (2008, September 5). Analyzing your company's strengths and weaknesses. *Bloomberg Businessweek*. Retrieved from http://www.businessweek.com/smallbiz/tips/archives/2008/09/analyzing_your_companys_strengths_and_weaknesses.html
- Perrine, J. (2011, April 23). *Developing your business acumen: You must read to succeed*. All Things Admin. Retrieved from <http://allthingsadmin.com/administrative-professionals/developing-business-acumen-read/>
- Schoemaker, P. J. (2013). 5 Ways to know what your customers want before they do. *Inc*. Retrieved from <http://www.inc.com/paul-schoemaker/5-ways-to-know-what-your-customer-wants.html>
- Zaltman, G. (2008, June 29). Understanding your customers' minds [Video file]. *Harvard Business Publishing*. Retrieved from <http://hbr.org/video/2226586964001/understanding-your-customers-minds>
- Zezima, K. (2010, January 6). A program helps sharpen the business acumen of those on the rise. *The New York Times*. Retrieved from http://www.nytimes.com/2010/01/07/business/smallbusiness/07sbiz.html?_r=0

Recommended search terms

If you'd like to explore Business insight further, try searching online using the following terms:

- Business savvy.
- Business strategy alignment.
- Corporate finance and strategy.
- Developing business acumen.
- Importance of mentoring.

Collaborates

Building partnerships and working collaboratively with others to meet shared objectives.

Inside and outside of work today, it's hard to find examples where anything of value gets done without collaboration. Collaboration is the art of bringing people together to leverage their skills, talents, and knowledge to achieve a common purpose. Collaborating creates synergy—resulting in a combined effort with greater results than those achieved by individuals. It breaks down barriers. Increases mutual respect and recognition. Helps overcome issues of poor communication, lack of cooperation, suspicion, and a myriad of dysfunctional behaviors. Collaborative relationships must be managed so the friction is removed and the power of those relationships can be realized. Good collaboration is all about reciprocity. Mutual openness and idea sharing. Mutual accountability and commitment. The most effective collaborators know when it's the right time to bring people together. What has to be achieved and why? Who has what's needed to reach the goal? How should people be brought together? Collaboration leads to more efficient use of time and resources and the easy exchange of ideas and talent. Things get done quicker. Ideas are built upon. There is less duplication of effort. People are more likely to be committed rather than just compliant.

“No member of a crew is praised for the rugged individuality of his rowing.”

Ralph Waldo Emerson – American essayist, lecturer, and poet

Skilled

Works cooperatively with others across the organization to achieve shared objectives.

Represents own interests while being fair to others and their areas.

Partners with others to get work done.

Credits others for their contributions and accomplishments.

Gains trust and support of others.

Less skilled

- Overlooks opportunities to work collaboratively with others.
- Values own interests above others'.
- Shuts down lines of communication across groups.
- Prefers to work alone and be accountable for individual contributions.

Talented

- Models collaboration across the organization.
- Facilitates an open dialogue with a wide variety of contributors and stakeholders.
- Balances own interests with others'.

- Promotes high visibility of shared contributions to goals.

Overused skill

- Is overly consensus-driven and struggles to make decisions in a timely manner.
- Risks being perceived as lacking courage and failing to stand up for own beliefs.
- May be too accommodating.
- May prioritize collaboration at the expense of making tough decisions.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Collaborates. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Overly formal in relationships.
- Competitive with peers.
- Doesn't respect other groups.
- Impersonal style.
- Isn't a team player.
- Isn't forthcoming with information.
- Poor collegial skills.
- Doesn't communicate well.
- Poor time management.
- Possessive.



Brain booster

For better or worse, our brains are set to a default position when it comes to people we don't know. Strangers are foes until proven otherwise. At the heart of collaboration lies relationship. Relying on others. Sharing ideas and being vulnerable. Sharing resources. These all go more smoothly when your brain sees your collaborators as friends, not foes. Fortunately, the brain is wired to read social cues and pick up on people's intent behind their actions. Our brains have neurons that mirror in our minds the actions we see others taking. That is how we are so good at determining positive or negative intent—in our minds we are mirroring the action we're observing. When the brain interprets positive intent, it adds more points to the "friend" column. And once our brains categorize someone as a friend (or not a threat), our bodies release oxytocin, a chemical that denotes and promotes a feeling of trust, safety, and connectivity. Show positive intent. Give time for teams and partnerships to build trust. Facilitate more opportunities for positive social cues to be exchanged between strangers. These efforts will pay off when it comes time to collaborate.⁷

Tips to develop Collaborates

1. **Have a decision to make? Think collaboration.** People are more likely to be motivated to support a decision that they have helped make. When a decision is required, first think about whether it can be made in a collaborative manner. That's not always the case. The need for speed may override involvement. But, in most cases, inclusive decision-making drives more effective solutions. Deeper analysis. More creative ideas. Buy-in from those involved. Who needs to be involved? Who has a stake in the decision? Who needs

to buy in? Consult with others and share information. Ask people what they want to know. Make sure you give them a sense of the big picture and relevant information. Invite input and feedback. Then, listen. What do they think is the core issue? What ideas do they have? Brainstorm to work out a decision that has the greatest benefit.

- 2. Not clear on where others are coming from? Work to make connections.** Collaboration is not just creating dialogue. It is about making connections with others. Research suggests that the best collaborators are connectors. They connect ideas outside of the organization with internal challenges. They help build bridges throughout the organization. Ultimately, they link people, ideas, and resources that would not normally connect with one another. The key is to connect. Build trust. Build relationships. Connect your priorities to those of others. In each situation where you are working with other people, it is important to think about their perspective. Where are your viewpoints similar? Where are they different? Relate your goals to theirs. Are there interdependencies? What initiatives or projects do you have in common? How do your values align? Bring similarities to the forefront. Look for ways that you can bring external ideas into the discussion. Link resources. Shine a light on alignment between groups and individuals. Don't think there are connection points? Watch and observe. Ask questions. Get to know others. Chances are the more you listen and become aware, the more likely you are to find ways to connect.
- 3. Need help but don't know how to ask? Clarify your needs.** Others can't read your mind. When you need help from others, the best thing you can do is ask for it. Before talking to the person, think about your key messages. What is it that you really want to accomplish? Do you need extra resources? Ideas? Time? Are there ways for your groups to work together more effectively? Be very specific around your need and what you are requesting from the other person. Ask plainly. Don't beat around the bush. What do they have that you need? What support do you think they can provide? What difference will this make to you? If you don't know, explain your situation and ask for their input. What suggestions do they have? How might they be able to help? If they can't help, whom can they suggest? In turn, think about how you can help them. Collaboration is about give-and-take. Where can you find synergies that benefit the organization and get better results?
- 4. Lack position power? Be an influencer.** Peers generally do not have authority over each other. That means that influence skills, understanding, and trading are the currencies to use in collaboration. Don't just ask for things. Find some common ground where you can provide help. What do the peers you're contacting need? Do you really know how they see the issue? Is it even important to them? How does what you're working on affect them? If it affects them negatively, can you trade something, appeal to the common good, figure out some way to minimize the work (volunteering staff help, for example)? Try to connect your messages to what is important to the other person or their area of the organization. People are more likely to buy into something, even if it doesn't help them, if they can see the broader organizational benefit.
- 5. Overwhelmed by the complexity of the organization? Learn to maneuver.** Wondering how to get things done across the complexity of the organization? Who are the movers and shakers in the organization? How do they get things done? Who do they rely on for expediting things through the maze? Who are the major gatekeepers? Who controls the flow of resources, information, and decisions? Who are the guides and the helpers? Get to know them better. Who are the major resisters and stoppers? Learn to watch people and observe behavior before you need to collaborate. Build relationships with others before you need help. You will have a much better sense of who you are dealing with and who to trust when the time comes to work together. In a virtual world, you may need to use different approaches. Face-to-face is usually best. But you may need to be creative in how to best connect with others outside of your immediate location. Think about

cultural norms, values, and differences before you reach out to others across the organization. Be prepared. Be observant. Know who you are dealing with before you initiate a conversation.

Want to learn more? Take a deep dive...

Anderson, K. (2013, February 2). What makes collaboration actually work in a company? *Forbes*.

Cohen, G. B. (2009, September 29). Leadership: How to ask the right questions. *Bloomberg Businessweek*.

Harvard Management Update. (2008, February 28). Exerting influence without authority. *Harvard Business Review Blog Network*.

Richardson, A. (2011, May 31). Collaboration is a team sport, and you need to warm up. *Harvard Business Review Blog Network*.

- 6. Not sure what others want? Listen.** It's easy to assume you understand someone's position. Do you walk into meetings with preconceived notions of their views? Do you finish people's sentences and not hear what they think? Do you really know what is going on in their heads? The only way to truly understand what's important to them is to ask questions and listen. Use open-ended questions. Questions that cannot be answered with a one-word answer. "Tell me more about..." "How did you...?" "What do you think about...?" Show through your non-verbals that you are paying attention. Nod in response to what they're saying. Maintain good eye contact. Ensure your posture is open (no folded arms). Make notes on key points. Summarize what you are hearing. Paraphrase your understanding of what they say—"So what you're saying is..." Ask clarifying questions if you're unsure. Demonstrate that you care and want to understand. This builds bridges with others. Digest what you're hearing. Does it make sense? Do you have a clear picture of what's important to them? If not, ask for more information.
- 7. Having trouble building trust? Make your intentions clear.** People are less likely to want to work with you when they are not sure of your intentions or actions. When you begin a project, consult with others and provide information. Share your plans for dealing with an issue and invite input and feedback from others. Do something with what you have heard. Link their views to other aspects of the plan. Validate their input through making connections. Communicate freely and encourage others to do the same. If appropriate, conduct a town hall or a Q&A session. Be transparent and candid about decisions and plans. Be clear on your priorities. Paint a clear picture of the goal. What does success look like? Don't just talk about your values, live them. Let others know when things are not going well. Ask for their ideas on turning things around. Can't deliver on a commitment? Keep all relevant people informed. Not just about the problem, but also steps you are taking to correct it.
- 8. Collaborate only so far, then stop? Include others in executing on decisions.** "Coming together is a beginning. Keeping together is progress. Working together is success." Henry Ford got it right. Collaboration does not stop with the decision. It is just the beginning. Make sure you involve others in the action plan moving forward. Share responsibility. Clarify who is accountable for different aspects of the project. Be clear. When working with your team, delegate as much accountability as you can. Responsibility helps to drive ownership. Be clear on expectations and milestones. Have a plan to check in with each other. Follow your plan. When you need to adjust the plan, do so together. Share information freely and encourage others to do the same. Be quick to let people know if there are external changes affecting the initiative. Keep people in the loop and ask them to do the same.

- 9. Making the wrong impression? Pay attention to your personal style.** Many times, negative personal styles get in the way of effective relationships. People who leave positive impressions get more things done with others than those who leave cold, insensitive, or impersonal negative impressions. Collaboration is easier when people are positive about each other. Convey warmth. Ask questions. Listen. Show your concern. Use humor. Offer your help. Be a person whom others want to be around. Still not sure how you are perceived? Ask for feedback about your personal style. From multiple sources (boss, peers, colleagues). Use various methods. In person. Via a 360 survey. Listen. Make a plan. Show them that you can handle criticism and that you are willing to work on the issues they see as important.

Want to learn more? Take a deep dive...

Charan, R. (2012, June 21). The discipline of listening. *Harvard Business Review Blog Network*.

Gallo, C. (2007, April 25). Rules for making a good impression. *Bloomberg Businessweek*.

Russell, N. S. (2012, August 20). 10 Ways effective leaders build trust. *Psychology Today*.

Smith, J. (2013, October 3). 10 Tips for getting your colleagues to work with you better. *Forbes*.

- 10. One-sided in your interactions? Be more cooperative.** If others see you as excessively competitive, they will cut you out of the loop and may sabotage your collaboration attempts. To be seen as more cooperative, explain your thinking and invite them to explain theirs. Generate a variety of possibilities first rather than stake out positions. Be tentative, allowing them room to customize the situation. Focus on common goals, priorities, and problems. Invite criticism of your ideas. Be helpful to others. Someone struggling with an issue? Read up on the subject. Offer them some suggestions. Know someone who's an expert in that area? Connect them. Someone stuck for ideas? Offer to brainstorm with them. See them making mistakes you've made? Offer to mentor. Have knowledge they don't? Share information. Look for ways to reach out and help others be successful. Be proactive. Look for ways to cooperate and support before you need to collaborate.
- 11. Getting competitive? Know the difference between healthy and unhealthy competition.** Research shows that organizations that encourage people to offer help and ask for help are more successful than companies that create unnecessary competition and a "taker" mentality. It is one of the strongest predictors of team success. One-upmanship, pride, ego, and "not invented here" mentality all get in the way of success. Working well with peers over the long-term helps everyone, makes sense for the organization, and builds a capacity for the organization to do greater things. It encourages collaboration. Often the least-used resource in an organization is lateral exchanges of information and resources. Share the wealth. Don't be afraid to help your peers. Shift your thinking from the needs of your area to what is best for the organization. Thinking at this higher level will help you avoid unhealthy internal competition. Review the performance metrics and measures you are using as a team. Consider whether they are detrimental to collaboration. If you gain, does someone else lose? Does your success create costs elsewhere? Are you competing for the same resources? Adjust where you need to, to encourage collaboration and teamwork.
- 12. Lacking self-awareness in conflicts? Monitor yourself in tough situations.** What's the first thing you attend to? How often do you take a stand vs. make an accommodating gesture? What proportion of your comments deal with relationships vs. the issue to be addressed? Mentally rehearse for worst-case scenarios/hard-to-deal-with people. Anticipate what the person might say and have responses prepared so as not to be caught off guard. Tend to think battle and justification? Think resolution and progress instead. Collaboration isn't caving to others' opinions. Rather, know where you stand and be able to communicate

your perspective and needs in a direct, concise, and clear manner. Support your viewpoint with specific background and explanation. Tie your views back to the organizational goals and priorities. Focus on solving the problem rather than winning the argument.

- 13. Are you taking all the credit? Pass along the praise.** When others have helped you achieve a goal, share the credit both privately and publicly. Tell others about cross-organizational collaboration. Talk about it with your team. With your boss. With your peers. When collaboration works, celebrate it. Show appreciation for the work of others. The more you talk about collaboration, the more people see its benefits. This helps generate more teamwork in the future. Celebrate accomplishments with your collaborators. Go out for lunch. Bring in dessert. Write personal thank you notes. Make sure that people know that you appreciate their work. When people feel recognized and feel that their contributions were noted, they are much more likely to want to work with you again in the future.

Want to learn more? Take a deep dive...

Ashkenas, R. (2011, August 2). Learning not to compete. *Harvard Business Review Blog Network*.

Frost, S. (n.d.). How to cooperate as a team member in a workplace. *Chron*.

Lipman, V. (2013, February 9). In praise of praise. *Forbes*.

Mind Tools. (n.d.). *Managing your emotions at work: Controlling your feelings...before they control you*. Mind Tools.

Job Assignments Specific to Your Role

- Resolve an issue or conflict between two people, partnerships or departments. Help them share their perspectives, build understanding, and bring the issue to resolution.
- Take on a project that is too large for one person and requires cross-organizational collaboration in order to achieve results and solve the problem.

Additional Job Assignments

- Work on a project with someone you've disagreed with in the past so you can practice give-and-take dialogue, working through conflict, and finding shared goals and values.
- Volunteer to make a presentation on a group project. Ask everyone who participated on the project to help with the presentation and then debrief the situation after you are done.
- Manage a cost-cutting exercise or a project where there are various perspectives and inherent conflict, where you need to solve the problem and keep all parties satisfied.

Take time to reflect...

If you have a tough goal that you're not sure how to reach...

...then others likely hold the key. You don't have to do it all yourself. You don't need to have all the answers. Partnering with people can make the path clearer and make solutions stronger.

If you'd rather do it yourself than collaborate with others...

...then realize that there are many risks to going it alone. Isolation. Overwork. Independence is great, but a soloist can't make a symphony.

If you focus more on your own victories than on shared success...

...then recognize that your talents, however great, are only part of the whole. Many heads are often better than one, and the overall result far greater.



Learn more about Collaborates

- Bateman, T., & Snell, S. (2012). *Management: Leading & collaborating in the competitive world*. New York, NY: McGraw-Hill.
- Covey, S. M. R. (2006). *The speed of trust: The one thing that changes everything*. New York, NY: Free Press.
- Hoppe, M. H. (2007). *Active listening: Improve your ability to listen and lead*. Greensboro, NC: Center for Creative Leadership.
- Katz, J. H., & Miller, F. A. (2013). *Opening doors to teamwork and collaboration: 4 Keys that change everything*. San Francisco, CA: Berrett-Koehler.
- Sawyer, K. (2008). *Group genius: The creative power of collaboration*. New York, NY: Basic Books.
- Vivona, J. M. (2009). Leaping from brain to mind: A critique of mirror neuron explanations of countertransference. *Journal of the American Psychoanalytic Association*, 57(3), 525-550.



Deep dive learning resource links

- Anderson, K. (2013, February 2). What makes collaboration actually work in a company? *Forbes*. Retrieved from <http://www.forbes.com/sites/kareanderson/2013/02/02/what-makes-collaboration-actually-work-in-a-company/>
- Ashkenas, R. (2011, August 2). Learning not to compete. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/08/learning-not-to-compete/>
- Charan, R. (2012, June 21). The discipline of listening. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/06/the-discipline-of-listening/>
- Cohen, G. B. (2009, September 29). Leadership: How to ask the right questions. *Bloomberg Businessweek*. Retrieved from http://www.businessweek.com/managing/content/sep2009/ca20090929_639660.htm
- Frost, S. (n.d.). How to cooperate as a team member in a workplace. *Chron*. Retrieved from <http://smallbusiness.chron.com/cooperate-team-member-workplace-11347.html>
- Gallo, C. (2007, April 25). Rules for making a good impression. *Bloomberg Businessweek*. Retrieved from <http://www.businessweek.com/stories/2007-04-25/rules-for-making-a-good-impressionbusinessweek-business-news-stock-market-and-financial-advice>
- Harvard Management Update. (2008, February 28). Exerting influence without authority. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2008/02/exerting-influence-without-aut/>
- Lipman, V. (2013, February 9). In praise of praise. *Forbes*. Retrieved from <http://www.forbes.com/sites/victorlipman/2013/02/09/in-praise-of-praise/>
- Mind Tools. (n.d.). *Managing your emotions at work: Controlling your feelings...before they control you*. Mind Tools. Retrieved from http://www.mindtools.com/pages/article/newCDV_41.htm
- Richardson, A. (2011, May 31). Collaboration is a team sport, and you need to warm up. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/05/collaboration-is-a-team-sport/>

Russell, N. S. (2012, August 20). 10 Ways effective leaders build trust. *Psychology Today*. Retrieved from <http://www.psychologytoday.com/blog/trust-the-new-workplace-currency/201208/10-ways-effective-leaders-build-trust-0>

Smith, J. (2013, October 3). 10 Tips for getting your colleagues to work with you better. *Forbes*. Retrieved from <http://www.forbes.com/sites/jacquelynsmith/2013/10/03/10-tips-for-getting-your-colleagues-to-work-with-you-better/>

Recommended search terms

If you'd like to explore Collaborates further, try searching online using the following terms:

- Building trust at work.
- Developing listening skills.
- Effective collaboration.
- Leaving a good impression on others.
- Monitoring your emotions at work.
- Working through informal work channels.

Communicates Effectively

Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.

Organizations thrive when the flow of information and ideas is timely and accurate. When quality of communication is a consistent high priority. Good communication results in mutual understanding, harmony, and action. Poor communication wastes time and resources, hinders goal accomplishment, and sours relationships. Leaders communicate to inform, persuade, coach, and inspire. People at all levels share ideas, learn from each other, and keep each other informed about problems, opportunities, progress, and solutions. Effective communicators provide a clear message that is understood by everyone in the audience. They are attentive listeners who are open to others' ideas. They deliver a message that is consistent but fine-tuned for a particular audience. It has just the right tone. The perfect pacing. The best possible wording. The audience finds the message to be crisp. Relevant. Impactful. Effective communication, whether written or verbal, enables you to convey your vision, to point the way forward, and to energize others to work together and pull in the same direction.

“Think like a wise man but communicate in the language of the people.”

William Butler Yeats – Irish poet

Skilled

Is effective in a variety of communication settings: one-on-one, small and large groups, or among diverse styles and position levels.

Attentively listens to others.

Adjusts to fit the audience and the message.

Provides timely and helpful information to others across the organization.

Encourages the open expression of diverse ideas and opinions.

Less skilled

- Has difficulty communicating clear written and verbal messages.
- Tends to always communicate the same way without adjusting to diverse audiences.
- Doesn't take the time to listen or understand others' viewpoints.
- Doesn't consistently share information others need to do their jobs.

Talented

- Delivers messages in a clear, compelling, and concise manner.
- Actively listens and checks for understanding.
- Articulates messages in a way that is broadly understandable.
- Adjusts communication content and style to meet the needs of diverse stakeholders.

- Models and encourages the expression of diverse ideas and opinions.

Overused skill

- May overinform, giving out information that isn't helpful or harms productivity.
- May try to win with style and communication skills over fact and substance.
- May invest too much time crafting communications.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Communicates effectively. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Dominates discussions.
- Messages lack focus.
- Doesn't listen.
- Shy.
- Doesn't write or use visual tools well.
- Doesn't connect to the audience.
- Avoids difficult conversations.
- Prepares poorly or not at all.
- Discourages the flow of ideas.

Does it best

Mention Martin Luther King Jr. and most people immediately think of his "I have a dream" speech. This 1963 speech has been ranked one of the greatest of the 20th century. One of the things that made his speech truly great was his ability to deviate from prepared notes and adapt his message based on what would best resonate with his audience. When a good friend in the audience shouted, "Tell 'em about the dream," King put his notes aside and improvised much of the second half of the speech, including the familiar refrain, "I have a dream." King told his story with the authenticity and conviction that moved people to act.^{8,9}

Tips to develop Communicates effectively

1. **Tend to be quiet? Push yourself to connect.** Each of us is wired differently. Extraverts get their energy from interactions with others. They may speak more easily, enjoy gatherings, and develop ideas out loud. Introverts may hold back more. They want to get more information before they speak. They prefer writing to speaking. If you are this quieter, more reserved type, recognize that others want to hear from you. They want to know your thoughts and perspective. So push yourself to be part of the conversation. Want more information before you speak? Show interest by asking questions. Feeling great about something? Let people know. Have a better idea? Follow up after the meeting ends. Like a book or helpful website? Send an enthusiastic e-mail. Let yourself pause when you need to think. Find quiet moments to gather your thoughts. But remember to join the conversation. You have a lot to add.
2. **Like to ensure you're heard? Quiet down and listen.** Energy can be engaging. But if you're too loud or talkative, you may alienate more quiet or task-focused colleagues. Maybe others can't get their work done

when you're around. Meetings can't start on time because you are busy with side conversations. Or others aren't heard because you dominate discussions. If you're naturally outgoing, practice a little self-observation to see if your behavior is a problem. Or ask others what they see. Then learn to quiet yourself down so that others can speak. Find other, appropriate outlets for your energy. At work, learn to respect others' space and time. Balance speaking with listening. Do you tend to speak more in meetings than anyone else? Are you always the first to answer a question or offer an opinion? Hold back. Let others speak first. Listen to what they have to say and then comment. Pace yourself. For every instance that you chime in to the conversation, don't speak again until two other participants have had a say. Occasionally, try saying nothing.

3. **Not open to others' ideas? Solicit input and discussion.** In love with your own ideas? Like to figure things out and do your own planning? Issue orders and give instructions? Effective communicators see the value of different perspectives. They listen to others, brainstorm ideas, and collaborate on plans. They are open to what they can learn. To improve as a communicator, set aside the need to know it all. Ask what others can contribute. Welcome divergent views. Put yourself in learning mode. Even when ideas conflict, new and better solutions can emerge. If you are closed to new ideas or think you already know everything there is to know, then you are not a great communicator. Period.
4. **Sending the wrong signals? Watch your non-verbals.** Pride yourself on preparing for meetings? Have all of your messages lined up and ready to deliver? Your preparation can be derailed by a few unconscious mannerisms or non-verbal habits. Non-verbals can cause distractions or send unintended signals like impatience, disinterest, or nervousness. To clean up your non-verbals, give others your full attention. Turn away from your computer, shut off your cell phone, and set distractions aside. Keep your facial expressions open and friendly. Watch out for habits like glancing at your watch, checking for incoming messages, or giving an impatient "I'm busy" look when people need more time. Avoid fidgeting. Don't let your eyes "glaze over." Stay focused and have good eye contact. Ask a few trusted friends what they've observed. Work on eliminating mannerisms that suggest you're disinterested.

Want to learn more? Take a deep dive...

Adams, S. (2013, November 19). How to communicate effectively at work. *Forbes*.

Charan, R. (2012, June 21). The discipline of listening. *Harvard Business Review Blog Network*.

Cherry, K. (n.d.). *Types of nonverbal communication: 8 Major nonverbal behaviors*. About.com Psychology.

5. **Using jargon or acronyms? Choose clear language.** Every group has a lexicon of its own. Teenagers. Politicians. Technical groups such as systems engineers. Functional groups such as finance and human resources. They use acronyms specific to their function or sector—ROIC for "return on invested capital" or OPEC instead of "Organization of the Petroleum Exporting Countries." They fall back on jargon, choose an abstract term, or string too many nouns together. Like writing "visual pattern identification depiction" when "map" would do. If you are writing or speaking for an insider group, you may not need to translate anything. In fact, it can make you sound more credible when you speak their insider lingo. But to reach a wider audience, you need to state things as simply as you can. Watch out for jargon, acronyms, and insider terms. Translate slang—especially if you are writing for an international audience. Watch out for spelling and usage errors. If you're a regular texter, you may have fallen into some bad habits. Ask someone from your target audience to review your work for clarity. Use grammar check in Word to flag any unusual constructions.

Use a thesaurus to find the best vocabulary. Use a style guide—such as Strunk and White's *The Elements of Style*—for ideas on how to make things clear.

6. **Communications missing the mark? Adjust for individual differences.** Do people sometimes not understand you? What you are saying seems perfectly clear to you. But others ask, “What exactly do you mean?” A lot of miscommunication occurs because people process information differently. Some get the picture without a lot of detail. Others need more explanation or examples to understand clearly. Some need an illustration or a case study. Others ignore the diagrams. Some like to take notes. Others retain most of what they hear. Don't assume that everyone processes information as you do. Get to know the communication styles of the people around you. Investigate what's worked before. What they relate to and what they don't. What pace is appropriate? What techniques they like? What holds their interest? What approaches have they rejected? What level of detail they've asked for from others? How do they provide information to others? (People often deliver as they like to receive.) Research your audience and tailor your approach.
7. **Don't know where to start? Create a plan and an outline.** Plenty of ideas to share, but find it hard to get started? Whether you are writing or presenting, whether your message is targeted for a large group or for a one-to-one dialogue, start by planning. Who is your audience? What is the main message? What is your main objective in communication? To inform? Entertain? Influence? Motivate? How much time or how many pages will you fill? Once you've identified these parameters, move on to the outline. State your message or purpose in one or two lead sentences. What in the introduction will grab the reader or the audience? Then outline three to five chunks of your argument to support your thesis. What are your priority points and how will you explain them? Organize the detail under the main points. Some points are made better by example, some by the logic of the argument, some by facts or stories. Check your facts and assertions for accuracy. Finally, how will you close? Do you want to move others to action? Or inspire them with a final, powerful message? Or maybe you just want to give them more resources for learning. Use your outline as you actually create the document or presentation. Change it only when there is a good reason to do so.
8. **Messages not flowing? Create a first draft—and then edit.** When you write, any sentence that does not relate to your main message should not be there. When you speak, everything you communicate needs to keep the audience engaged. Great writers and speakers seem to do this effortlessly. Their thoughts flow. Their words have rhythm and cadence. Their messages have immediate impact. You want to be great. But if you aim for perfection the first time, you can get stuck. Whether you are writing an article or creating a presentation, free up your writing by letting it all flow before you edit. Don't worry about grammar or the fine details of PowerPoint until you get your thoughts out. Get the words down first, then go back to make changes. Set your draft aside for 24 hours and then go back to it. You will see it with fresh eyes and have a better perspective on what needs to be changed. Read what you've written out loud to hear the places you can make changes. You will find new ways to make your writing or your presentation flow.

Want to learn more? Take a deep dive...

Belena, R. (2010, February 17). *Communication tips for avoiding the use of business jargon*. Inside Business 360.

Cohan, P. (2012, December 4). 5 Ways to communicate more clearly. *Inc.*

Nierenberg, A. (2005, February 17). *Adapting to different communication styles*. Small Business Advocate.

- 9. Lack impact? Amp up your personal power.** When you look your best, it makes an impression. Your posture, choice of wardrobe, and other factors send important signals. Look confident and approachable. Observe the people around you. Who consistently looks great? Who attracts you so that you want to work with them? Do they dress formally or informally? On-trend or conservatively? How about the people above you? What does “dress for success” look like in your organization? Now do an honest appraisal of yourself and your wardrobe. Toss out anything shabby, ill-fitting, or unflattering. Invest in a few new items that help you shine. Like suits or jackets for when you need to be more formal and some good-looking pieces for casual situations. Ask friends for some input and do the same for them. Consider your physical presence. Can you become more fit and energetic? Maybe you could get more sleep or eat better. Maybe you need a lunch-hour walking group or regular trips to the gym. The idea is not to become a clone of anyone else—but to present your best self. Have fun with this.
- 10. Need to hold attention? Ramp up the visuals.** We live in a visual age. Information comes in pictures and sound, via e-mail and video link. People scan documents rather than read them. They use an electronic newsletter to share information. They multi-task during dull conference calls. Cut through the clutter. People will listen and read—but they need shorter, more succinct messages and visual cues that tell them what is important. Remember that everyone is suffering from information overload. If an e-mail doesn’t grab the reader in less than 10 seconds, your whole message will be ignored. They need to see immediately why your presentation or document is worth their time and attention. Support conference calls with a few short slides. Break up a long document with call-outs and illustrations. Create section heads and use fonts effectively to keep the eye moving through long text. Great graphics are not a substitute for great thought—but they go a long way toward keeping the audience engaged.
- 11. Addressing multiple audiences? Adjust your message.** Unfortunately, one presentation or document generally does not play equally well across differing audiences. Whether you are writing or speaking, you will have to adjust the length, tone, pace, style, and even the message and how you couch it for different audiences. Writing for high-level management? Use an executive summary. At the end, tell them what decision you are asking for. If they indicate interest, follow up with the longer document. In formal presentations, keep the supporting visuals short and offer to send supporting data later. Adjust the supporting information to the needs of the audience. Need to keep the legal group informed? Supply them with the why, the history, parallels in the marketplace, legal potholes. Direct reports? They need implementation detail. You may need to write one long document and then break it up and move elements around for various audiences. Don’t try to make one document stretch. If you have time, run your speech or writing past someone who represents this group. If they understand your message, you have a better chance of reaching everyone.
- 12. Losing your audience? Check in with them.** You’ve identified your target audience. You’re pretty sure you understand their challenges. You’re speaking their language. You know why they would want to listen

to you. Then 10 minutes into your presentation you're seeing puzzled looks. Closed faces. People are fidgeting or checking their messages. This doesn't mean your presentation is a failure—but it's important to check in to find out what's going on. If you're losing your audience, stop what you're doing and ask what's going on. Are there any questions so far? Are you going too fast or too slow? Do people need a break? Maybe the room is too hot. Or it's the end of the week and people are just tired. Or they want to stop listening and discuss something you've said. Consider the audience as an important participant in your presentation. Change your pace or language. Move more quickly or slowly through the material. Be flexible in meeting their needs.

Want to learn more? Take a deep dive...

Harrison, C. (2007, December). *Who's your audience? Ways to win your audience through inclusion*. Toastmasters International.

Mind Tools. (n.d.). *Creating effective presentation visuals: Connecting people with your message*. Mind Tools.

Tardanico, S. (2012, May 29). Want to be a better public speaker? Do what the pros do. *Forbes*.

- 13. E-mail rhetoric heating up? Talk directly.** E-mail is essential to organizational communication. It's a great way to send info, set up meetings, convey documents, and make requests. But it's a poor way to convey emotion or discuss really complex matters. There's no tone of voice, body language, or facial cues to help the recipient interpret your mood. Taken out of context, "thank you" can sound grateful—or dismissive and sarcastic. Research shows that we lose half of our communication power when not face-to-face and an even higher percentage when not voice-to-voice. To avoid misunderstanding, soften your messages with greetings and appropriate personable comments, as you would in an informal letter or a phone call. Don't use e-mail to conduct an argument, convey hurt feelings, issue brusque orders, or justify your position to others. When an e-mail exchange is especially contentious, don't hit send until you've had time and space to reflect. Better still, when things get heated or emotional, reach for the phone instead. If you're in the same office, go and see the other person. Apologize for anything that has been misconstrued. Offer to have a full conversation and repair the damage before it starts.
- 14. Difficult conversation? Acknowledge emotions.** Emotional conversations are the most difficult. When you need to convey bad news. Deliver a poor performance review. Discuss conflict or a misunderstanding. If you are faced with a meeting like this, don't make the mistake of ignoring or avoiding emotions. Start by asking questions of yourself. What is it about this conversation that makes it difficult for you? What emotions or worries does it create? What emotional reactions might the other person (or group) have? Once you have acknowledged this, it will be easier to think about what information you need to communicate and the best way to do it. Process emotion, but don't get stuck there. Move on to what needs to be discussed. Focus on your main message and make sure it doesn't get buried by other information. Focus on a good outcome and create an understanding of next steps.
- 15. Driving a strategic message? Plan carefully and follow the plan.** There may be times when you need to lead or be part of a strategic communication. When strategy and timing are crucial. When confidentiality is paramount. Whether you're the CEO making an announcement, the head of a function or department, or a manager of a small team, determine which internal and external audiences you need to reach. When and how messages need to be communicated. Is this a crisis, a positive development, or the rollout of a new process? An internal message only or external as well? What media—including social media—will you use?

Who will speak? When will they speak? How will you balance the “need to know” with confidentiality issues? What role will managers and supervisors play in informing their staff? How will you handle leaks and rumors, both internally and externally? Whether you are a leader of the strategy or a communicator in the chain, respect the plan and process. Pull in resources from marketing, communications, HR, and/or legal to advise you.

Want to learn more? Take a deep dive...

Everse, G. (2011, August 22). Eight ways to communicate your strategy more effectively. *Harvard Business Review Blog Network*.

Federer, D. (2014, January 10). Have the difficult conversation. *Business Observer*.

Hughes, S. (2012, October 25). I banned all internal e-mails at my company for a week. *Forbes*.

Job Assignments Specific to Your Role

- Write a report justifying a major investment in new equipment, personnel and/or systems. Communicate the financial information clearly to engage and inform the reader.
- Lead a team discussion on how to improve their accountability and commitment to each other. Use this as an opportunity to involve everyone. Draw them into the conversation and make them feel involved.

Additional Job Assignments

- Lead or join a team charged with communicating a major change initiative in your function. Think carefully about the challenging messages that need to be conveyed and plan how you will cover them clearly and succinctly.
- Create and deliver a presentation on a new technological development that could revolutionize your business area. Think carefully about how you tailor the presentation to suit the audience.
- Collect ideas to improve a critical process in your function and write a synopsis discussing the merits of each.

Take time to reflect...

If you assume communication is simple to get right...

...then understand that it's just as simple to get it wrong. Take time to consider the feedback you receive. Make changes to hone your technique.

If you're lacking in confidence when you have to communicate...

...then allocate time for preparation. It often requires several “takes” to get the content and the style right. Planning and practice will give your confidence the boost it needs.

If your message doesn't land with the impact you want...

...then recognize that communication is far more than just getting the right words out. Whether through speaking or writing, having only one approach is too limiting. Planning the “how” is just as important as preparing the “what.”

r



Learn more about Communicates effectively

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- Bough, B., & Condrill, J. (2005). *101 Ways to improve your communication skills instantly* (4th ed.). San Antonio, TX: GoalMinds, Inc.
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- Hamilton, C. (2013). *Communicating for results: A guide for business and the professions*. Boston, MA: Cengage Learning.
- Weeks, H. (2008). *Failure to communicate: How conversations go wrong and what you can do to right them*. Boston, MA: Harvard Business School Press.



Deep dive learning resource links

- Adams, S. (2013, November 19). How to communicate effectively at work. *Forbes*. Retrieved from <http://www.forbes.com/sites/susanadams/2013/11/19/how-to-communicate-effectively-at-work-3/>
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Recommended search terms

If you'd like to explore Communicates effectively further, try searching online using the following terms:

- Adjust your presentation for the audience.
- Dealing effectively with difficult conversations.
- Effective two-way communication.
- How to adapt to different communication styles.
- Knowing your audience during presentations.
- Strategic communication.

Decision Quality

Making good and timely decisions that keep the organization moving forward.

Making good decisions can be challenging: Short time frames. Limited information. Impatient people waiting for answers in the face of difficult trade-offs. Good decisions are based upon a mixture of analysis, wisdom, experience, and judgment. Trouble is, people are not all that good at making decisions. They tend to overestimate their ability to make good judgments and are overconfident in forecasting outcomes. Making quality decisions in organizations today means working in an environment where ambiguity and uncertainty are the norm. Where considering whom to engage, what information to gather, and when to apply helpful tools are all considerations to take into account. Sound decisions come from a balance between speed and quality. Being totally correct all the time isn't a realistic goal. Instead, it's about being correct *enough* on decisions to move ahead and allow adequate time for effective execution.

“An expert is someone who has succeeded in making decisions and judgments simpler through knowing what to pay attention to and what to ignore.”

Edward De Bono – Maltese physician, author, and inventor

Skilled

Makes sound decisions, even in the absence of complete information.

Relies on a mixture of analysis, wisdom, experience, and judgment when making decisions.

Considers all relevant factors and uses appropriate decision-making criteria and principles.

Recognizes when a quick 80% solution will suffice.

Less skilled

- Approaches decisions haphazardly or delays decision making.
- Makes decisions based on incomplete data or inaccurate assumptions.
- Ignores different points of view or makes decisions that impact short-term results at the expense of longer-term goals.

Talented

- Decisively makes high-quality decisions, even when based on incomplete information or in the face of uncertainty.
- Actively seeks input from pertinent sources to make timely and well-informed decisions.
- Skillfully separates opinions from facts.
- Is respected by others for displaying superior judgment.

Overused skill

- Applies an overly rigorous or methodological decision process to all issues, even where experience and intuition can work equally well.
- Is overly confident about own decision-making capability; reluctant to delegate decision making to others or hesitant to involve others when generating solutions.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Decision quality. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Undervalues relevant data.
- Goes too fast or too slow.
- Avoids including others.
- Unaware of own biases.
- Not objective.
- Limited use of analytic tools.
- Conflict averse.
- Doesn't consider consequences.
- Seeks perfection.



Brain booster

Even if you're certain that your decision is the right one, pause. What beliefs, opinions, personal interests, favoritism, or prejudices may be influencing you? Our brains have developed numerous shortcuts that help us expend less energy, pay less attention, and make decisions more efficiently (though not necessarily more effectively). Unconscious biases may also be at play, for example: Confirmation bias: where you only see what you already believe to be true. Frequency bias: where you're more likely to believe something you hear or see repeatedly over time. Recency bias: where what you've learned most recently carries more weight. Negative bias: where stored negative emotional memories of similar situations or people cloud your judgment. Attachment bias: holding on to a status quo you helped shape. To mitigate against biases, work to surface any red flags—a third party can help. The point is not to let biases affect you or your team's ability to be objective. Take an extra moment to question your conclusions. What assumptions are you making? What might be making you biased or partial to one solution versus another? What alternatives did you not explore? Are there observations you made that contradict your overall impression of the situation? Are you ignoring contrary evidence? Turning your decisions over in your mind and evaluating them from all angles may prompt you to think differently or come to a different conclusion. At the very least, you can stick with your first decision with more confidence.¹⁵

Tips to develop Decision quality

1. **Not sure where to begin? Define the issue and map out a process.** A consistent finding is that most groups don't take enough time up front to define the situation—they jump to a conclusion or a solution. Rigor pays off. Establish what's at play and at stake—the context, parameters, scope. Next, define the intended outcome of the decision. How will you know if you made the right call? The clearer the criteria for

determining success, the better. Gather all the relevant data. Analyze it, interpret it, test your assumptions. Generate alternatives and evaluate them based upon what you want to accomplish. Invite open dialogue and healthy debate if that will help you determine the best course of action. Monitor what was intended against what actually happens so you can learn from the decision and make corrections where needed.

2. **Just going through the motions? Apply more rigor.** Avoid imprecise thinking when analyzing data and evaluating options. Do you state things as facts when they are really opinions or assumptions? Do you attribute cause and effect to relationships when you don't know if one really causes the other? Are you relying on decisions you made in the past rather than seeing the current situation with fresh eyes? Don't just collect data, figure out what it means for the short- and long-term. Write down your assumptions. Challenge them. Don't simply inform stakeholders of your progress, engage them in the process. When weighing alternatives, make rational comparisons against specific criteria (e.g., revenue, speed, customer retention). Anticipate potential glitches as best you can. Identify the pros/cons and costs/benefits of all possible solutions, then work to make the best ones even stronger before making a final decision.
3. **Want to analyze more data in less time? Turn to technology and tools.** It's impossible to eliminate all risks, but your chances of making good decisions will improve by using the right decision-making tools. An abundance of them exist. Analytic tools can help you explore the implications of potential scenarios. Make decisions about what to invest in or fund. Aggregate and synthesize data to gain insights from the past and better forecast the future. The latest technology is more precise than before and can help you analyze data in less time. Conventional capital budgeting tools work well too. Don't throw out tried-and-true decision trees, cost-benefit analysis, and plus-minus methods. Instead, add to them selectively. The choice of tools may seem overwhelming at first. Having too many options—even good ones—can cause “decision paralysis,” as Dan and Chip Heath describe in *Switch*. Decision paralysis happens when people freeze and don't pick anything at all when they're overloaded. So get some recommendations. Ask experts to help you select the best decision tools for your specific situation.

Want to learn more? Take a deep dive...

Teepe, T. (2009). Problem solving ideas that work [YouTube].

Wolf, R. F. (2012, September 24). How to minimize your biases when making decisions. *Harvard Business Review*.

Zwilling, M. (2011, July 19). *Nine steps to effective business problem solving*. Business Insider.

4. **Wonder who to include? Let the demands of the situation guide you.** You want to make the best decision you can. How you arrive at what *best* means will vary. Sometimes it's appropriate to make the call alone, other times it's best to engage others. Consider complexity, expertise, execution, and timing. The more complex the situation is, the more you'll need multiple perspectives. When people hold different pieces of the information puzzle, you need to bring them together. The more that commitment is required for follow through, the more you should involve the people responsible for execution. If you want to develop people's leadership skills, push decisions down to the lowest possible level. If a decision needs to happen fast (like in a crisis) and you are the expert, make it yourself. Be up front about what decision process you'll use. If you want someone's advice but know they won't have a say in the final decision, just tell them. Trust can erode if you ask for someone's opinion but don't use it. In all cases, explain to stakeholders how the decision came about.

5. **Too much agreement in the group? Encourage open dialogue and debate.** When all heads nod and people see issues similarly, the decision-making process goes faster. But faster doesn't necessarily lead to better. To reach optimum decisions, all angles of an issue need to be discussed. Don't stop when the first acceptable solution is presented. Welcome dissenting voices—they enhance decision quality by forcing people to expand their perspectives. Separate the facts from the opinions. Spark debate through questioning. What are our assumptions? What's missing? What's another way to interpret the data? What other alternatives could work? What's the best possible end result? What might go wrong? Another approach is to assign someone to play devil's advocate—to poke holes in the current logic. Do whatever you can to reduce groupthink, which is conformity of opinion. Pressure to conform can cause people to censor their views and ignore vital data. Whether you're the decision owner or contributor, insist on candid dialogue.
6. **Virtual teams need decision-making assistance? Use collaboration tools.** There are many benefits to virtual teaming, but one drawback is the loss of communication horsepower due to limited face-to-face communication. Language barriers and the lack of non-verbal cues can at times strain mutual understanding, which is needed for making quality decisions. However, research shows that there are also advantages to asynchronous communication when instant decisions aren't required. By using virtual collaboration tools, people have more time to carefully write or illustrate their point of view. More time to reflect on others' ideas or data presented before responding. There's less a chance of hasty judgment. Of missing what someone said. Of a strong personality taking over a conversation. In addition, relevant information can be stored and retrieved in the future.

Want to learn more? Take a deep dive...

Harvard Business Review. (2013). The management tip: Tips on decision making. *Harvard Business Review*.

John, C. (2013). How to establish open communication at work. *Chron*.

Shaughnessy, H. (2013, December 9). 15 Ways to make much better decisions. *Forbes*.

7. **Need to speed things up? Counter overthinking with action.** Lots of us want all the data in and all our ducks in a row before we decide. We want to be 100% sure. Nice in theory, but that slows you down. Perfectionism is tough to let go of because many people see it as a positive trait for themselves. Recognize your perfectionism for what it might be—collecting more information to improve your confidence to make a fault-free decision, thereby avoiding risk and criticism. Try to reach a more reasonable balance between thinking it through and making the call. Try making some small decisions on little or no data, using expertise or past experience as a guide. Anyone with 100% of the data can make good decisions. The real test is who can act the soonest with a reasonable amount—but not all—of the data. Give yourself a deadline and stick to it.
8. **Not sure the timing is right? Listen to your own clock.** How do you know if it's important to decide now or if it may be better to wait? When urgency is the new normal, it can be tempting to charge ahead, even when evidence—or lack of evidence—suggests otherwise. Recent information may have shifted the success criteria. New data may reveal additional risks. A deadline may not really be firm—especially in ambiguous or rapidly changing industries, or when cutting-edge differentiation is key. Some of the most respected leaders have put quality, safety, or innovation ahead of a predetermined timetable. Pulling the

plug or testing things further before making a decision may serve the best interests of your stakeholders in the long run. Keep your strategic priorities top of mind and be willing to adjust the timing.

9. **Tempted to bend the rules? Do the right thing.** Wise decision making requires you to be ethical—to uphold standards of right and wrong. People rarely start their careers planning to be unethical. More often it comes about slowly, little by little. Here are some justifications people give for making unethical decisions: *Everyone else is doing it. Nobody will find out. My boss told me to. The end justifies the means. It's not exactly illegal. We didn't have time to check. It won't hurt anybody.* See these rationales for what they really are: excuses. Read your organization's ethical guidelines and principles. Discuss them with your team. What would small and large ethical breaches look like? What consequences might occur? What do you do if you find yourself in a gray zone? Ask difficult questions. Don't hedge the truth. Make it safe to disclose mistakes. Recognize when greed, ambition, or needing to cover one's hide creeps in. It's everyone's job to uphold high standards of professional responsibility in decision making.
10. **Want to best ensure a quality decision? Keep things in balance.** When a quality decision is what you're after, you need to find the right balance among many factors. There's the need for divergence—so you consider differing views and options with an open mind. And the need for convergence—so you make a timely decision and people unite prior to implementation. There's the need to balance advocacy (making convincing arguments) alongside inquiry (asking powerful questions). There's having the courage to make tough calls. And having courage to let go, letting others decide. There's balancing facts and logical reasoning with intuition. There's quality versus speed. The desire to get it right at odds with the need to move on to other things. Review your decisions over time. Which ways do you tend to lean? What's been your track record? Aim to strike the right balance.

Want to learn more? Take a deep dive...

Batista, E. (2013, November 8). Stop worrying about making the right decision. *Harvard Business Review*.

Denning, S. (2012, April 24). How are really great decisions actually made? *Forbes*.

The Staff of the Corporate Executive Board. (2011, December 12). Preventing 'Analysis Paralysis.' *Bloomberg Businessweek*.

Job Assignments Specific to Your Role

- Be part of a talent review or hiring process, making people decisions for the organization or club as objectively and unbiased as possible.
- Make a strategic decision on where to invest future resources (new locations, new services, new systems, etc.). Evaluate alternatives using the best-suited analytical tools combined with the judgment of experienced stakeholders.

Additional Job Assignments

- Join a task force making decisions on an important issue, where you will need to share information and consider the long- and short-term implications for the business.
- Manage the procurement of important services, equipment, supplies, systems, etc., gathering diverse input from stakeholders and analyzing the data before making the call.

Take time to reflect...

If you tend to be impulsive and plunge right in...

...then consider that investing time up front can save time later on. If you rush now, you might have to revise or repair later. Stop. Consider. Choose your direction more wisely.

If your personal views often seem to take precedence...

...then recognize that stepping back from your own views may improve the quality of your decisions. Gathering the facts and analyzing the information available will help you be far more objective.

If you worry about not having the answers required...

...then understand that it doesn't all have to be down to you. Inviting other people's input can add a new dimension to the decision-making process with the added benefit of taking some pressure off you.



Learn more about Decision quality

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Haines, S. G. (2006). *The top 10 everyday tools for daily problem solving: Strategic thinking handbook #1*. San Diego, CA: Systems Thinking Press.

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Janis, I. L. (1982). *Groupthink: Psychological studies of policy decisions and fiascoes*. Boston, MA: Cengage Learning.

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Deep dive learning resource links

Batista, E. (2013, November 8). Stop worrying about making the right decision. *Harvard Business Review*. Retrieved from <http://blogs.hbr.org/2013/11/stop-worrying-about-making-the-right-decision/>

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Zwilling, M. (2011, July 19). *Nine steps to effective business problem solving*. Business Insider. Retrieved from <http://www.businessinsider.com/nine-steps-to-effective-business-problem-solving-2011-7>

Recommended search terms

If you'd like to explore Decision quality further, try searching online using the following terms:

- Avoiding groupthink.
- Effective decision making.
- Effective problem solving.
- Encouraging open dialogue at work.
- Making smart decisions.
- Reducing (confirmation, frequency, recency, negative, attachment) bias.

Develops Talent

Developing people to meet both their career goals and the organization's goals.

Most people want to grow and develop. To be as effective as possible and able to take on bigger, more significant challenges. Organizations need people to develop as the nature of their role, and the organization, changes. Talent development is about creating pools of people ready and willing to take on new challenges and step up when needed. It's a continuous process of building skill and capability at an individual and organizational level. It works best as a three-part harmony. First, the person needs to be ambitious and willing to do what's required to grow and progress. People won't grow if they don't want to. Second, the organization has to have a process in place to help those who want to grow. People won't grow if the organization shows no interest and offers no support. And third, those with responsibility for developing others have to be prepared to play an active part. People won't grow if you don't make it a priority. Without your time, interest, and effort, people won't develop to their full potential. People need support. Get it right and you'll develop a more effective, efficient, productive, and motivated workforce.

*"The mediocre teacher tells.
The good teacher explains.
The superior teacher demonstrates.
The great teacher inspires."*

William Arthur Ward – American writer

Skilled

- Places a high priority on developing others.**
- Develops others through coaching, feedback, exposure, and stretch assignments.**
- Aligns employee career development goals with organizational objectives.**
- Encourages people to accept developmental moves.**

Less skilled

- Doesn't take time to work on development of others.
- Is a check-the-box developer; goes with the easiest option to fulfill talent development obligations.
- Doesn't make use of available organization resources and systems to develop others.
- Has difficulty identifying developmental moves or assignments.

Talented

- Views talent development as an organizational imperative.
- Consistently uses multiple methods to develop others.

- Stays alert for developmental assignments both inside and outside own workgroup.
- Readily articulates the value and benefit of stretch assignments to others.

Overused skill

- Concentrates on the development of a few at the expense of many.
- Overestimates people's capacity for growth.
- May be too quick to adopt faddish development approaches.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Develops talent. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Doesn't believe people really want to develop.
- Thinks development is someone else's responsibility.
- Doesn't have the time for it.
- Doesn't know how to develop people.
- Reluctant to share the spotlight.
- Poor coaching skills.
- Shies away from giving developmental feedback.
- Lacks patience.
- Has a one-dimensional view of how people develop.

Did you know?

Providing the career development your team members need is critical if you are to retain your top talent. It's not surprising, then, that failing to deliver on this is likely to be one of the strongest drivers for your high-potential employees to seek their development somewhere else. A survey of over 1,200 high achievers, averaging 30 years old, revealed that 95% of them regularly engaged in job-search activities. Dissatisfaction with the development available to them featured strongly in their decision to leave their organization. On the whole, they were satisfied with their on-the-job development, which included being placed in high-visibility positions, increased responsibility, etc. But one of the most significant factors fueling early exit was lack of *formal* development to support them in those high-visibility positions. Formal development like mentoring, coaching, and training courses. While the research is clear that 70% of development comes from job experiences, importance of the 20% they gain through learning from other people and the 10% through formal learning programs shouldn't be ignored. Offer a balanced menu of development opportunities to ensure you retain your talent.^{16, 17}

Tips to develop Develops talent

1. **Never have career conversations? Start talking.** While it's not your responsibility to own and drive another's career, you do play an essential role in supporting them to do this for themselves. That's where career conversations come in. Take time to have these future-focused, one-on-one conversations at least once a year. Prepare for the conversation by reflecting on what you see as the person's potential. What's the highest level you believe they can reach? What do you see as their strengths? Key development needs?

Potential next assignment? Ask them to share their thoughts on where their career is headed. What they want to achieve short- and long-term. Do they have the desire (and potential) to reach a senior-level leadership position? Or are they focused on deepening their technical expertise? Listen to what you hear and let them know where they stand. Be honest. Use what you hear to differentiate talent and the way you develop it. Remember, if you don't know where a person is headed, you can't help them get there. And one-size-fits-all development is rarely effective.

2. **Too busy? Prioritize the time.** Do you try to focus on developing others but find that other activities have higher priority? For most people, time is what they have the least of to give. But to help others develop beyond today's job, you need to prioritize, on average, eight hours per year per person. Two hours are for an annual appraisal of the person in terms of current strengths, weaknesses, and competencies they need to develop. Two hours are for an in-depth career discussion with each person. Two are for creating a development plan with the person. And the last two hours are there should you need to present findings and recommendations in a succession planning process or arrange for developmental events to take place. Start scheduling in time for developing others. Make it a priority to help people grow. You, your team, and the organization will benefit from increased performance and people feeling happier in their jobs.
3. **Could your experience help others? Be a mentor.** Mentors play a critical role in supporting career development through the offer of experience-based insight and guidance. Before you agree to mentor someone, check that they're following a career path that is similar to yours. To mentor well, you need to have already "walked the path" of the mentee. Spend time with them on a regular basis. Find out what specifically they would like support with. Focus on being a positive guiding influence. On encouraging them to look at situations from different perspectives. On offering non-threatening critique and challenge. Work on building their confidence. Share knowledge, experiences, and perspectives that can help them find creative solutions to problems, make decisions, and shape their career. If your organization has a mentoring program, find out how it works. If it doesn't, set one up within your unit or function.
4. **One-dimensional view of development? Think 70:20:10.** Research tells us that around 70% of learning comes from practice—from on-the-job experience. From completing assignments and tasks that are challenging. About 20% comes from the feedback, coaching, and mentoring we get from others. And 10% comes from formal, instructional activities such as training programs, reading books, etc. Help others create development plans that are three-dimensional. For example, if someone is looking to develop leadership capability, you might encourage them to read a biography, attend a course. Offer to support them finding a mentor, someone whose leadership they admire. Someone they could study, spend time with, listen to, and learn from. And help them find opportunities to apply their learning in real situations and reflect on what they learned from it. Why is this three-dimensional approach so important? Research indicates that the learning that occurs outside formal classes and courses is generally more frequent and effective than its formal counterpart.

Want to learn more? Take a deep dive...

Fast Company Staff. (2005, May 2). Learn more now. *Fast Company*.

Gallo, A. (2011, February 1). Demystifying mentoring. *Harvard Business Review Blog Network*.

Gallo, C. (2013, June 21). Seven ways to inspire employees to love their jobs. *Forbes*.

Gardner, J. (2011, August 31). *Keep your team by keeping them learning*. Business Insider.

5. **Want to encourage self-awareness? Give and facilitate feedback.** Most people are motivated by feedback for three reasons. First, it helps them understand how they're doing against their goals, what they're doing well, what they need to improve, and how they're impacting others. It enables them to make midcourse corrections. Second, it shows them what they are doing is important and that you're there to help. Third, it's not the "gotcha" game of negative and critical feedback after the fact. If there are negatives, they need to know them as soon as possible. Encourage people to get feedback from multiple sources, including you, on what matters for success in their job. Formal 360 feedback is a great place to start. If they have direct reports and peers, recommend asking their associates for comments on what they should stop, start, and continue doing to be more successful. Be straight with your people. Give as much real-time, accurate, and balanced feedback as you can.
6. **Want to encourage personal responsibility? Coach.** Coaching puts an individual firmly in the driver's seat of their own development. And, it requires your letting go of control and resisting the urge to "tell" them what and how to develop. As a coach, your role isn't to know the right answers, it's to know the right questions. Questions that are thoughtfully constructed with the aim of facilitating a person's thinking around their development. Questions that help them gain clarity on where they're heading, "What's *your* goal?" That encourage them to explore where they are in relation to their goal, "Where are *you* right now?" "What else do *you* need to do to get there?" Questions that encourage action-oriented thinking, "What alternative courses of action could help *you* move forward?" "What might help or hinder *your* progress?" Questions that commit them to ownership and action, "What will *you* do now?" "By when?" "How will *you* measure progress and success?" Be specific with the use of *you/your* in the questions—it reinforces that the responsibility sits with them.
7. **People getting too comfy? Challenge and support them.** Remember, real development is not cozy or safe—it comes from varied, stressful, and adverse tasks that require us to learn to do something new or different, or fail. It involves real work. It's rewarding but scary. Be open with your people about this. Work with them to identify challenges that force them out of their comfort zone. Consider tasks that are no longer developmental for you but would be for others and delegate them. Trade tasks and assignments between two people—have them do each other's work. Assign a task that the person hasn't done before. Provide support. It sends a message that there's safety on the other side. It helps people cope with the pain of developing while maintaining a positive view of themselves as a capable, worthy, valuable person who can learn and grow. Without support, the developmental experience may overwhelm them rather than foster learning. Cheer from the sidelines and celebrate their accomplishments, even the smallest.
8. **Underperformers? Take action.** Few people come to work with the intention of doing a bad job. Find out the cause and take action to address it. Perhaps they haven't had adequate opportunity, support, and time to achieve the required performance level? If you can offer more, and the role is achievable for them, create a development plan for them that focuses on lifting performance. Maybe the role isn't suited to their talents. You may need to support them in moving on, either to a more suitable role at the same level within the

organization or one with less responsibility. In some cases, it may be more appropriate to initiate a process to exit them from the organization. Demoting or exiting a person is a tough thing to do. But, longer-term, it may be the most effective action for the future performance of both your workgroup and the individual.

Want to learn more? Take a deep dive...

Colan, L. (2013, July 29). 4 Keys to coaching underperforming employees. *Inc.*

Coutu, D. (2008, December 29). What coaches can do for you. *Harvard Business Review Blog Network.*

Joseph, C. (n.d.). The ways to challenge employees. *Chron.*

Murphy Paul, A. (2013, March 18). Four ways to give good feedback. *Time.*

- 9. Focused on developing skills for today? Look to the future.** Take a longer-term view of developing talent. Of creating a workforce that can meet the demands of today while rising to the challenges of tomorrow. Start with the current state. Where is the organization now? What skills and capabilities does it have in place? What does it need? Then look to the future. Where is the organization moving to? What skills and capabilities will be critical to future success? What's the gap between the current and future state? You may have the right level of skill and capability in place. You may find there are gaps. Either way, you'll have the clarity you need to create and implement a longer-term strategy for talent development. Involve others in the creation of the strategic plan where you need to. Share the vision and purpose of the development effort. Tell them why it's important and what they and others stand to gain.
- 10. Development happening in silos? Work as a collective.** Make collaborative development conversations a regular part of your people agenda. Seek out HR partners and talent managers beyond your unit. Get together regularly for the sole purpose of talking about people and talent development. Discuss what each of you is doing. Share best practices and review talent pools (high potentials, new recruits, graduates, etc.) and succession plans. Identify development opportunities (vacancies, assignment moves, coaching, training courses, etc.) that are coming up. How can you best offer them to people? What can you do collectively to help people gain the right skills and experience to meet the needs of the business now and in the future? Commit to action and hold each other accountable for following through. Let people know you're having these conversations. Show you're taking development seriously.
- 11. Limited opportunity to promote people? Encourage lateral moves.** You can't create promotion opportunities that don't exist. For those ready to step up, this can be a cause of frustration. Lateral moves are a great alternative to keep people motivated and challenged while they wait for that promotion opportunity. Besides, advancement may be more likely if they've developed broader skills and experience. Find out what skills they would benefit from developing. What new responsibilities they could take on. What experience they'd like to gain. Help them look for a temporary or permanent assignment that fits their need, moves them forward developmentally, and increases their visibility in the organization. Visibility is vital when it comes to being considered for new opportunities. Support their transition. They may not be moving up, but they could be going from knowing the most to learning the most, which is daunting. Give others outside your team/unit the opportunity to make a lateral move into your team/unit where you can. Global context? Look at opportunities for international moves.
- 12. Want a strong succession pipeline? Focus on developing leaders.** Make the development of leaders, from first level to senior executive, a core part of your people strategy. Don't know who the leaders of the future are? Identify them. Focus on developing them through a range of techniques. Go beyond traditional

programs. Use conferences or leadership summits as development opportunities. Devise a curriculum that focuses on supporting people through key leadership transition points. Raise the profile of high potentials through board breakfasts or similar meetings. Offer internal or external coaching and mentoring. Find specialized development assignments that focus on leadership. Encourage action- and experience-based learning by bringing people together to work on solving real business problems. Research shows that the best organizations for leaders are typically twice as likely to use a variety of developmental techniques for their best and brightest.

- 13. Frustrated when others don't want to progress? Value depth of expertise.** Not everyone is pushing to be promoted or to be the next CEO. Some are satisfied to focus on what they do to the best of their ability, even if it limits their career options. While you should advise them of the consequences, all organizations need strong performers dedicated to skill-building in their current area only. Don't imply that someone who likes to execute must become a strategist to be valued. Instead, create more ways for people to excel and get status recognition. If a person wants to be a customer service representative for life, recognize that as critical and help the person develop in every way possible within that area.

Want to learn more? Take a deep dive...

Bregman, P. (2013, September 3). Four areas where senior leaders should focus their attention. *Harvard Business Review Blog Network*.

McGregor, J. (2011, October 13). How to make a smart lateral career move. *Fortune*.

Myatt, M. (2012, December 19). The #1 reason leadership development fails. *Forbes*.

The Wall Street Journal. (n.d.). How to develop future leaders. *The Wall Street Journal*.

Job Assignments Specific to Your Role

- Volunteer to mentor someone outside of your direct reporting. Understand their goals and expectations and make sure you're tailoring your approach to meet their needs.
- Take responsibility for developing an underperformer. Start by giving them a fair and accurate appraisal of their current strengths and weaknesses and clarify the performance gap.

Additional Job Assignments

- Offer to lead the creation of a two- to five-year capability development plan for your unit. Focus on the organization's strategy and the skills and abilities required to achieve it.
- Manage a team of inexperienced people. Work with each individual to create a 70:20:10 development plan to build the skills they need. Review and appraise progress regularly.
- Lead the setup of a people development forum across your unit/organization. Showcase best practices, break down silos, and share talent more effectively.

Take time to reflect...

If you think helping others develop isn't your job...

...then recognize that it's potentially part of everyone's role. Develop the habit of providing support and guidance. Help people when they're stuck. Become a spontaneous coach. Do a little every day.

If you expect that people should learn on their own time...

...then understand that most learning comes from ongoing experience. Helping people see the learning opportunities in everything they do is helping them to develop.

If you're focused on the skills that are needed today...

...then ask yourself what will be needed tomorrow. Starting to build these capabilities now will give you a head start for the future.



Learn more about Develops talent

- The Best Practice Institute, Goldsmith, M., & Carter, L. (Eds.). (2010). *Best practices in talent management: How the world's leading corporations manage, develop, and retain top talent*. San Francisco, CA: Pfeiffer. Harvard Business School Press. (2009). *Harvard Business Review on developing high-potential leaders*. Boston, MA: Harvard Business School Press.
- Hunt, J. M., & Weintraub, J. R. (2010). *The coaching manager: Developing top talent in business* (2nd ed.). Thousand Oaks, CA: Sage.
- Lawler, E. E., III. (2008). *Talent: Making people your competitive advantage*. San Francisco, CA: Jossey-Bass.
- Smilansky, J. (2007). *Developing executive talent: Best practices from global leaders*. Chichester, West Sussex, England: John Wiley & Sons.



Deep dive learning resource links

- Bregman, P. (2013, September 3). Four areas where senior leaders should focus their attention. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/09/four-areas-where-senior-leader/>
- Colan, L. (2013, July 29). 4 Keys to coaching underperforming employees. *Inc.* Retrieved from <http://www.inc.com/lee-colan/4-keys-to-coaching-underperforming-employees.html>
- Coutu, D. (2008, December 29). What coaches can do for you. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2008/12/what-coaches-can-do-for-you/>
- Fast Company Staff. (2005, May 2). Learn more now. *Fast Company*. Retrieved from <http://www.fastcompany.com/919020/learn-more-now>
- Gallo, A. (2011, February 1). Demystifying mentoring. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/02/demystifying-mentoring/>
- Gallo, C. (2013, June 21). Seven ways to inspire employees to love their jobs. *Forbes*. Retrieved from <http://www.forbes.com/sites/carminegallos/2013/06/21/seven-ways-to-inspire-employees-to-love-their-jobs/>
- Gardner, J. (2011, August 31). *Keep your team by keeping them learning*. Business Insider. Retrieved from <http://www.businessinsider.com/keep-your-team-by-keeping-them-learning-2011-8>
- Joseph, C. (n.d.). The ways to challenge employees. *Chron.* Retrieved from <http://smallbusiness.chron.com/ways-challenge-employees-11946.html>
- McGregor, J. (2011, October 13). How to make a smart lateral career move. *Fortune*. Retrieved from <http://management.fortune.cnn.com/2011/10/13/career-lateral-move/>

Murphy Paul, A. (2013, March 18). Four ways to give good feedback. *Time*. Retrieved from <http://ideas.time.com/2013/03/18/four-ways-to-give-good-feedback/>

Myatt, M. (2012, December 19). The #1 reason leadership development fails. *Forbes*. Retrieved from <http://www.forbes.com/sites/mikemyatt/2012/12/19/the-1-reason-leadership-development-fails/>

The Wall Street Journal. (n.d.). How to develop future leaders. *The Wall Street Journal*. Retrieved from <http://guides.wsj.com/management/managing-your-people/how-to-develop-future-leaders/>

Recommended search terms

If you'd like to explore Develops talent further, try searching online using the following terms:

- Coaching employees.
- Dealing with underperforming employees.
- Developing employees for future success.
- Focusing on leadership development.
- Mentoring employees.
- Ways to challenge your employees.

Financial Acumen

Interpreting and applying understanding of key financial indicators to make better business decisions.

Finance is about how organizations generate, preserve, account for, spend, manage, and move money. Every organization needs to be concerned with its financial health. Failure to keep a laser focus on financial matters will ultimately doom most any enterprise. Every part of an organization, whether for profit or not, is impacted directly or indirectly by financial results. Finance is at the core of business activities. It affects how an organization raises capital, analyzes and values investments, develops and executes plans, pays for improvements, and pays its taxes. As central and important as finance is, studies show it is not well understood outside of the specific domains of finance, accounting, and audit functions. You don't need to be a finance expert, but you do need acumen on the fundamentals, at minimum. People at all levels need to understand the financial information that is relevant to them so that they can act on it. To be successful as a leader, you need to not only understand finance, but also know how to incorporate a financial thinking lens into every major decision you make.

“Know your numbers’ is a fundamental precept of business.”

Bill Gates – American businessman and philanthropist

Skilled

- Understands the meaning and implications of key financial indicators.**
- Uses financial analysis to generate, evaluate, and act on strategic options and opportunities.**
- Integrates quantitative and qualitative information to draw accurate conclusions.**

Less skilled

- Is unfamiliar with financial terms.
- Is unclear about the cause-and-effect relationships among different business functions and overall financial performance.
- Pays little attention to financial impact when drawing conclusions.

Talented

- Transforms financial information into business intelligence through analysis and integration of quantitative and qualitative information.
- Identifies and monitors key financial indicators to gauge performance, identify trends, and suggest strategies that can impact results.

Overused skill

- Uses financial indicators as the only decision criteria, leading to an unbalanced view of organizational performance that is narrowly focused on financial outcomes.
- May sacrifice long-term business objectives for short-term financial gains.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Financial acumen. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Overwhelmed by data.
- Not curious.
- Ignores financial information.
- Doesn't think strategically.
- Lacks basic financial skills.
- Unaware of how finance drives the business.
- Makes emotional decisions.
- Leaves finance to others.
- Doesn't dig for root causes.

Did you know?

Developing financial acumen early in your career works in your favor, especially if your goal is to attain the top job at an organization. Roughly 30% of Fortune 500 CEOs spent the first few years of their careers developing a strong foundation in finance. But that doesn't mean financial acumen alone will get you to the head of the table. Of those Fortune 500 CEOs who started early in finance, only 5% were promoted directly from CFO positions. Most of them came from broader COO or president positions. So, the message? Build your financial acumen early. Keep developing it. Combine it with a broader working knowledge of the business. Breadth of knowledge and experience built on a solid financial foundation could be your ticket to the top.^{25, 26}

Tips to develop Financial acumen

1. **Don't know the basics? Get training.** Finance can feel like a strange terrain where people speak a foreign tongue. According to a 2009 article in *Harvard Business Review*, a sample of US managers scored an average of 38% on a test of financial literacy. Most didn't know the difference between "profit" and "cash." Or between an income statement and a balance sheet. Two-thirds did not understand that discounting prices affects gross margins. Financial information is critical to your decisions. So if you're at a loss, learn what you need to know. Get an explanation of basic techniques and the language of financial analysis. Trends. Benchmarks. Common size. Percentage change. Ask an analyst to explain the business models and tools used in your organization. What do they measure and why? Where does the data come from? What else do we need to know? Find out how an auditor looks at your operations. Learn to use budgeting and planning software. Find a book or search online to become familiar with terms like Economic Value Added (EVA) or value-based management. Assemble a study group or ask if your organization or a local college provides training in the basics of finance. A course like Basics of Budget Management or Finance for Non-Financial Managers can be invaluable in helping you think about the business in the right way.

- 2. Think finance is not your responsibility? Get involved.** It's easy to consider finance the responsibility of the CFO and strategic thinking something that happens only in the C-suite. If you're more junior, you might not think much about how your decisions affect the overall organization. If you lead a function like human resources or marketing, you might tune out when financial questions are raised. But it is in everyone's interest to include cost, investment, and other financial considerations in decisions. Regardless of which department you're in, you can't be an effective strategic partner without demonstrating a solid understanding of finance. Apply your own function's lens to financial matters. In human resources, how do staffing considerations, retirement benefits, or health care costs affect the bottom line? If you are in engineering, what is the financial contribution of better design or processes? In product or service development, how do economies of scale affect pricing and profitability? Even in a non-profit, costs, funding, and the economic benefit of best practices are critical factors for success. Challenge your own thinking as well as others'. Ask questions. Explore "what if" scenarios. Work with analysts to run financial models. Find ways to constantly upgrade your skills and thinking.
- 3. Focus too narrow? Expand your perspective.** Do you lead a business unit, manufacturing facility, or other operational unit? In charge of a functional group such as IT, legal, or distribution? If so, you may focus your financial leadership solely on your department or operation. Step outside of your silo and consider the wider picture. Get a full perspective of how your unit contributes to the whole. Understand how the business works—how it functions within its industry. Start by subscribing to great publications such as the *Wall Street Journal*, *Fortune*, *Inc.*, *Barron's*, the *Economist*, *Harvard Business Review*. Scan them regularly for events and trends that affect your business now. Sign up on sites like Hoover's, LinkedIn, or Dun & Bradstreet to receive updates on companies you want to follow. Read annual reports and business blogs. Download business/industry/future-oriented articles on your tablet to read when you are traveling. Join or form an executive networking group. Get their take on the economy and what is happening in their industries. Talk to other executives. Engage your CFO or CEO in a broad conversation about the business. Build out your sources of information so that you have a pulse on the different levers that drive business. Challenge yourself to explore a new idea every month.
- 4. Emotional about decisions? Ground yourself in data.** Depending on the issue, you may feel very strongly about the outcome. Or maybe there is a great deal at stake and the wrong decision could have serious consequences. Emotions fuel our passion. They provide energy for decisions. But we can't operate on emotion alone. Numbers aren't everything but they are a good way to stay grounded when tough decisions are needed. Acknowledge feelings, then turn to the numbers. Pull together a team to share the decision making. Get your CFO or financial analyst involved. Ask: What can good financial modeling tell us about the future? What does accounting tell us about the past? What is at risk? Based on these facts, how do we make the best decision—now—to assure the long-term prosperity of the organization? Make your decision only after you consider all sides of the equation.

Want to learn more? Take a deep dive...

Berman, K., & Knight, J. (2009, October 7). The dismal financial IQ of US managers. *Harvard Business Review Blog Network*.

Campbell, D. H. (2011, July 26). Financial literacy is every business's responsibility. *Forbes*.

Mind Tools. (n.d.). *Understanding accounts: Basic finance for non-financial managers*. Mind Tools.

Schulman, N. H. (2013, March). *Use your financial data to make business decisions*. Citibank.

5. **Overwhelmed by data? Select and focus on a few key metrics.** Finance deals with all aspects of the organization—revenues, costs, taxes, losses, profits, market projections, investment analysis. It provides historical data. Forecasts and projections. Accounting for cost control. Analysis to understand customer trends. It deals with macroeconomics and specific quarterly variables. To make wise financial decisions, you need to start with good information. Data to create a credible picture that you can act on. Look for three to five key metrics you can use as the bellwether data point for your planning and decision making. What is the key factor that will drive the situation? What numbers provide a green light or signal caution? Bring the data into context. Is the organization focused on reducing expenses? Expanding service? Supporting growth? Are you concerned about financial outcomes compared to forecasts? Run your numbers past some colleagues—especially in finance—and ask if they agree with your assumptions. Understanding how these numbers promote or hinder future financial performance will allow you to make strong strategic and tactical decisions.
6. **Make spending decisions? Proceed wisely.** Whether you're developing a five-figure project budget or just submitting an expense report, it's easy to lose perspective on the money. You may see yourself in a tug of war to secure resources. You may feel constrained by controls that you don't agree with. Wise spending balances short-term needs with long-term effects. If you're writing a budget, understand the full picture, then drill down into the details. Look for savings in equipment, travel, or staff that can be more wisely spent in another area. Set policies that meet goals while protecting funds. Review expense reports to keep expenditures under control. Review vendor contracts for savings opportunities. Renegotiate whenever you can. Talk to peers about what they are doing to support the business while reining in costs. Talk with your purchasing department about other ideas to reduce costs. Some spending is pure cost and should be eliminated. Some is a necessary price of doing business. Other spending is an investment in morale, learning, or productivity and should be well funded and wisely managed. Build buy-in and compliance by sharing the decision-making process with the team. While certain details of the budget are confidential, the team will benefit from knowing how expenditures are allocated. Share the decisions. Give your team some budget parameters; pass some discretionary power for budgeting and spending down to them. Treat the organization's money as your own.
7. **Need to write a forecast? Look beyond existing data.** Accounting data primarily tells us what has occurred to date. But sometimes you need to leap into the future to make a recommendation. Decisions to invest in products, to add to or cut staff, to buy or divest a business—all require you to make educated guesses about the future. To forecast the future, use grounded processes. Create best-case and worst-case scenarios. Look at three years of data to spot trends that might continue. Look inside and outside the organization—what could alter prevailing trends? Share your assumptions with a few colleagues. Ask them to challenge your thinking. Recognize that there is no crystal ball. Financial projections are developed from solid knowledge of how the business operates and a willingness to identify extraneous factors that may impact the business in the near future. At its best, a forecast is an educated guess about what the future

will hold based on current conditions and sometimes-hazy projections. But it is an essential tool for planning spending, borrowing, and investment decisions.

- 8. Presenting financial information? Tailor your message to the audience.** At any level of the organization, you may be asked to present financial information. This could be part of budget planning, capital purchasing, or reporting on final fiscal results. You need to consider your audience in planning both the content and your approach. First, find a key metric and use consistent messaging. What is most relevant to this group? If you regularly communicate financial results, find key performance metrics that you can use as the bellwether data point for others to cue in on. Second, if the data suggests certain actions need to be taken—such as cutting costs, raising pricing, etc.—let the audience know. Then use the data to support your recommendation. Third, use visuals effectively. Present information in a way that others can see and comprehend quickly. Columns of grey print are a good way to bury information. Great graphics help you tell a story and illuminate trends. Study annual reports and other financials for formats that are easy to use and comprehend. Fourth, be concise. Don't drown the audience or reader—only include what's essential to understanding your message. Put additional data in an appendix for those who want it. Finally, be careful what you share. There can be serious compliance implications for insider data that seeps into the marketplace. Know your audience and make sure that you present only the data that they need in order to hear your message.

Want to learn more? Take a deep dive...

Ashe-Edmunds, S. (n.d.). Budget forecasting techniques. *Chron.*

Black, T. (2010, September 27). 12 Best tools for budgeting. *Inc.*

Hannabarger, C., Buchman, F., & Economy, P. (n.d.). *Presenting financial reports: Turning numbers into information*. For Dummies: A Wiley Brand.

Tjan, A. K. (2009, June 8). The fallacy of financial metrics. *Harvard Business Review Blog Network*.

- 9. Want to improve operations? Understand audit.** While perhaps not the most glamorous of functions, audit serves a valuable purpose in any organization. By auditing the different facets of the operation, important information surfaces—both on what's going right and what needs fixing. Auditing helps organizations to minimize risk. Increase efficiency. Eliminate waste. Save resources. Avoid legal or regulatory trouble. And because they examine operating procedures in a detailed way, they provide an invaluable look at how the organization functions—from the inside out. So if you are new to the organization, or you want to make real improvements that will change the bottom line, or you just want to know more about how things happen, get to know your auditor or audit team. Study the reports they generate. Look for improvements you can make. If any area is of particular concern, consider requesting a special audit. Studies show that when you define the problem, action follows. Good audit information is a spur to decision making and improvement.
- 10. Disappointed by results? Study data to make course corrections.** Organizations start the fiscal year with great intentions. They produce forecasts and annual operating plans. Create budgets to predict and control spending. Build marketing, sales, and staffing plans to drive growth. In a perfect world, results would roll in as predicted. But variances are a reality. Costs exceed budgets. Sales lag expectations. Investments fail to deliver as planned. You may not want to see these numbers, but they highlight areas for improvement. Delve into this information. Get access to monthly and quarterly reports and dig into the data. Where are variances occurring? How serious are they? What are the causes? What is the impact? Sales lagging?

Could be due to a flaw in the pricing or marketing strategy. Costs too high? Could be external market conditions like rising labor rates or unforeseen developments affecting the commodities market. What can you change or control to bring results back in line with projections? One large manufacturer studied how to better predict markets. They discovered that their own six-month leading sales number was the best predictor for economic forecasting. This insight allowed them to make the right staffing and production decisions to meet demand and stay in front of market changes. Get your team together to discuss what is happening. Mine the data for insight. Focus on underlying causes and make corrections.

- 11. Obsessed with meeting goals? See the bigger picture.** Yes, goals are important. You want to realize a return. Build value. Turn in results. But to get the full picture, you need to look beyond the numbers to the bigger picture. Financial results are vital signposts and ways of measuring progress, not the ultimate reason the organization exists. If you are overly focused on hitting a number, you may miss something else important. You could control costs but strangle growth. Maintain a tight budget and miss an investment opportunity. When you're setting a financial goal, ask yourself why it is important. Consider what is at stake and what it will mean if you achieve that goal or fall short. Consider both qualitative and quantitative information about the business. Think long-term as well as short-term. Use financial goals as one measure—but not the only measure—of how you define success.

Want to learn more? Take a deep dive...

Lavinsky, D. (2013, June 12). Numbers you need to know to grow your business. *Entrepreneur*.

Loth, R. (2011, April 1). *12 Things you need to know about financial statements*. Investopedia.

Seach, P. (n.d.). *Learn the basics: Auditing 101*. New York State Society of CPAs.

U.S. Securities and Exchange Commission. (2007, February 5). *Beginners' guide to financial statements*. U.S. Securities and Exchange Commission.

Job Assignments Specific to Your Role

- Create an audit team to examine your operations and present its findings and recommendations to your Board and Staff. Anticipate the questions that are likely to come up and ensure you're equipped to answer them with the appropriate level of detail.
- Attend a meeting of the finance committee of your organization's board and summarize the main issues on the agenda. Ask for input from a member of the committee following the meeting to help clarify anything you're unsure about.
- Lead your team in creating an annual budget, with full justification for key spending decisions. Build a robust business case and be prepared to talk through it.

Additional Job Assignments

- Work with an analyst to create a financial justification for the major purchase of equipment, materials, program, or system for your organization.
- Create an online financial skills training course for new employees. Teaching someone else can be a great way to embed your own learning.

Take time to reflect...

If finance seems like a foreign language to you...

...then find a good translator. Develop an ear for the language of finance. Become familiar with the interplay of figures and metrics. Learn what the numbers are saying and let them guide you.

If you're used to making decisions without considering the bottom line...

...then realize the risks you're taking. Making bold moves without studying the facts and implications is like a doctor treating patients without reading their lab results.

If you think understanding finance doesn't relate to you or your work...

...then start close to home and work outwards. Understanding your own team's contribution first will help you see the data in context. It will make the broader financial landscape more relevant and more interesting.



Learn more about Financial acumen

Berman, K., Case, J., & Knight, J. (2006). *Financial intelligence: A manager's guide to knowing what the numbers really mean*. Boston, MA: Harvard Business School Publishing.

Lambert, R. A. (2012). *Financial literacy for managers: Finance and accounting for better decision-making*. Philadelphia, PA: Wharton Digital Press.

Matias, A. J. (2012). *Budgeting and forecasting: The quick reference handbook*. Cambridge, MA: Matias & Associates.

Taillard, M. (2013). *Corporate finance for dummies*. Hoboken, NJ: John Wiley and Sons.

Wyatt, N. (2012). *The Financial Times essential guide to budgeting and forecasting: How to deliver accurate numbers*. Upper Saddle River, NJ: FT Press.



Deep dive learning resource links

Ashe-Edmunds, S. (n.d.). Budget forecasting techniques. *Chron*. Retrieved from <http://smallbusiness.chron.com/budget-forecasting-techniques-41843.html>

Berman, K., & Knight, J. (2009, October 7). The dismal financial IQ of US managers. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2009/10/us-managers-a-dismal-financial/>

Black, T. (2010, September 27). 12 Best tools for budgeting. *Inc*. Retrieved from <http://www.inc.com/guides/2010/09/12-best-tools-for-budgeting.html>

Campbell, D. H. (2011, July 26). Financial literacy is every business's responsibility. *Forbes*. Retrieved from <http://www.forbes.com/sites/forbesleadershipforum/2011/07/26/financial-literacy-is-every-business-responsibility/>

Hannabarger, C., Buchman, F., & Economy, P. (n.d.). *Presenting financial reports: Turning numbers into information*. For Dummies: A Wiley Brand. Retrieved from <http://www.dummies.com/how-to/content/presenting-financial-reports-turning-numbers-into-.html>

Lavinsky, D. (2013, June 12). Numbers you need to know to grow your business. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/article/226972>

- Loth, R. (2011, April 1). *12 Things you need to know about financial statements*. Investopedia. Retrieved from <http://www.investopedia.com/articles/basics/06/financialreporting.asp>
- Mind Tools. (n.d.). *Understanding accounts: Basic finance for non-financial managers*. Mind Tools. Retrieved from http://www.mindtools.com/pages/article/newCDV_45.htm
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- Tjan, A. K. (2009, June 8). The fallacy of financial metrics. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2009/06/the-fallacy-of-financial-metri/>
- U.S. Securities and Exchange Commission. (2007, February 5). *Beginners' guide to financial statements*. U.S. Securities and Exchange Commission. Retrieved from <http://www.sec.gov/investor/pubs/begfinstmtguide.htm>

Recommended search terms

If you'd like to explore Financial acumen further, try searching online using the following terms:

- Budgeting and forecasting.
- Economic value added.
- Financial auditing.
- Financial literacy.
- Understanding business finance.
- Value added management.

Cultivates Innovation

Creating new and better ways for the organization to be successful.

Organizations need innovation to survive and thrive in the constantly changing competitive landscape. How can they stay ahead of the curve? A first step is to make innovation a priority. To enlist contributors and leaders at all levels to spearhead innovations, large and small. It requires paying attention to what customers want and need—new and improved products, services, solutions, and experiences. It means generating lots of ideas and nurturing the best ones while they're being transformed into something tangible. It means constantly improving operational processes—even replacing them altogether—harnessing the latest research and technology. Innovation also involves rethinking your organization's business model—the value proposition, markets, revenue streams. To be an effective innovator, you need to take initiative and collaborate with people who have diverse points of view. You need to get comfortable taking risks. To experiment and apply what you learned from mistakes and failures. Even if you don't consider yourself to be naturally creative, it can be awakened at any time. Learn about the process of innovation and the tools that support it. Embrace the mindset that you and your organization are never done, never satisfied, never standing still.

“To stay ahead, you must have your next idea waiting in the wings.”

Rosabeth Moss Kanter – American academic and author

Skilled

Comes up with useful ideas that are new, better, or unique.

Introduces new ways of looking at problems.

Can take a creative idea and put it into practice.

Encourages diverse thinking to promote and nurture innovation.

Less skilled

- Stays within comfort zone rather than experimenting with new ways of looking at things.
- Presents ideas that are ordinary, conventional, and from the past.
- Tends to be critical of others' original ideas.
- Has a style that discourages the creative initiatives of others.

Talented

- Moves beyond traditional ways of doing things; pushes past the status quo.
- Continually assesses the market potential of an innovative idea or solution.
- Finds and champions the best creative ideas and actively moves them into implementation.
- Tries multiple, varied approaches to innovative ideas.
- Builds excitement in others to explore creative options.

Overused skill

- Gravitates toward the new and rejects the old.
- Comes up with so many unusual ideas that it overwhelms others.
- Expends too much time and effort looking at creative alternatives instead of taking action.
- Relentlessly pursues change and innovation at the cost of efficiency and reliability.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Cultivates* innovation. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Cautious; risk averse.
- Not open to new ideas.
- Narrow perspective.
- Not market/customer savvy.
- Complacent with what is.
- Lacks knowledge about process.
- Doesn't value innovation.
- Not curious.
- Limited creativity toolbox.
- Slow to change and act.



Brain booster

Creativity and innovation happen when talented people are given the space and freedom to be inventive. Mihály Csíkszentmihályi describes the *flow* state that promotes creative thinking and innovative results. The flow experience happens when individuals are able to concentrate intensely, feel a sense of control, and lose themselves in something they find intrinsically rewarding. This state of mind can produce amazing works of art, music, literature, but also applies in the areas of science and business. In fact, Green Cargo, Patagonia, and Microsoft have all applied flow principles in the workplace with success. Set up a work environment that can function as a playground for ideas. Avoid distractions and obstacles as much as possible. Kathryn Britton, who studied flow at work, finds that “frequent experiences of flow at work lead to higher productivity, innovation, and employee development.”^{28, 29}

Tips to develop *Cultivates* innovation

1. **Wonder what role you can play? Innovation takes a village.** You don't have to be an Idea Generator to bring value to innovation. As Roger von Oech and other experts have pointed out, many roles are necessary. Mix and match based upon project needs, your skills, and motivation. An Explorer seeks out new information, perspectives, and resources. A Leader aligns innovation with strategy and nurtures the climate and process. An Evaluator determines the merits of options and decides which to pursue. A Champion influences others to try it, fund it, or buy in. An Advancer moves the innovation through necessary channels in the internal/external environment. An Implementer executes, putting the idea into practice. A Refiner makes improvements along the way. A Manager tracks the budget, metrics, and risks involved. A

Marketer tells the story and socializes good news. A Knowledge Manager shares lessons learned from successes and mistakes. A Rewarder recognizes those who played a valuable part.

2. **Desire to enhance group creativity? Diversify.** During World War II, it was discovered that teams with the widest diversity of backgrounds produced the most creative solutions to problems. The teams included people who knew absolutely nothing about the area (i.e., an English major working on a costing problem). Current research reinforces these findings. So when attacking problems, pull together the broadest group you can—people from different functions, levels, and backgrounds. Practice “open innovation,” gathering ideas from customers and suppliers. Invite people to act as “provocateurs” to shake up ingrained ways of thinking about the challenge. Gather input through internal or external crowdsourcing, from experts and novices. Go broad when looking for new and different perspectives.
3. **Don’t perceive yourself to be creative? Remove the restraints.** What’s preventing you from contributing to your organization’s innovative efforts? Are you overly cautious? Being creative is about entering the unknown with curiosity and discovering what happens. Do you tend to be a perfectionist? Innovation is not about instantly getting it right—it’s an iterative process that calls for making improvements over time. Are you worried about what people may think? Let it go—innovation requires putting risky and untested ideas up for critique. Do you prefer being practical? Creative ideas may seem impractical or far-flung at first, but with experiments and feedback, you can make them unique *and* workable. You don’t have to change who you are, but you may need to think and act differently when more innovation is required.
4. **Lack a climate conducive to innovation? Take the lead.** Research identifies specific actions that leaders can take to cultivate a climate of innovation: Question the way things have always been done. Establish challenging goals that rally energy and commitment. Explain how projects align with the organization’s strategy. Encourage reasonable risk taking. Recognize and reward creative efforts as well as outcomes. Secure resources for promising ideas (time, space, materials, funding, talent, sponsorship). Steer project teams but don’t micromanage them—freedom and flexibility are crucial for creative work. Buffer people from administrative tasks that prevent them from focusing. Expect mistakes and learn from them. Champion ideas and highlight wins. Promote cross-fertilization of ideas and experimentation on an ongoing basis. Include innovation-oriented developmental assignments to grow the capability of your talent.
5. **Worried about making mistakes? Treat them as stepping stones.** Innovation involves pushing the envelope, taking chances, trying out something untested. Doing these things will inevitably lead to more misfires and mistakes in the short-term but will ultimately yield better results. Assess risks up front and determine how much you’re willing to take. Reduce risks by funding pilots and prototypes to allow for testing without far-reaching consequences. Avoid blame—treat any mistakes or failures as chances to learn. Nothing ventured, nothing gained. American inventor Thomas Edison always viewed failures in the lab as mini-successes. In his view, each time an attempt didn’t work, it got him closer to the solution that would.

Want to learn more? Take a deep dive...

Fries, A. (2010, February 9). Sparking creativity in the workplace. *Psychology Today*.

Linkner, J. (2011, June 16). 7 Steps to a culture of innovation. *Inc.*

Smith Bedford, G. (2013, October 28). 5 Ways to promote creativity in the workplace. *The Business Journals*.

6. **In a rut with business-as-usual? Disrupt “what is” with “what could be.”** Disruptive innovators are known to enter niche markets undetected by organizations complacently going about their business. Before long, the innovation often transforms the industry it has entered. (Think online shopping, personal computers, digital cameras, retail health care clinics.) Disruption brings greater access, simplicity, convenience, and affordability—things customers want. Collaborate with stakeholders and design new and better business models, products/services, and ways of working. Challenge your assumptions. Ask: What business are we currently in? What business should we be in? How can we deliver more for considerably less? How can we make our customers' lives easier? How can we redefine value? What could competitors or start-ups do to make us obsolete? A mantra to adopt is “disrupt or be disrupted.”
7. **Ideas drying up? Capitalize on trends and opportunities.** Innovation isn't just about solving existing problems. It's also about shaping future opportunities. Entering new markets, meeting emerging needs, generating new revenue streams. Pay attention to the latest trends. Do shifts in demographics or technology suggest new opportunities? How about changes in manufacturing capabilities or distribution channels? New regulations (related to food, health, the environment, etc.) may seem like obstacles yet be ripe with opportunity. Study successful entrepreneurs. Where do they invest their energy and money? Become an expert on what's happening in your industry and beyond. What do customers want more or less of? How can you profitably provide it?
8. **Feel too distant from the situation? Engage frontline employees for input.** Creating new or better methods is difficult if you're far from the action. Engage associates closest to the customers, process, or product/service at play. Those with firsthand knowledge and experience. Train them to pay close attention to opportunities for innovation by using what Twyla Tharp calls “forensic intensity.” Supply these frontline investigators with starter questions: How can things be streamlined, easier, more reliable, more energy efficient? What needs aren't being met? What new things can be tried? Have them watch and listen for clues that lead to better solutions and new offerings. Capture and collate their suggestions. Together, evaluate the ideas and try out the best ones. In addition to making things better, you'll boost employee engagement by involving them in initiatives that have an impact.

Want to learn more? Take a deep dive...

Brown, R. (2010, November 29). Is your status quo killing your business? *Entrepreneur*.

Gallo, C. (2012, August 30). Apple's secret employee training manual reinvents customer service in seven ways. *Forbes*.

Rayport, J. F. (2012, April 24). Free your frontline workers to innovate. *Harvard Business Review Blog Network*.

- 9. Need a fresh idea? Immerse yourself and then let go.** To come up with creative ideas on your own, begin by immersing yourself in the challenge. Don't rush it—carve out dedicated time. Explore similarities in other organizations—those in and outside your field. Think out loud with someone who's a good sounding board—many people don't know what they know until they talk it out. Consult with experts and irreverent thinkers. Study the data. Find new patterns and pick out unusual facts that don't quite fit. What's missing? Dig deep to determine root causes. Break up complex issues into smaller parts. Draw pictures or flowcharts to make sense of things. View it from different angles. What would it look like from an economic or political perspective? What's the least likely thing the problem could be? Search for opportunities in what appear to be obstacles. After an extended period of immersion, take a break. Do something relaxing or different—like take a walk, drive, or nap. While you consciously turn off the challenge, your unconscious mind will continue to process it. The best ideas frequently surface during these times of incubation. Be ready to write or sketch it out when it appears.
- 10. Need a structure you can count on? Use tried-and-true methods.** Creativity and innovation don't have to be soft and fuzzy. Inventions don't have to happen by accident or magic. You don't have to be Einstein or Steve Jobs. Try following a deliberate process with extensive research to back it up. Originally developed by Alex Osborn, creative problem solving consists of (1) Identifying the general challenge or wish. (2) Gathering information and insights. (3) Clarifying or redefining the problem once you have useful data. (4) Generating lots of ideas/options. (5) Selecting and strengthening solutions with the greatest potential. (6) Planning for action—tests, implementation, follow-up. Get some training and practice to effectively participate in or lead this process.
- 11. Want creative ideas while brainstorming? Use multiple tools and techniques.** Generate ideas using divergent thinking, which is about being open and exploring possibilities. Strive for three things—fluency (high quantity), flexibility (different categories of ideas), and originality (unique and unusual). Establish classic brainstorming guidelines like deferring judgment and combining and building on ideas. After clearly defining the problem or challenge, generate ideas with the group using techniques such as:

 - Asking a lot of questions: What if? What else? Why not? What if the problem is turned upside down? What if the opposite of our assumptions is true? What if the worst-case scenario occurs?
 - Analogies, forced connections, and parallels. Show images/objects and ask, “How does this picture or object relate to the challenge?” Or “How is the organization similar to what's found in nature (e.g., a river or an oak tree)?”
 - Storytelling, storyboards, or collages. These convey the current or desired customer experience through stories and images.
 - Mind mapping and affinity diagrams. These show how things associated with the challenge are linked or connected in a non-linear way.

- Brainwriting, where individuals write down their ideas in silence and then pass them to each other to stimulate further thoughts.
- Visualizations or guided imagery, which prompt ideas to surface when people are in a relaxed state.

Go online or take courses to build your repertoire. Some groups like to have team members take turns leading activities. Others prefer to engage a neutral facilitator. After you've generated ideas, you'll then shift gears to sort through and evaluate them.

- 12. Ready to select a solution? Evaluate and strengthen options first.** To select the most promising ideas, go into “convergent thinking” or evaluation mode. If you have a large quantity, first do a quick vote to narrow the list. Weigh the remaining options against specific criteria that need to be met (e.g., cost, quality, time to completion, stakeholder satisfaction, appealing design). Discuss the positives, negatives, and interesting features of each remaining option. How can you make the best ideas even stronger? How can you overcome any concerns or mitigate risks? Pay special attention to outliers who voice contrary opinions. Recognize the value their unique perspective brings. Together, plan how you'll test the solution, measure results, and execute on time and within budget. Build in feedback loops with stakeholders to make sure the solution meets or exceeds your targets. Keep track of all data so you can course-correct when needed, replicate wins, and share outcomes with the enterprise.
- 13. Eager to put things to the test? Experiment and learn.** Most innovations aren't created instantly. They're the result of a long road of trial and error, risk taking, mistakes, even accidents. The more you experiment, the more chances you have to discover and improve things. So instead of debating pros and cons endlessly, make ideas more concrete. Share rough concepts or mock-ups with stakeholders and incorporate their feedback in the next iteration. Conduct soft launches or pilots to gather input prior to a full-fledged release. Create idea zones where employees can interact with prototypes and offer suggestions. Or build an in-house innovation lab to continuously experiment with new ideas. Typically, these innovation centers house interdisciplinary teams (designers, engineers, marketers, artists, statisticians). They often have physical sets that simulate day-in-the-life contexts (e.g., a kitchen or office) or kiosks that replicate user experiences (shopping in a retail outlet). Dedicate time and space to quickly vet and make ideas better.
- 14. Not sure innovation is taken seriously? Establish innovation metrics.** Apply the same discipline around innovation initiatives that you would for other business projects. Establish goals and measure your results. A common metric is cumulative profits generated from new products (a variation of ROI—return on innovation). You can also look at return on invested capital (ROIC). But don't limit yourself to financial measures. What is the impact of innovation on customer satisfaction? Employee engagement? Patent applications? Brand reputation? Select the most appropriate metrics and make them visible. Revisit them often, modifying when required.

Want to learn more? Take a deep dive...

Anthony, S. (2013, July 30). Five ways to innovate faster. *Harvard Business Review Blog Network*.

Bass, C. (2012, February 27). TEDxBerkeley – Carl Bass – The new rules of innovation [Video file]. TED.

Liedtka, J. (2012, November 28). How to innovate – without a miracle. *Forbes*.

Job Assignments Specific to Your Role

- Relaunch an existing service or process that's not doing well by gathering input from end users and trying things not tried before.
- Benchmark innovative business models, practices, processes or services that come from both well-known and non-traditional competitors/sources, and report your findings to your board, executive committee and/or team.
- Identify an unmet need and experiment with different ways to fill the gap. Practice seeing failures or mistakes as opportunities to learn by you and your team.

Additional Job Assignments

- Facilitate a brainstorming session—define and clarify the problem/opportunity, generate ideas using various techniques, and narrow the list to solutions you want to strengthen, test, and implement.
- Take part in an entire innovation cycle for a new product/service—from research, design, concept refinement, and prototyping, through to its launch and use in the marketplace.

Take time to reflect...

If you rely on the familiar rather than seeking out the new...

...then consider that breakthrough results often arise from unconventional thinking. Challenge yourself to be creative. Be bold. Have fun. Give yourself permission to try, and maybe fail.

If you're quick to provide most of the ideas yourself...

...then hold back. Discover the fertile minds around you. Unleashing the creative potential will lead to innovation you didn't realize possible.

If you feel a creative approach could never work out...

...then start thinking of what can be possible if it does. Innovation and risk go hand in hand. Be bold. Think "What if?" Ask "Why not?"



Learn more about *Cultivates* innovation

Adair, J. (2009). *Leadership for innovation: How to organize team creativity and harvest ideas*. Philadelphia, PA: Kogan Page Limited.

Afuah, A. (2009). *Strategic innovation: New game strategies for competitive advantage*. New York, NY: Routledge.

Anthony, S. D., Johnson, M. W., Sinfield, J. V., & Altman, E. J. (2008). *The innovator's guide to growth: Putting disruptive innovation to work*. Boston, MA: Harvard Business Review Press.

Gertner, J. (2013). *The idea factory: Bell labs and the great age of American innovation*. New York, NY: Penguin Press.

Teece, D. J. (2009). *Dynamic capabilities and strategic management: Organizing for innovation and growth*. New York, NY: Oxford University Press.



Deep dive learning resource links

Anthony, S. (2013, July 30). Five ways to innovate faster. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/07/how-to-innovate-faster/>

Bass, C. (2012, February 27). TEDxBerkeley – Carl Bass – The new rules of innovation [Video file]. TED. Retrieved from <http://tedxtalks.ted.com/video/TEDxBerkeley-Carl-Bass-The-New>

Brown, R. (2010, November 29). Is your status quo killing your business? *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/article/217581>

Fries, A. (2010, February 9). Sparking creativity in the workplace. *Psychology Today*. Retrieved from <http://www.psychologytoday.com/blog/the-power-daydreaming/201002/sparking-creativity-in-the-workplace>

Gallo, C. (2012, August 30). Apple's secret employee training manual reinvents customer service in seven ways. *Forbes*. Retrieved from <http://www.forbes.com/sites/carminegallo/2012/08/30/apples-secret-employee-training-manual-reinvents-customer-service-in-seven-ways/>

Liedtka, J. (2012, November 28). How to innovate – without a miracle. *Forbes*. Retrieved from <http://www.forbes.com/sites/darden/2012/11/28/how-to-innovate-without-a-miracle/>

Linkner, J. (2011, June 16). 7 Steps to a culture of innovation. *Inc.* Retrieved from <http://www.inc.com/articles/201106/josh-linkner-7-steps-to-a-culture-of-innovation.html>

Rayport, J. F. (2012, April 24). Free your frontline workers to innovate. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/04/unleash-innovation-on-the-fron/>

Smith Bedford, G. (2013, October 28). 5 ways to promote creativity in the workplace. *The Business Journals*. Retrieved from <http://www.bizjournals.com/bizjournals/feature/small-business/tip-of-the-month-creativity.html?page=all>

Recommended search terms

If you'd like to explore *Cultivates* innovation further, try searching online using the following terms:

- Creating a culture of innovation.
- Going against the status quo in business.
- Learning how to innovate.
- Promoting innovation/creativity.
- Rules for innovation.

Builds Networks

Effectively building formal and informal relationship networks inside and outside the organization.

Most organizations have experienced tremendous change since the dawn of the 21st century. Flatter and more matrixed. Virtual teams and offices. Cross-functional ad hoc teams. Global operations. 24/7 connection. Shared services. Centralized and decentralized functions. This is how work gets done now. Decisions are made in teams, with input from multiple functions. Meetings are held on the web, crossing time zones and involving multiple geographies. It's no longer enough to go to work, meet with local colleagues, make a few phone calls, close your door and go home. Connections need to be made with support staff, idea generators, resource managers, and decision makers across the country or around the world. It's not only how work gets done—it's how ideas are spread and careers advanced. This is an exciting world for those who are both open to connecting and focused in forging relationships. But if you are dismayed by ambiguity or shy about reaching out, navigating the network may be a challenge for you. To be successful, you need to know who people are and what they do. How to collaborate, share resources, and maintain productive relationships. You need to be focused yet fluid. Willing to participate and ask for help.

*“Virtue in obscurity is rewarded only in heaven.
To succeed in this world you have to be known to people.”*

Sonia Sotomayor – American Supreme Court Justice

Skilled

- Builds strong formal and informal networks.**
- Maintains relationships across a variety of functions and locations.**
- Draws upon multiple relationships to exchange ideas, resources, and know-how.**

Less skilled

- Builds limited relationships with different groups.
- Has difficulty determining who to contact for resources or knowledge.
- Doesn't tap into networks beyond own immediate area to exchange ideas or get things done.

Talented

- Consults with a wide network of internal and external connections.
- Connects the right people to accomplish goals.
- Works through formal and informal channels to build broad-based relationships and support.

Overused skill

- Relies on networking at the expense of other skills and work priorities.

- May be perceived as a one-sided networker, using networks solely for own advantage.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Builds* networks. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Lacks focus.
- Intimidated by complexity.
- Dislikes or avoids politics.
- Dislikes visibility.
- Lacks ambition.
- Clings to the familiar.
- Prefers linear processes.
- Not open to other ways of doing things.
- Not organized.
- Prefers defined roles and relationships.



Brain booster

Many of us build networks for practical reasons. Our network can serve as a platform for helping us achieve our work goals. It provides a coalition force. An information channel. A source of collective capabilities. But networking is also an end in itself. Our brains are wired to connect with others. We have a fundamental need for social interaction, more so than other physiological needs. Recall when you were rejected by others or isolated at school or in the workplace. Feel painful? Don't be surprised if it does. Our biology is built to require social connections. When we meet this need, we feel good. When we feel good, dopamine is released. Release of dopamine enables us to process thoughts more effectively. It helps us become more productive. Tap into this processing boost by making the most of networking opportunities. Before you meet someone, take a time-out. Close your eyes. Think about that person. What do you know about them? Have you interacted in the past? What is unique or special about them? How are you different from or similar to them? As you think through these points, you activate the regions in the brain (dorsomedial prefrontal cortex and temporal-parietal junction) related to social thinking. This activation prepares you for more productive social interaction. You'll feel good and the chain reaction is stimulated.³¹

Tips to develop *Builds* networks

1. **Not sure where to start? Create a relationship map.** New to the organization? The relationships you establish in the first few months on the job will be a critical factor in your success. If you're just starting to reach out, begin by creating a relationship map. Use an org chart to put names with titles and locations. Who is a good contact in other functions? Who are the major vendor reps or contract plant managers you need to connect with? Start local and then move further afield. Sit down with your boss and colleagues and ask them who you should know. Understand why these people would be good to connect with. Get some insight into how they like to work and what their concerns are. Then create a plan to introduce yourself. Use e-mail or phone to send a short introductory message. Tell them who you are, where you are, and what

you hope to accomplish by working with them. Then plan to meet them face-to-face. The map you create now will become the hub of your productive network.

- 2. Clinging to the familiar? Learn to let go.** Networks are, by their nature, open-ended, changeable, and ambiguous. There is no GPS to tell you which moves to make, or when. They are “navigated” in the way early explorers crossed the Atlantic. With a generally understood destination. A handful of information. A few tools and stars to steer by. Maybe you, on the other hand, like certainty. Routine. Structure. Linear process. Working with people who share your experience. But you will need to loosen up your old ways of doing things if you are going to successfully navigate the network. To become more flexible and accustomed to change, engage in activities that require new ways of thinking. Start small and then move on to bigger challenges. Take a new route to work. Eat lunch in a new locale and talk with new people. Read a book that challenges your thinking. Teach your language to immigrant adults. Plan a trip to a new country with your family. Then go. Design a new way of working and teach it to your team. Changing your approach will help you step into the moving stream of the network.
- 3. Find it difficult to connect? Understand what’s important to other people.** Building a productive relationship is far easier when you understand the world of the other person. The challenges they experience. What their priorities are. Opportunities they see in the near future. And what’s going on for them on a day-to-day basis. So make it your business to dig beneath the surface. Put yourself in their shoes. Learn to talk their language. See life from their point of view. What is life like at their level of the organization? What’s going on in their business unit or function? Recognize that sometimes people have personal or professional challenges that affect their ability to work with you—even if they don’t tell you about them. When you are tapping into your network, anticipate a good response but don’t get discouraged if things don’t happen as you would like. When you understand others’ challenges, you will gain perspective on when and how to reach out to them.
- 4. Not included? Be visible and approachable.** Relationships grow when people like each other, respect each other’s competence, and trust each other to perform as promised. Accomplished networkers get things done because people remember them and want to work with them. You can be knowledgeable and accomplished. But if you are rude, not helpful, too busy to listen, or just not friendly, you’ll be bypassed. Walking around like a curmudgeon? Be someone others want to know and work with. In meetings—smile and put others at ease. Convey openness with phrases like “I don’t think we’ve met” or “I heard you speak this morning and wanted to introduce myself.” Smile when you are speaking on the phone—it will create a more personal connection with the listener. Warm up your e-mails with friendly salutations “Good morning, Joe!” and signatures “Regards”. Wish people a happy weekend or a happy holiday. When they’re facing a personal or professional challenge, say, “Let me know how I can help.” Be sure your e-mail signature includes your title and contact information so they can find you easily. Be enthusiastic. Be personable.
- 5. Going global? Understand cultures—but don’t stereotype.** The larger and more far-flung your organization, the more important effective networking becomes. And the more likely that you will be interacting with people of diverse nationalities located around the world. Virtual teams can include people from many countries. You want to make good contacts and work together in the best way possible. So prepare yourself. And open yourself to learning. If you are traveling, study the regional and national business culture. Learn how business is conducted. How meetings are run. How the culture views relationship vs. task. Formality vs. informality. Punctuality vs. a relaxed time frame. Put yourself in learning mode. Ask someone who has been there. When you work across geographies, you can appreciate differences—but don’t stereotype. Be open and respectful. Get to know people as individuals.

Want to learn more? Take a deep dive...

Debaise, C. (2012, May 3). 7 Tips for networking. *Entrepreneur*.

Fitzgerald, J. (2014, January 12). Fine-tune your networking skills. *The Boston Globe*.

Hauer, C. (2012, June 14). Networking tips: Win friends, influence others [Video file]. *Bloomberg Businessweek*.

- 6. Need help or information? Ask around.** Information is the life's blood of an organization. And information on who can help you get things done is crucial. Need a resource? Work it like a scavenger hunt. Send an e-mail to relevant people or groups. Wondering about best practices in customer service? Need the latest thinking on a new tracking system? Get ideas across the enterprise. Asked to work with colleagues in another country? Find someone who has been there. People love to share their travel tips! Ask personally and send out an e-mail to your contacts to find that key person or piece of missing information. Follow up on whatever comes your way and send a thank you to the person who made the referral. Always be willing to return the favor when requests come your way.
- 7. Forming a team? Know who does what.** If you're tasked with forming a new team or workgroup, let your network help. Start by laying out your idea. Then create a chart of your needs. Treat this like a staffing challenge. What levels of seniority do you need? What kinds of skills or experience? What other criteria are important? Consider functions and geographies. How will you meet? Can you do a face-to-face or will this have to be virtual? Do you know someone who has led similar groups? Ask your peers about people they know and recommend. If you're asking for people from someone else's team, consider whether you should ask permission to "borrow" resources.
- 8. Misplacing information? Use systems to organize.** Ever meet someone helpful and forget their name two days later? Get a business card and wonder why you had it? Promise to follow up and forget to do it? Strong performers spend about 80% of their days in transactions. Making connections. Accomplishing tasks. Getting things done. To stay on top of critical tasks, choose a few systems that work for you and act immediately on new information. Use internal organizational systems, where they exist, to find colleagues. Enter important to-dos on your calendar or other task-tracking system. Store cell phone numbers on your own phone. Move information from business cards into your contact database. When you're out and about, set up next meetings immediately on your smartphone—don't wait until you get back to the office. Scan e-mail. Trash the ones you don't need to respond to. Respond to or file the rest for later action. Find small pockets of time to stay on top of the detail. Take 15 minutes at the end of the day to tie up loose ends.
- 9. Reluctant to reach out to senior management? Ask for support.** It is critical to include more senior management people in your networks. They tend to have a broader range of relationships. After all, they've had more time to meet others, gain influence, and drive decisions. By including higher-level individuals in your network, you will build your own visibility. You will gain a higher-level perspective and important information. And potential support for your initiatives. To network with senior management, you can sometimes reach out to them directly. Especially if you have worked with them in the past or if it is a fairly close relationship on the org chart. Maybe all you need to do is ask an assistant to set up a meeting. If you are more comfortable being introduced, start with people you already know. They will often be happy to broaden your networks, if you ask. Tell them what you'd like to accomplish in your networking and ask for introductions. Outside the organization, send a message through LinkedIn. Or plan to introduce yourself at conference meetings or other events. If you worry about taking up someone's time, remember that the best

leaders like to share their knowledge. They are valuable catalysts for making things happen. Talk with your boss and/or a trusted mentor or legacy leader to start making these important connections.

Want to learn more? Take a deep dive...

Clark, D. (2014, January 9). How networking can become your competitive advantage. *Forbes*.

HBR IdeaCast. (2011, July 21). Getting networking right [Podcast]. *Harvard Business Review Blog Network*.

Misner, I. (2012, September 6). 5 Ways to use your network to grow your business. *Entrepreneur*.

- 10. Hate “politics”?** **Think about it in a new way.** Organizational politics can have a bad name. To some, it denotes hidden agendas, turf battles, and decisions made for the “wrong” reasons. In this view, politics is just another word for conflict. Painful conflict. But to ignore the political give-and-take means giving up influence over decisions. To be part of the political landscape, recognize it for what it is—a web of relationships, opinions, positions, and perspectives. A complex of discussions and agreements that affects everyone in the organization. Including you. It’s to your advantage to observe what’s happening. To understand the perspectives of groups and their leaders. To be aware of others’ concerns and agendas. To participate in discussions. To ask questions. To hold and express an opinion. The most successful networkers are tuned in. They understand how business trends, stock prices, personal opinions, and territorial responses affect decisions. Get your boss’s perspective and consult your peers about what is going on. Read messages from the CEO and the board. By studying others’ positions, you can learn to embrace the political landscape.
- 11. Perceived as too ambitious?** **Network at *all* levels.** Networking inside your organization is not only a great way to get work done, it’s also good for your personal visibility and career. It’s a good idea to be known—especially to those who can help you advance. But if you sense that people think you’re too ambitious, better adjust your approach a bit. You may be too eager to connect with higher-ups and ignoring other important relationships. Remember that the primary intention of building an internal network is to advance the work of the organization. Not to provide you as an individual with opportunities to look good or pursue a promotion. To avoid looking like a “me firster,” reconnect with peers on your immediate team. Set up meetings with your reports. Follow up on anything you need to deliver to your boss. Then refocus your network to include people in your peer groups and colleagues in other functions. Whose name comes up as a great colleague? Whom might you be working with in the near future? And don’t ignore subordinates, assistants, and people who support the projects you work on. They are potentially powerful allies when it’s time to get things done. Treat people at all levels with respect.
- 12. Spread too thin?** **Focus on best relationships.** You may be a natural networker—someone who meets people easily and loves making connections. You’re happy to attend meetings, shake hands, and extend invitations on social media. You may know a lot of people, but in networking, it’s important not to confuse quantity with the quality of your connections. A productive network—whose members can be called upon for information, resources, and referrals—has a focus and a set of shared interests. And a productive network is one you maintain. Whose members you interact with and whose names you recognize. Before you attend another event, set some criteria for making new contacts. Before you accept another social media connection, ask yourself why making this connection can be important to your overall goals and direction. Before you join another LinkedIn group, consider how and when you can interact with its

members. Look for shared interests and the potential for productive interaction. Consider going through your contact lists and deleting anyone whose name you don't recognize.

- 13. Using social networks? Proceed carefully.** Social networks have become a fact of life. They keep us connected to friends and colleagues across time and geographies. But you can also lose your job or derail your career there. There are two ways to think of networking sites: Professional. Personal. Use LinkedIn as a place to maintain a professional profile. Join groups and discussions. Find people in related functions and companies. Connect with former colleagues and new acquaintances. Use the rest primarily as personal sites. And then be careful. Even on a personal site, you represent your organization. Using Twitter? No tweeting opinions on your company, its competitors, products, or policies. No remarks about being bored at work. Or upset with something someone said. Posting photos on Facebook or Instagram? On the Internet, the whole world becomes a very big small town. Take down anything you would have to apologize for—or don't put it up in the first place. Check with HR, Legal, or Communications to get a copy of your organization's social media policy, and follow it scrupulously.

Want to learn more? Take a deep dive...

Dishman, L. (2013, November 22). How the most productive people grow their network while still getting it all done. *Fast Company*.

Ryan, L. (2010, April 7). Ten things that are not networking: Consulting edition. *The Huffington Post*.

Sharma, G. (2013, February 28). How to start networking – and succeed. *Forbes*.

Job Assignments Specific to Your Role

- Interview six people in six different areas (other CEOs of Clubs, of other non-profits and community business leaders) write a summary on what you learned about their perspectives on leading a business. Consider how you will be able to use this information to help build your network. Keep a record of the new relationships you develop at all levels.
- Join several groups, locally and nationally that involves short assignments inside and/or outside your community. Think through the information you will need to gather and set some time lines to get this done.

Additional Job Assignments

- Join or lead a virtual team deploying a new system, process, or procedure across decentralized and/or dispersed units. Note what tools and processes are most effective in helping members of the team connect.
- Create and introduce a system for mapping important relationships for new employees. Test it out with the next few people to join the team.
- Lead a team that creates a multi-functional onboarding or mentoring program involving senior management.

Take time to reflect...

If you feel networking is a lot of effort for little reward...

...then you need to think about it in a different way. Networking is not all about getting an immediate return. It's about expanding your effectiveness by knowing people and being known.

If you tend to be unfocused in your approach...

...then define your purpose. Think quality not quantity. Being clear on what you hope to gain from building your network will help ensure you get what you need.

If you find yourself interacting with the same people again and again...

...then discover pleasant surprises by branching out. Be bold. Step into new territory. Building networks in areas that are far removed from your work—whether different industries or geographies—can be refreshing, enlightening, and rewarding.



Learn more about ***Builds*** networks

- Anklam, P. (2007). *Net work: A practical guide to creating and sustaining networks at work and in the world*. Burlington, MA: Butterworth-Heinemann.
- Baber, A., & Waymon, L. (2007). *Make your contacts count: Networking know-how for business and career success* (2nd ed.). New York, NY: AMACOM.
- Beasley, J. S., & Nilkaew, P. (2012). *Networking essentials* (3rd ed.). Upper Saddle River, NJ: Pearson Education, Inc.
- Bjorseth, L. D. (2009). *Breakthrough networking: Building relationships that last* (3rd ed.). Lisle, IL: Duoforce Enterprises, Inc.
- Zack, D. (2010). *Networking for people who hate networking: A field guide for introverts, the overwhelmed, and the underconnected*. San Francisco, CA: Berrett-Koehler Publishers, Inc.



Deep dive learning resource links

- Clark, D. (2014, January 9). How networking can become your competitive advantage. *Forbes*. Retrieved from <http://www.forbes.com/sites/dorieclark/2014/01/09/how-networking-can-become-your-competitive-advantage/>
- Debaise, C. (2012, May 3). 7 Tips for networking. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/blog/223468>
- Dishman, L. (2013, November 22). How the most productive people grow their network while still getting it all done. *Fast Company*. Retrieved from <http://www.fastcompany.com/3022043/secrets-of-the-most-productive-people/how-the-most-productive-people-grow-their-network-with>
- Fitzgerald, J. (2014, January 12). Fine-tune your networking skills. *The Boston Globe*. Retrieved from <http://www.bostonglobe.com/business/2014/01/12/not-about-networking-about-doing-right/pfqZqjJMBIJSRSEL3Qfp4l/story.html>
- Hauer, C. (2012, June 14). Networking tips: Win friends, influence others [Video file]. *Bloomberg Businessweek*. Retrieved from <http://www.businessweek.com/videos/2013-06-14/networking-tips-win-friends-influence-others>
- HBR IdeaCast. (2011, July 21). Getting networking right [Podcast]. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/07/getting-networking-right/>
- Misner, I. (2012, September 6). 5 Ways to use your network to grow your business. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/article/224344>

Ryan, L. (2010, April 7). Ten things that are not networking: Consulting edition. *The Huffington Post*. Retrieved from http://www.huffingtonpost.com/liz-ryan/ten-things-that-are-not-n_b_528019.html

Sharma, G. (2013, February 28). How to start networking – and succeed. *Forbes*. Retrieved from <http://www.forbes.com/sites/gaurisharma/2013/02/28/a-force-to-be-networked-with/>

Recommended search terms

If you'd like to explore *Builds* networks further, try searching online using the following terms:

- Getting your employees to network.
- How to start networking.
- Leveraging networks.
- Networking.
- What not to do while networking.

Plans and Aligns

Planning and prioritizing work to meet commitments aligned with organizational goals.

Nothing helps move things along better than a good plan. And a clear marker of a good plan is one that is aligned with strategic priorities. Plans lay a foundation. Aligned plans enable you, your team, and the entire organization to move in the right direction. Plans help people get organized and remain focused. They lead to better use of resources. Reduce scrambling. Help people anticipate problems. And prompt them to proceed with more confidence. This is particularly important given the rapid change and uncertainty prevalent in organizational life. Bob Johansen of the Institute for the Future describes the importance of providing clarity as a smart way to address chaos and confusion. Plans do just that. Instead of jumping into action, use the planning process to deliberate on what you're trying to accomplish. Line up your plans and projects so they are in sync with strategic organizational priorities. Collaborate with others to develop robust, flexible plans to guide you where you want to go.

“The end we aim at must be known before the way can be made.”

Jean Paul – German writer

Skilled

- Sets objectives to align with broader organizational goals.**
- Breaks down objectives into appropriate initiatives and actions.**
- Stages activities with relevant milestones and schedules.**
- Anticipates and adjusts effective contingency plans.**

Less skilled

- Gets caught up in immediate needs without attending to larger priorities.
- Spends time and resources without a clear purpose.
- Gets caught off guard by problems due to the lack of contingency plans.
- Haphazardly tracks progress or performance.

Talented

- Focuses on highest priorities and sets aside less critical tasks.
- Lays out a thorough schedule and steps for achieving objectives.
- Makes implementation plans that allocate resources precisely.
- Looks for obstacles and develops excellent contingency plans.
- Uses milestones to diligently track and manage the progress of the work.

Overused skill

- Is so focused on completing only mission-critical tasks that he/she lets the trivial many accumulate into a critical problem.
- Persistently follows plans, allowing little room for change.
- May leave out the human element of the work.
- Spends an inordinate amount of time planning for unlikely obstacles or roadblocks.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Plans and aligns. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Doesn't think ahead.
- Short-term focus.
- Lacks structure; disorganized.
- Avoids communication.
- Impatient.
- Oversimplifies.
- Poor time management.
- Not detail oriented.

Did you know?

In a 2011 survey of 1,500 executives conducted globally, McKinsey & Company found that only 9% of those surveyed were “very satisfied” with how they allocated time. One-third of the respondents were “actively dissatisfied.” The survey also explored the degree to which these executives were strategically aligned in terms of the use of their time. Only 52% said the way they spent their time largely matched the strategic priorities of their organization. With nearly half admitting they were not focusing sufficiently on guiding the strategic direction of the business, this shows that the time challenges experienced by executives not only affect them as individuals, but is also likely to impact the well-being of the company.⁴⁰

Tips to develop Plans and aligns

- 1. Planning without clarity? Define overall goals and objectives.** Before developing a plan, take time to understand its purpose. What exactly needs to be accomplished and why? Is there a problem that needs to be solved? An initiative that needs to be organized? An effort that needs to be managed? Who has identified the need? What's the context? What's at stake? Who will benefit from a successful outcome? What will success look like according to key customers and stakeholders? What criteria will be used to measure success? Defining clear goals and objectives from the beginning is critical to plan effectively and deliver the desired results. The more specific you are, the less disagreement there will be about whether you have achieved your objectives.
- 2. Don't know what to include? Lay out the work and tasks.** Most successful projects begin with a good plan. Once you've identified the objectives, outline the scope, desired outcomes, and key measures. What skills are needed to accomplish the goals? Who should be on the team? What additional resources are

required? Then create a schedule using the appropriate level of detail for the project team, sponsors, and stakeholders. A high-level overview typically includes phases, milestones, and key deliverables set to a time line. A detailed plan adds all the steps from A to Z. Take special care outlining these steps—many people are perceived as lacking planning skills because they leave important things out. Consider starting at the end or from a deadline, working backward from Z to A when mapping out the steps. Laying out tasks in reverse order can help you develop a realistic schedule. Ask others for feedback on the plans and incorporate their input.

3. **Want more structure? Use planning tools and software.** Become an expert on frameworks and tools to create flowcharts, visualize plans, and monitor progress. A Work Breakdown Structure (WBS) prompts you to subdivide activities into the smallest possible task. For each task, ask, “What has to be done in order to accomplish this?” until nothing else can be subdivided. Estimate the duration and resources needed for each task. A Critical Path diagram shows all essential activities needed to complete the project, plus the total time it will take. The activities should be in the right order. Some must be sequential—they depend on others being completed first. Other activities can happen concurrently or in parallel. There are two other widely used flowcharting tools that show time lines, sequences, and dependencies. Gantt charts are a bar-type visual for smaller projects. A PERT diagram is used for more complex projects, often as a monitoring tool. Share the output of the various tools with others so everyone stays up-to-date and can see when a plan is off track. Select software that meets your needs but isn’t too difficult to learn. Find someone to train you and to share frequently used templates so you don’t have to reinvent the wheel.
4. **Limited resources? Obtain and manage resources wisely.** Nothing stalls the execution of a plan like lack of resources. Think through what you’ll need for each phase and activity of your plan. People, funding, tools, technology, space, materials. Which resources can you obtain easily and control on your own? Which do you need to locate, negotiate for, or get help securing? Present a clear rationale to decision makers. Outline the difference these resources will make toward effectively meeting your objectives. How will they impact results? Completion time? Budget? What short- and long-term implications exist? How will other areas of the enterprise be impacted? Explain how you’ll allocate the resources efficiently and avoid waste. Describe the risks of not obtaining needed resources. Get creative and be willing to bargain for needed resources. What can you trade with other groups? What can you share? Discuss viable options along with their associated costs/benefits.

Want to learn more? Take a deep dive...

For Dummies. (n.d.). *How to create a work breakdown structure*. For Dummies: A Wiley Brand.

Larson, E., & Larson, R. (2004, September 10). How to create a clear project plan. *CIO Magazine*.

Mind Tools. (n.d.). *Locke’s goal setting theory: Understanding SMART goal setting*. Mind Tools.

Stolovitsky, N. (2012, October 19). *Top 10 tips for effective resource management whether jumping from space or not*. Genius Project.

5. **Unsure how things fit with the big picture? Align your objectives.** It’s common sense to align objectives with broader organizational goals. Unfortunately, it’s not always common practice. Connecting the strategic dots helps create a common mindset. Reduces confusion. Increases efficiency of effort. Each individual’s goals should align with and support the team’s objectives. Each team should have goals that align with and support the department’s objectives. And so forth on up. Once alignment is clear, you’ll have a better sense of what to prioritize in your daily work. With goals as the guide, separate potential actions into four areas:

mission critical, important to get done, nice to do if time is left over, and unrelated to the organization's main goals. When choosing what to do, apply the scale and always choose the highest level. Plan and execute what matters most.

6. **Operate in a silo? Engage in collaborative planning.** Research has found that one of the best ways to gain commitment is to ask people for their ideas—especially when the work is first taking shape. Consult with others from the beginning to build support for the project. Meet with those who will be implementing the plan. Share the overall intent so they understand the context. Work together to map things out and then ask them to review your drafts. Is the sequencing correct? Are the right people involved? Can they commit to this schedule? What gaps exist? Gather their input about the many moving parts. How will outputs from one group relate to the work of other units? Where can you consolidate or streamline tasks to save time and accomplish more? What risks should be addressed? Make sure all team members understand and agree to the plan. Also seek advice from those who have planned or worked on similar projects. What did they learn that could be applied to the current project? Always remember that what you do is part of a broader strategy and interconnected system.
7. **Keeping others in the dark? Communicate plans with stakeholders.** The cooperation and engagement of stakeholders will be crucial to achieving your plan's objectives. Identify your key stakeholders. What are their interests and needs? How much information do they want? What vehicles of communication do they prefer? At what frequency? Develop and follow a communication plan to stay in touch with them. Communicate the overall aims, approach, and time line of your project. Include meaningful milestones, such as when you need their input on decisions or for approvals. Let stakeholders know what's progressing according to plan and what is not. If you anticipate problems or delays, inform those who will be affected as soon as possible and determine workable solutions.

Want to learn more? Take a deep dive...

Harding, C. (2010, January 14). *Project status reporting process*. Project Management Online.

Lavoie, A. (n.d.). *Ignoring this issue could ruin your company*. CEO.

Mekšs, D. (2012). *30 Greatest online project management and collaboration tools for easy communication!* 1st Web Designer.

Merrett, R. (2012, July 31). *Want project success? Engage stakeholders*. *CIO Magazine*.

8. **Not tracking details closely enough? Monitor progress against the plan.** If a leader or stakeholder asks an important question related to the status of your project, could you respond quickly and accurately? Could you estimate time to completion? Provide a budget update? At the outset of the project, develop a system for tracking time lines and measures that are meaningful to team members and stakeholders—cost and quality control, scheduling variances, scope changes, resource usage. When in doubt, return to your objectives. What are you trying to do? Review success criteria regularly—have a dashboard of these metrics within easy reach. Periodically distribute executive summaries to all parties. Supplement the summaries with additional information relevant for specific groups. Give everyone involved in implementing the plan progress reports. When you reach milestones, share updates related to achievements, decisions, potential risks, and next steps.
9. **Not anticipating potential roadblocks? Envision the plan in process.** Take time to picture what could go wrong from the start of the plan to its completion. Discuss potential scenarios with colleagues who have

diverse vantage points. How might things play out? What's the worst-case scenario? What other setbacks or glitches might occur? Rank the potential problems from highest likelihood to lowest likelihood. What will you do if the highest likelihood things happen? Create contingency plans for each. Take steps to prevent problems and monitor warning signs. Pay close attention to the weakest links. These are usually groups or elements you have the least interface with or control over (perhaps someone in a remote location, a consultant or supplier). Stay doubly in touch with the potential weak links. Things can change quickly, so at various milestones, go back through your mental checklist. Anticipate and have Plan B ready.

- 10. Overly optimistic when developing plans? Plan for the unplanned.** Many use “best-case scenario” formulas when making initial plans. They're eager to please the customer. To deliver top-quality results quickly and affordably. Stretch goals are admirable. But overpromising isn't practical or smart—it can lead to execution problems and fallout from unmet expectations. It can also make the planner seem naive. Strive to make your plans realistic. Get input from others experienced with similar projects. Take into account challenges that are likely to crop up. When dealing with unknowns, give yourself time to become familiar with the territory. There are human and unforeseen aspects related to every plan. Anticipate challenges without letting them overwhelm you. Adapt the plan in light of new insights.
- 11. Prefer plans to stay the same? Be ready to adapt and act.** Are you naturally wired to want to finalize plans and move on? Think revisiting plans is a waste of time? Given how frequently plans are launched in dynamic and unpredictable environments, changes should be expected. Even welcomed. Change can mean that people are paying close attention to evolving information. It can signal that they're discovering new opportunities for innovation. If you or your organization values innovation and entrepreneurial zeal, you may want to reassess how you approach planning. An overemphasis on plans can slow things down. Research conducted by Saras Sarasvathy at the Darden School of Business indicates that many entrepreneurs begin with action rather than planning. They take “smart steps,” evaluate what is learned, then build on it to pursue their goals. Traditional organizations often fear that a lack of planning will increase risk. The entrepreneurs studied believe that risk is actually reduced, given the real-world data they obtain during a series of quick, inexpensive steps.
- 12. Changes getting out of hand? Beware of scope creep.** An important aspect of planning is managing scope. Scope creep occurs when stakeholders' expectations have expanded, but the changes have not been vetted and time lines and resources have not been adjusted to accommodate. It could stem from customer requests, unforeseen complications, cost overruns, resource constraints, scheduling adjustments. Whatever the case, scope creep results in additional work. If not identified and managed properly, the plan could get behind schedule, run over budget, or not meet agreed-upon objectives. Guard against pressure to deliver more than was originally planned without going through a proper revision process. Establish standard change procedures and make sure people are aware of them. Typically, this includes a change request form that states the reasons, costs, and sign-offs needed by project leads and sponsors. Change is inevitable—be ready to manage it.

Want to learn more? Take a deep dive...

Knight, J., Thomas, R., & Angus, B. (2013, June 4). Battle scope creep in your projects. *Harvard Business Review Blog Network*.

Mochari, I. (2014, January 15). 3 Risks of not tracking your progress. *Inc.*

Pitagorsky, G. (2011, January 26). Project managers are change managers. *Project Times*.

Stolovitsky, N. (2010, August 4). *Planning for the unplanned: Including risk in your project management strategy*. Genius Project.

Job Assignments Specific to Your Role

- Lead a strategic alignment initiative to ensure your team/organization goals and plans are integrated with those from other areas in your clubs, and that all are aligned with broader organizational priorities.
- Take on a project or assignment that requires collaborative planning with colleagues from various disciplines and areas of expertise.
- Plan the implementation and integration of a new process or system (e.g., IT, HR, finance, membership tracking), making sure stakeholders remain engaged and updated throughout the process.

Additional Job Assignments

- Plan an off-site meeting, conference, convention, or trade show where you'll need to closely monitor the time line leading up to the event.
- Plan the renovation of an office, floor, building, service center, lab, warehouse, etc., that requires you to carefully manage scope and resources.

Take time to reflect...

If you'd rather improvise than take the time to come up with a plan...

...then consider that there are many destinations you'll never reach without a map. A strong plan allows you to take well-considered steps in new territory. Avoid hazards. Arrive sooner.

If you're spontaneous by nature...

...then recognize the potential pitfalls of doing things without the benefit of forethought. Aligning resources, ideas, and goals requires anticipation and planning. It doesn't happen by accident.

If you're easily unsettled when things go off track...

...then acknowledge that sometimes plans go awry. Obstacles are inevitable, so staying open to a shift in route is pragmatic and realistic. Detours can turn out to be the best part of any trip.



Learn more about Plans and aligns

Chermack, T. J. (2011). *Scenario planning in organizations: How to create, use and assess scenarios*. San Francisco, CA: Berrett-Koehler Publishers.

Kerzner, H. (2005). *Project management: A systems approach to planning, scheduling, and controlling* (9th ed.). Hoboken, NJ: John Wiley & Sons.

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Ogilvy, J. A. (2002). *Creating better futures: Scenario planning as a tool for a better tomorrow*. New York, NY: Oxford University Press, Inc.



Deep dive learning resource links

For Dummies. (n.d.). *How to create a work breakdown structure*. For Dummies: A Wiley Brand. Retrieved from <http://www.dummies.com/how-to/content/how-to-create-a-work-breakdown-structure.html>

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Knight, J., Thomas, R., & Angus, B. (2013, June 4). Battle scope creep in your projects. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/06/battling-scope-creep-in-your-p/>

Larson, E., & Larson, R. (2004, September 10). How to create a clear project plan. *CIO Magazine*. Retrieved from http://www.cio.com.au/article/166486/how_create_clear_project_plan/

Lavoie, A. (n.d.). *Ignoring this issue could ruin your company*. CEO. Retrieved from http://www.ceo.com/leadership_and_management/ignoring-this-issue-could-ruin-your-company/

Mekšs, D. (2012). *30 Greatest online project management and collaboration tools for easy communication!* 1st Web Designer. Retrieved from <http://www.1stwebdesigner.com/design/project-management-collaboration-tools/>

Merrett, R. (2012, July 31). Want project success? Engage stakeholders. *CIO Magazine*. Retrieved from http://www.cio.com.au/article/432205/want_project_success_engage_stakeholders/

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Pitagorsky, G. (2011, January 26). Project managers are change managers. *Project Times*. Retrieved from <http://www.projecttimes.com/george-pitagorsky/project-managers-are-change-managers.html>

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Stolovitsky, N. (2012, October 19). *Top 10 tips for effective resource management whether jumping from space or not*. Genius Project. Retrieved from <http://www.geniusproject.com/blog/famous-projects/top-10-tips-for-effective-resource-management-when-jumping-from-space/>

Recommended search terms

If you'd like to explore Plans and Aligns further, try searching online using the following terms:

- Effectively managing resources.
- Project planning.
- Regular status reporting in project management.
- Setting clear goals.
- Tracking project progress and change.

Being Resilient

Rebounding from setbacks and adversity when facing difficult situations.

Setbacks are often unavoidable. Potential pitfalls are everywhere, especially in today's demanding, adverse, and often volatile working environment. Even the most resilient people experience setbacks. The difference is they anticipate them. Meet them head-on. Have the ability to withstand them. They use their resilience to stay in control. To keep positive and believe there is a way forward, even when it can't be seen. They recover quickly, learn, and move forward. But resilience doesn't come easy. It requires courage and commitment. But without it, stress can rise to unmanageable levels. Performance can fall away. You can burn out. The more resilient you become, the more you'll stay calm under pressure and positively adapt to difficult situations. You'll keep going when you feel like giving up. You'll bounce back to baseline levels of performance, confidence, and satisfaction sooner. Not only that, you'll be better equipped to confront the next challenge that arises. You'll be stronger.

*“Do not judge me by my successes,
judge me by how many times I fell down
and got back up again.”*

Nelson Mandela

South African anti-apartheid revolutionary, politician, and former president of South Africa

Skilled

Is confident under pressure.

Handles and manages crises effectively.

Maintains a positive attitude despite adversity.

Bounces back from setbacks.

Grows from hardships and negative experiences.

Less skilled

- Gets easily rattled in high-pressure situations.
- Exhibits low energy and motivation during times of stress and worry.
- Acts defensively when faced with criticism or roadblocks.
- Takes too long to recover from setbacks.

Talented

- Stays focused and composed in stressful situations.
- Maintains a positive attitude and forward-thinking approach despite troubling circumstances or setbacks.
- Takes constructive action to navigate difficulties or obstacles.
- Is viewed as a source of confidence in high-stress situations.

Overused skill

- Is unreasonably confident and optimistic; could miss the early signs of trouble.
- Fails to show emotion in appropriate circumstances; comes across as cold and uncaring.
- May allow stress to pile up, risking burnout.
- Minimizes the implications or severity of the situation.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Being* resilient. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Doesn't push hard enough.
- Withdraws when faced with resistance.
- Gives up too soon.
- Lacks composure.
- Takes things personally.
- Won't take charge.
- Lacks belief and passion.
- Freezes when situations change quickly.
- Uncomfortable with rejection.
- Lacks physical/mental fitness.



Brain booster

Losing composure is often an instantaneous reaction that we have not “filtered” through our rational brain. In fact, it's the brain's limbic system that drives the increased heartbeat, flushed face, sweaty palms, and the flash of emotion that accompany a loss of composure. The limbic system is one of the most primitive areas of the brain and it's designed to detect threats of all kinds. A perceived lack of fairness, lack of certainty, or lack of respect are all modern-day threats that our limbic system is attuned to. Once your brain detects a threat and your amygdala (emotional response center) is activated, the prefrontal cortex (PFC), which is responsible for rational thinking, is impaired. In this frame of mind, you are more likely to miss details, draw incorrect conclusions, and make rash moves in an effort to regain control and obliterate the threat. That could be detrimental to your relationships and reputation. The next time you start to “lose it,” pause. Take some slow, deep breaths. This reduces the stress reactions. Notice what is upsetting you. Ask yourself why you feel threatened. Put it in context so it doesn't seem overwhelming. Tell yourself that it's time to be constructive. Talk your limbic system off the ledge so you can get back to using your PFC.

Tips to develop *Being* resilient

1. **Meeting resistance? Push through it.** Hesitate in the face of resistance? Do you backpedal? Give in too soon? Remember, resistance is normal, not abnormal. Some of the time it's legitimate; most of the time it's just human nature. An unconscious defense mechanism. People resist until they understand. They are just protecting territory. Don't take it personally. Remind yourself what you are there to do. Return to the facts and your agenda. Keep making the business case. Invite the resisters in. Find out what's causing them to behave that way. Maybe your audience isn't ready to do what you need; it's not on their agenda. Help them

understand what's in it for them. Invite their ideas, input, and critique. Listen. Adjust if you need to. Push ahead again.

2. **Lose confidence when challenged? Prepare to present a strong case.** Question your ability at the first sign of a challenge? Tell yourself that others are better, smarter than you? That this is never going to work? That your performance won't be good enough and that you are bound to fail? Confidence comes from having absolute belief in what you stand for. Being secure in yourself that you're on the right track. Being determined that this thing must get done. Feeling good about it. Do you feel good about yourself? Can you confidently defend to a critical and impartial audience the wisdom of what you're doing? Work on presenting your case. Practice mental interrogation until you can clearly state in a few sentences what you stand for. Use definite, direct language. People don't line up behind laundry lists or ambiguous objectives. Don't make what you're doing sound like a trial balloon. Don't be vague or tentative. Use the business case to support what you are asking for and to explain how everybody can gain. Do your homework. Anticipate tough questions, attacks, and countering views. Expect pushback. Rehearse how you will respond. Practice your style, tone, pace, and volume. Plan as if you're only going to have one shot.
3. **Giving up after one or two tries? Try something different.** If you find yourself stuck in a repeating groove that's not working, it's time to switch approaches. To do something different. After all, if you always do what you've always done, you'll always get what you've always got. Don't give up. Identify what's getting in the way. If you think you might be missing something, take a step back. Look at the situation from a range of perspectives: yours, theirs, and that of an objective observer. Think about multiple ways to get the same outcome. Use the insights you gain to give yourself some advice about what to do differently. For example, to push a decision through, you could meet with stakeholders first, go to a single key stakeholder, study and present the problem to a group, call a problem-solving session, or call in an outside expert. Be prepared to do them all when obstacles arise. Persevere. Go back a second, third, or fourth time if you have to.
4. **Path blocked at every turn? Learn to navigate the maze.** Organizations can be complex mazes. Full of obstacles, with many turns and dead ends. Even worse, organizations are staffed with people, which makes it more complex. Egos. Gatekeepers. Resisters. The best path to get something done may not be direct. The formal organization works only some of the time. Most of the time, the informal organization runs the show. To overcome obstacles and drive things through, you have to know how to work the maze. Be prepared to tread new paths. Learn the informal organization. Identify the key players, especially the gatekeepers and the traffic controllers. Maybe the best way to approach someone is through someone else. Maybe you have to work on your timing. Be patient with process. Things sometimes take time. People need to be ready to move. When is the best time to approach someone for a decision or an action? Ask others the best way to get things done in this organization. Watch others. What path do they follow?

Want to learn more? Take a deep dive...

Hannon, K. (2012, December 26). 6 Key steps for career resilience. *Forbes*.

Ireland, K. (2013, August 16). *How to show self-confidence tips & tricks*. Livestrong.

Wakeman, C. (2009, June 8). A guide to dealing with resistant employees. *Fast Company*.

5. **React defensively when criticized? Respond constructively instead.** There will always be people who are quick to criticize. To point out what you've done wrong. Tell you how something should be done differently. Sometimes it's well intended; sometimes it isn't. But, as Aristotle once said, the only way to avoid criticism is "...by saying nothing, doing nothing, and being nothing." Resist your natural impulse to

react defensively. This is rarely a wise or productive move. It's emotionally driven and likely to make your critic feel attacked. It could escalate into conflict. Learn to respond instead by staying calm and pausing. Listen to and think about what you're hearing. Treat it as information, even if you don't agree with it or feel hurt. Accept you have flaws and that sometimes it's helpful to have these pointed out to you. Be open to the fact that others may be right. Pay attention to any quality feedback that is being given. Focus on what you can learn. Apply constructive thinking. If the criticism feels unjust, ask your critic to repeat their viewpoint. Listen carefully. You may spot that it's based on a misunderstanding or different perspective. Work with them to straighten things out. When you choose your response, you are taking control of the situation and of your emotions. You'll make better choices about what you do with the information.

- 6. Trying to do too much? Regain your balance.** Being pulled in multiple directions? Managing conflicting demands? Lost your sense of priority? Trying to make everyone happy? Stop. You can't please all of the people all of the time. You can't fight every battle and hope to be effective. You only have a finite amount of energy and quality thinking time each day, so you need to balance it across the things that matter. Focus your effort on driving through the priorities. Not sure what they are? Establish them. Find out. Agree on them with your boss/stakeholders where you need to. Write them down. Use them to stay focused. Priorities act like a guiding compass when you're faced with managing conflicting demands. They help you maintain perspective in terms of what must be done. Be sure your priorities are right.
- 7. No energy? Get fit and healthy.** You need energy to be resilient. Physical and mental energy feed off of each other. Work on your physical fitness. Join a health club, walk, exercise, and eat well. Look after your mental well-being. Regularly engage in activities that you find mentally restorative. Develop a habit for a physical activity you enjoy and that makes you feel good. Practice yoga, mindfulness, or meditation techniques. Scientific studies show doing things that "center" you can give your mind greater clarity. Renewed thinking. If you're physically and mentally fit and healthy, you'll have more energy. It'll feel easier to attack and finish projects. Easier to stay focused and positive. To persevere when you feel like giving up. You'll perform better, feel stronger.
- 8. Blow up under pressure? Regulate your internal pressure gauge.** Demanding role? Challenging projects? Tough environment? Pressure building? Resilience being tested? Find ways to stay in control. Pressure can be productive if regulated effectively—just like a pressure cooker. Not enough pressure, the meal won't cook. Too much and the lid will blow. Contents all over—a chaotic mess. Try to understand what causes you to blow up. Maybe your fuse is too long. You wait and wait. You keep concerns to yourself. Let the pressure build to the point where you're unable to control its release, so you blow up. Maybe it's too short and you don't see the signs in time. Either way, uncontrolled pressure release is likely to have negative implications, for you and those around you. Regulate your internal pressure gauge. Learn how much pressure you need to be productive. Recognize the signals that the pressure's getting too high. That you need to let off some steam. Maybe you're faltering? Losing your confidence? Your composure? Agitating others? Find constructive ways to release the pent-up energy and emotion. Work on releasing your work frustration off-work. Get a physical hobby. Physical activity helps relieve pent-up energy. Detaches you from daily pressures. It also bumps up the production of endorphins, your brain's feel-good neurotransmitters. These help combat the negative effects of stress. Try writing down what you're concerned about. Talk about it with confidantes and trusted coworkers. Take action as soon as you feel your pressure gauge rising. The sooner you can dissipate the unhelpful energy, the sooner you will bounce back to your baseline levels of composure and performance.
- 9. Burning out? Learn to manage stress.** Physically and emotionally exhausted? Dread going to work? Trouble sleeping? Exhausted all the time? No interest in your work? Feeling overwhelmed? Getting short-

tempered? These could be warning signs that your stress levels are too high and that you could be heading towards burnout. Stress can be caused by anything. Your daily commute. Heavy workload. Difficult customers. Delivering results quarter after quarter. It's different for everyone. Unchecked, it can affect your productivity and, worse still, your health. Find out what situations cause you to become stressed. Keep a stress diary. Make an entry after any stressful event. Note down when it happened. How you felt about it. How high your stress level became on a scale of 0–10. How you responded. How your response helped or hindered the situation. Any physical or emotional reaction (sweaty palms, tears, etc.). Review your diary entries regularly and establish what situations cause you the most stress. How do they affect your productivity? Your health? What can you do to change these situations for the better? What strategies will help you deal with them? Some stress at work will be unavoidable and resilience means recognizing and responding to your signals early. Finding better ways to manage stress and pressure. Talk to your boss or mentor about getting some relief if you're about to crumble. If you feel you're already burned out, maybe think about moving to a less stressful job.

Want to learn more? Take a deep dive...

Collingwood, J. (2010). *Dealing with anger constructively*. Psych Central.

Goudreau, J. (2013, March 20). 12 Ways to eliminate stress at work. *Forbes*.

Mayo Clinic Staff. (2013). *Coping with stress: Workplace tips*. Mayo Clinic.

- 10. Lost your passion? Rediscover what matters.** Heart's not in it anymore? Hard to stay positive? Not 100% committed? Maybe you don't bounce back or drive to overcome difficulties because deep down you don't care anymore—you're sick of doing this job or working for this organization or pushing against a particular person or group. Ask what it is that you want. Find your passion again. To make the best of your current job, make a list of what you like and don't like to do. Concentrate on doing more liked activities each day. Work to delegate or task trade the things that are no longer motivating to you. Do your least preferred activities first to get them out of the way; focus not on the activity, but on your sense of accomplishment. Change your work activity to mirror your interests as much as you can. Volunteer for task forces and projects that would be motivating for you.
- 11. Caught off guard by crises? Prepare for them.** Resilience is a key skill for crisis management. When a crisis strikes, you need to keep a firm, confident hand on the tiller. During a crisis, time is the enemy. Pressure is high and quick action is needed. So be prepared for them. Learn to anticipate them. Come up with signal detectors—such as an increase in costs or threats—for all potential crises. Collect all the data you can. Think through all of the worst-case consequences and assign a person or a team to prepare for them. When a crisis strikes, use the data you have and ask others for suggestions and thoughts. Decide and execute decisions with an instant feedback loop. Make adjustments to your course as you go. Stay focused and in control. And communicate, communicate, communicate.
- 12. Suffered a setback? Take positive action.** Setbacks can happen at any time and are caused by many things. Environmental factors. Or individual mistakes. Whatever the cause, it can be easy to be thrown off track and harder to bounce back. Maybe you're embarrassed? Perhaps you feel you've failed, lost the battle. Recognize what has happened and accept your own role in the situation. Bring yourself to a physical and emotional state where you can focus on moving forward. Confront the issue. Plan your recovery. Ask yourself: What do I want to have happen? What is within my control? What do I have influence over? How can I make the most immediate, positive difference in this situation? What's the best and worst outcome

from here? What do I want success to look like on the other side of this setback? How can I get there quickly? What will I do first? Don't retreat into isolation. Surround yourself with wise counsel—people who will help you stay balanced. Challenge your perspective. Guide you through making the tough decisions. Encourage you to keep going; to recover quickly. Resilience is about taking action. A positive step forward, a small win, a new goal that takes attention off of the past and creates excitement about the future. A belief that you will succeed eventually.

Want to learn more? Take a deep dive...

Kleiman, J. (2013, January 28). 7 Ways to bounce back from career mistakes, missteps, and misunderstandings. *Forbes*.

Levin, H. (2012, May 3). *How to stay motivated at work*. Fox Business.

Ryan, J. R. (2010, June 11). Four ideas for a positive workforce. *Bloomberg Businessweek*.

Job Assignments Specific to Your Role

- Take on a task or assignment that you dislike doing. Manage your own resistance to driving it through.
- Solicit constructive criticism from a customer, board member or key stakeholder that you've had trouble with or find it hard to get along with. Look for what you can learn from the information you receive.
- Develop and implement your own personal stress- and pressure-management plan. Seek input from mentors and coaches who can help guide you.

Additional Job Assignments

- Prepare and present, with confidence, a significant proposal to your management team. Anticipate the resistance you may get and prepare to counter it.
- Offer to take the lead on getting a derailed project back on track. Dig beneath the surface to find out what went wrong so you can work out how things need to be approached differently.

Take time to reflect...

If you feel like giving up when people push back...

...then ask yourself if you tend to give up too soon. Don't be discouraged by resistance. If your goal is worthwhile, you owe it to yourself to persist.

If you find it hard to stay focused when the pressure is on...

...then find your release valve to reduce your stress levels. Keep things in perspective. Talk to trusted friends. Find ways to laugh.

If you're feeling drained from things not working out...

...then take a break from the battle. Do whatever re-energizes you most. Recharge your batteries. Return to the situation with renewed vigor and focus.



Learn more about *Being* resilient

- Beer, M. (2009). *High commitment high performance: How to build a resilient organization for sustained advantage*. San Francisco, CA: Jossey-Bass.
- Cashman, K. (2008). *Leadership from the inside out: Becoming a leader for life*. San Francisco, CA: Berrett-Kohler Publishers.
- Paulson, T. L. (2010). *The optimism advantage: 50 simple truths to transform your attitudes and actions into results*. Hoboken, NJ: Wiley & Sons.
- Trestman, M. (2010). *Perseverance: Life lessons on leadership and teamwork*. Edina, MN: Bernstein Books.
- Zolli, A., & Healy, A. M. (2013). *Resilience: Why things bounce back*. New York, NY: Simon & Schuster.



Deep dive learning resource links

- Collingwood, J. (2010). *Dealing with anger constructively*. Psych Central. Retrieved from <http://psychcentral.com/lib/dealing-with-anger-constructively/0003155>
- Goudreau, J. (2013, March 20). 12 Ways to eliminate stress at work. *Forbes*. Retrieved from <http://www.forbes.com/sites/jennagoudreau/2013/03/20/12-ways-to-eliminate-stress-at-work/>
- Hannon, K. (2012, December 26). 6 Key steps for career resilience. *Forbes*. Retrieved from <http://www.forbes.com/sites/kerryhannon/2012/12/26/6-key-steps-for-career-resilience/>
- Ireland, K. (2013, August 16). *How to show self-confidence tips & tricks*. Livestrong. Retrieved from <http://www.livestrong.com/article/191199-how-to-show-self-confidence-tips-tricks/>
- Kleiman, J. (2013, January 28). 7 Ways to bounce back from career mistakes, missteps, and misunderstandings. *Forbes*. Retrieved from <http://www.forbes.com/sites/work-in-progress/2013/01/28/7-ways-to-bounce-back-from-career-mistakes-missteps-and-misunderstandings/>
- Levin, H. (2012, May 3). *How to stay motivated at work*. Fox Business. Retrieved from <http://www.foxbusiness.com/personal-finance/2012/05/03/how-to-stay-motivated-at-work/>
- Mayo Clinic Staff. (2013). *Coping with stress: Workplace tips*. Mayo Clinic. Retrieved from <http://www.mayoclinic.org/coping-with-stress/art-20048369>
- Ryan, J. R. (2010, June 11). Four ideas for a positive workforce. *Bloomberg Businessweek*. Retrieved from http://www.businessweek.com/managing/content/jun2010/ca2010068_804146.htm
- Wakeman, C. (2009, June 8). A guide to dealing with resistant employees. *Fast Company*. Retrieved from <http://www.fastcompany.com/1293211/guide-dealing-resistant-employees>

Recommended search terms

If you'd like to explore *Being* resilient further, try searching online using the following terms:

- Becoming resilient.
- Being persistent at work.
- Building perseverance.
- Showing confidence at work.
- Working through resistance.

Resourcefulness

Securing and deploying resources effectively and efficiently.

So much to do; so little time to do it. Finite resources; infinite needs. Everyone having more to do than they can get to. Sound familiar? That's life in organizations today. There are often more opportunities than there are people, time, and money available. Most anyone can produce results, given unlimited resources. The real trick is to produce results by making the best use of the limited resources available. Resourcefulness means finding a way to get things done, even when the odds are against you. Not getting stalled at the first roadblock but, instead, looking beyond the obvious for other viable approaches to accomplishing the goal. Knowing how to find and secure scant resources. Orchestrating efforts so that assignments are executed efficiently and effectively. Challenging yourself to do more with less. And redefining what's possible.

"It's not the lack of resources, it's your lack of resourcefulness that stops you."

Tony Robbins – American entrepreneur and motivational speaker

Skilled

Marshals resources (people, funding, material, support) to get things done.

Orchestrates multiple activities simultaneously to accomplish a goal.

Gets the most out of limited resources.

Applies knowledge of internal structures, processes, and culture to resourcing efforts.

Less skilled

- Has difficulty figuring out where to get resources.
- Relies on the same resources over and over.
- Gets frustrated and becomes inefficient when things don't go as planned.
- Tries to impose one way of doing things; doesn't adjust swiftly enough.

Talented

- Gets the most out of available resources and secures rare resources others can't get.
- Adapts quickly to changing resource requirements.
- Enjoys multi-tasking; applies knowledge of the organization to advance multiple objectives.

Overused skill

- Stretches available resources beyond capacity.
- Hoards resources from others.
- Sometimes gathers resources too far ahead of time or obtains excess resources.
- Diverts too quickly from planned approach when something unexpected happens.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Resourcefulness. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Poor planner.
- Disorganized.
- Doesn't delegate.
- Not flexible.
- Inexperienced.
- Slow decision maker.
- Poor time management.
- Uncomfortable with ambiguity.



Did you know?

Resourcefulness is such an integral part of life in bustling India, it has given rise to a particularly Indian form of innovation known as *jugaad*. Tracing its popular roots to Indian farmers' construction of jitney-like vehicles from scrap wood and irrigation pump motors, *jugaad* has found its way into the management lexicon as companies increasingly turn to "frugal innovation" practices to fuel their R&D operations. Recent innovations in everything from cars to medical devices to mobile banking all owe some inspiration to the principles of *jugaad*.^{41, 42}

Tips to develop Resourcefulness

- 1. Need a plan? Lay out the work.** Resourcefulness starts out with a plan. A good plan helps everyone who has to work under it. It leads to better use of resources and facilitates getting things done efficiently. Lay out the work from A to Z. What are your goals? What's mission critical and what's trivial? What's the time line? What resources will you need? Who controls the resources (time, people, funding, tools, materials, support)? What's your currency? How can you pay for or repay the resources you need? Break complex and multi-tracked projects down into a series of tasks. Ask others to comment on your ordering and note what's missing. When you're ready, set the plan. Use flowcharting or project planning software that does PERT and Gantt charts. Set aside 20 minutes at the start of each week to review your plan, prioritize, and manage your resources.
- 2. Wasting time? Invest it wisely.** Your time and that of others is a precious resource not to be wasted. At some point, everyone has wished for more hours in the day. Be time sensitive. Accurately plan your time and the time you need from others and manage against it. Set deadlines for yourself. Use your best time of day for the toughest and most critical projects—your "A" tasks. If you're best in the morning, don't waste it on "B" and "C" level tasks. Don't secure and deploy resources too early or too late in a project; both can lead to time being wasted. Attach a monetary value to time. Figure out what you and your other people resources are worth per hour based on gross salary plus overhead and benefits. Then ask: Is this task worth that amount of time and money? What would be a more valuable investment? Remember that the higher up you go, the higher the monetary value on time will be.
- 3. Difficulty securing all you need? Work with what you have.** You can't always delay taking action while you wait to get every last bit of resources that you need. It might never happen and doing nothing is likely

not an option. Have the courage to make a start. Be clear about what resources you have, where they are, and what they can do. Focus on what can be achieved. Visualize how you can achieve what you need to. If you were making the most of the resources you have, what would you be doing? What's the best possible result you could deliver? Invite others who are involved to offer suggestions on how to best use the available resources. Be pragmatic. Manage stakeholder expectations where you need to and start small where you have to. But start anyway.

Want to learn more? Take a deep dive...

Kimbrell, G. (2014, January 31). Four project management lessons you can learn from software engineers. *Forbes*.

Larson, E., & Larson, R. (2004, September 10). How to create a clear project plan. *CIO Magazine*.

Saunders, E. G. (2013, January 7). How to allocate your time, and your effort. *Harvard Business Review Blog Network*.

Trammell, J. (2013, June 18). The resource allocation dilemma faced by CEOs every single day. *Forbes*.

4. **Operating on a shoestring? Bargain for resources.** Sometimes you'll need to be creative to get what you need. That means learning to bargain, negotiate, trade, cajole, and influence. What can you borrow? What do you have that you can trade? What do you need to trade for? Who do you know that could help? What could you provide in return? How can you make it a win for everyone? Use relationships to help where you can; find people in your network to borrow from. Working internationally? Adjust your resource-bargaining approach to match the local culture. Worried you may be pushing the ethics envelope? Study up on the legal practices of the country in which you are operating and how they may influence or limit what you can do. If you are operating in a questionable area, get help from legal or others who have worked in similar situations.
5. **Money tight? Watch the budget.** Be clear on exactly what funding you have and plan spending carefully. Write down all your funding sources along with when each element of funding will be available. Make a list of the costs you're anticipating and when they are likely to occur. Which are fixed and which might vary? Align the funding coming in to the expenditures going out. If you can, have a reserve in case the unexpected comes up. Projected spending higher than the funding available? Look at the variable costs to find areas to cut back. Or work backwards—take the funding you have available and consider how to best spend it in line with what needs to be delivered. Set up a funding time line to track ongoing expenditures. Review your spending regularly to keep on track.
6. **Not getting the most out of people resources? Delegate.** On long, complex, multi-track projects, you can't do everything yourself. Your people resources each come with a unique set of skills, knowledge, experience, and ideas. All available for you to tap into. Get comfortable giving up control. Give away as much as possible along with the authority that goes with it. Be clear on the outcome required but open on how it's achieved. Give people leeway, encourage experimentation. One clear finding in research is that people are more motivated when they have control over their work, can determine how to do it, and have the authority to make decisions. It's also developmental. Telling them how to do it may help you in the short-term, but if people just carry out your instructions, they won't grow. Agree on boundaries and authority levels. Give context to the bigger strategic picture—take three extra minutes to talk about its importance to the goals and objectives of the unit.

- 7. Limited pool of resources to draw upon? Observe master resource builders in action.** Do you tend to rely on the same resources over and over? Amazed by others who get resources from far and wide? Who find and secure the rare resources others can't? Don't just wonder at them, actively observe their behavior. How do they get things done? How do they use internal culture, structures, and processes to get what they need? How do they influence and negotiate? What tactics do they use to expedite things through the organizational maze? How do they use their networks? Who do they rely on for help and to get things done? What relationship do they have with the gatekeepers who control the flow of resources? Compare your approach to theirs. What do they do that you don't? Who do they know that you don't? Get to know them better; use them as a mentor. Learn their strategies then borrow them for yourself.

Want to learn more? Take a deep dive...

Green, H. (2012, June 12). Four strategies for getting it done in your organization. *Forbes*.

Lawrence, L., Hernandez Requejo, W., & Graham, J. L. (2011, June 28). Negotiating over a limited resource: What would you do? *Harvard Business Review Blog Network*.

Mind Tools. (n.d.). *Successful delegation: Using the power of other people's help*. Mind Tools.

Westland, J. (2011, June 23). Project management: 4 Ways to manage your budget. *CIO Magazine*.

- 8. Overwhelmed? Manage your state of mind.** Think it can't be done? That it'll never work? This is negative self-talk. It reinforces beliefs that limit what is possible. Learn to eliminate negative self-talk and replace it with something more helpful. Look at complex problems and hold the belief that they can be solved, even when others are telling you otherwise. Turn negatives like "I can't do this" or "This is impossible" into positive questions: "How can I do this?" "How is this possible?" It shifts your thinking from the problem to the solution. From what you can't do to what you can do. What you think shapes your reality. And in the words of Henry Ford, "Whether you think you can, or you think you can't—you're right."
- 9. Frustrated when things don't go according to plan? Expect the unexpected.** Are you a perfectionist? Create plans and expect to follow them without deviation? Get frustrated when circumstances change? Even the best laid plans go astray when the unexpected happens. Resourcefulness is about knowing this and preparing for it. Build contingency into your resources where you can. Have a Plan B as well as a Plan A. Anticipate changes in circumstances and prepare how you might respond. What will you do if you lose some of your resources? If the time lines are tightened? Funding cut? Stay calm when the unexpected does happen. Take an objective look at what's changed and avoid the urge to act impulsively. Don't waste time and energy on things you can't change. Focus on what you *can* do. Ask questions that provoke resourceful thinking. What result am I working toward? Where am I now? What's my best option? What do I have influence and/or control over? How much do I need to adapt my plan? What help do I need? What adjustments do I need to make to my resources—time, people, funding, etc.? Adapt swiftly. Remember, resourcefulness is measured by the ability to achieve the outcome, not follow the plan.
- 10. Stuck with one way of doing things? Be creative.** Resourcefulness is, in part, about finding creative new ways of doing things. Experimenting when an initial approach doesn't work. If you find yourself relying on the same methods time after time, reflect on what's preventing you from being more creative. Fear of failure? Creative people see failure as an opportunity to learn. Worried what people may think? Being creative means putting up the new and unique for review and critique. Get out of your comfort zone. Beware of "I have always..." or "Usually, I..." Focus on "What haven't I tried" or "What would happen if..." Learn from others who've achieved the outcome you're seeking. Find out what made them effective. Take a risk.

Don't carelessly disregard the rules, but do find unconventional ways to do things if it helps. Be prepared to explain yourself and apologize if you overstep. Think and act differently; try new things; break free of your restraints.

11. Think there's only one way to get things done? Try different solutions and learn from the results.

Don't expect to get it right the first time. A low-risk, perfectionist mindset leads to safe and stale solutions. Many studies show that the second or third try is when we really understand the underlying dynamics of problems. To increase learning, shorten your action time and get feedback loops—aiming to make them as immediate as possible. The more frequent the cycles, the more opportunities to learn. If we do something in each of three days instead of one thing every three days, we triple our learning opportunities and increase our chances of finding the right answer.

Want to learn more? Take a deep dive...

Clark, N. F. (2013, July 15). A surprising way to get things done on time. *Forbes*.

Conlon, C. (2011, October 12). *7 Wise ways to find focus and get things done*. Life Hack.

Mayo Clinic Staff. (2011, May 28). *Positive thinking: Reduce stress by eliminating negative self-talk*. Mayo Clinic.

Pitagorsky, G. (2011, January 26). Project managers are change managers. *Project Times*.

Job Assignments Specific to Your Role

- Begin something from scratch that requires you bringing a team together and initiating simultaneous actions under a tight time frame.
- Plan an off-site meeting, training, or other event where you're almost certain to encounter changing requirements and obstacles that will test your resourcefulness.

Additional Job Assignments

- Offer to lead an under-resourced project that requires you to bargain and trade with others to get what you need to succeed.
- Take on a task where you've failed in the past. Push yourself outside your comfort zone and experiment with new ways of achieving success.
- Consider tasks that are no longer developmental for you but would be for others, and delegate them.

Take time to reflect...

If the task seems impossible with the resources you have...

...then renegotiate and refocus. Figure out what's possible with limited resources. The resources that have brought you this far can probably take you even further. Use old tools in new ways. Improvise and adapt. Find a way.

If your "go to" resources have got up and gone...

...then recognize the risks of relying on the same sources again and again. Seek out new options. Use your knowledge of your environment. Tap into connections. Always be on the lookout.

If you don't have what you need to get the job done...

...then consider that the solution doesn't always stare you in the face. Look beyond the obvious. Get creative. Think possibilities and "what ifs." Sometimes the most unlikely options turn out to be the best fit.



Learn more about Resourcefulness

Achor, S. (2010). *The happiness advantage: The seven principles of positive psychology that fuel success and performance at work*. New York, NY: Crown Business.

Chandler, S. (2011). *Time warrior: How to defeat procrastination, people-pleasing, self-doubt, over-commitment, broken promises and chaos*. Anna Maria, FL: Maurice Bassett.

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Kerzner, H. R. (2009). *Project management: A systems approach to planning, scheduling, and controlling*. Hoboken, NJ: John Wiley & Sons, Inc.



Deep dive learning resource links

Clark, N. F. (2013, July 15). A surprising way to get things done on time. *Forbes*. Retrieved from <http://www.forbes.com/sites/womensmedia/2013/07/15/a-surprising-way-to-get-things-done-on-time/>

Conlon, C. (2011, October 12). *7 Wise ways to find focus and get things done*. Life Hack. Retrieved from <http://www.lifehack.org/articles/productivity/7-wise-ways-to-find-focus-and-get-things-done.html>

Green, H. (2012, June 12). Four strategies for getting it done in your organization. *Forbes*. Retrieved from <http://www.forbes.com/sites/work-in-progress/2012/06/12/four-strategies-for-getting-it-done-in-your-organization/>

Kimbrell, G. (2014, January 31). Four project management lessons you can learn from software engineers. *Forbes*. Retrieved from <http://www.forbes.com/sites/theyec/2014/01/31/four-project-management-lessons-you-can-learn-from-software-engineers/>

Larson, E., & Larson, R. (2004, September 10). How to create a clear project plan. *CIO Magazine*. Retrieved from http://www.cio.com.au/article/166486/how_create_clear_project_plan/

Lawrence, L., Hernandez Requejo, W., & Graham, J. L. (2011, June 28). Negotiating over a limited resource: What would you do? *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/06/negotiating-over-a-limited-res/>

Mayo Clinic Staff. (2011, May 28). *Positive thinking: Reduce stress by eliminating negative self-talk*. Mayo Clinic. Retrieved from <http://www.mayoclinic.org/positive-thinking/art-20043950>

Mind Tools. (n.d.). *Successful delegation: Using the power of other people's help*. Mind Tools. Retrieved from http://www.mindtools.com/pages/article/newLDR_98.htm

Pitagorsky, G. (2011, January 26). Project managers are change managers. *Project Times*. Retrieved from <http://www.projecttimes.com/george-pitagorsky/project-managers-are-change-managers.html>

Saunders, E. G. (2013, January 7). How to allocate your time, and your effort. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/01/how-to-allocate-your-time-and/>

Trammell, J. (2013, June 18). The resource allocation dilemma faced by CEOs every single day. *Forbes*. Retrieved from <http://www.forbes.com/sites/joeltrammell/2013/06/18/the-resource-allocation-dilemma-faced-by-ceos-every-single-day/>

Westland, J. (2011, June 23). Project management: 4 Ways to manage your budget. *CIO Magazine*. Retrieved from http://www.cio.com/article/684978/Project_Management_4_Ways_to_Manage_Your_Budget

Recommended search terms

If you'd like to explore Resourcefulness further, try searching online using the following terms:

- Bargaining for limited resources.
- How to work with limited resources.
- Planning your time effectively.
- Reducing negative self-talk.
- Using different strategies to get things done.

Drives Results

Consistently achieving results, even under tough circumstances.

Driving results is an overall achievement mindset, a bias for action, an eagerness to take the initiative. People who drive for results infuse their teams and organizations with a sense of urgency. They help create a culture where organizational performance is always top of mind. Results might be quantifiable—measured in terms of P&L, sales growth, customer satisfaction ratings, new products launched. Or results may be qualitative—an enhanced reputation among customers, a more vibrant brand that attracts customers and employee talent. In successful organizations, the efforts of individuals, teams, functions, departments, and business units are aligned around these objectives. Driving results means communicating a vision, setting priorities, developing and executing plans that achieve the desired outcome—for the organization and the world. As a leader, you *must* be willing to act and follow through to drive results.

“If my mind can conceive it, and my heart can believe it, I know I can achieve it!”

Jesse Jackson – American civil rights activist

Skilled

Has a strong bottom-line orientation.

Persists in accomplishing objectives despite obstacles and setbacks.

Has a track record of exceeding goals successfully.

Pushes self and helps others achieve results.

Less skilled

- Is reluctant to push for results.
- Does the least to get by.
- Is an inconsistent performer.
- Gives up easily; doesn't go back with different strategies for the third and fourth try.
- Often misses deadlines.
- Procrastinates around whatever gets in the way.

Talented

- Sets aggressive goals and has high standards.
- Is consistently one of the top performers.
- Pursues everything with energy, drive, and the need to finish.
- Persists in the face of challenges and setbacks.
- Always keeps the end in sight; puts in extra effort to meet deadlines.

Overused skill

- Goes for results at all costs without appropriate concern for people, teams, due process, or possibly norms and ethics.
- May be so deadline oriented that he/she pushes to get something done rather than taking the time to do it right.
- Even in the face of near insurmountable obstacles, sticks with the effort beyond reason.
- Puts too much pressure on self and others to achieve the impossible.
- May not celebrate and share successes.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Drives* results. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Loses focus.
- Disorganized.
- Not strategic.
- Procrastinates.
- Sets unrealistic expectations.
- Poor planner.
- Burned out.
- Afraid of mistakes.
- Lacks commitment and accountability.



Brain booster

So driven that you can't relax? For the highest achievers, it can be hard to stop and take a break, but it turns out that rest and relaxation is exactly what helps us maintain high levels of achievement. This may feel like a paradox, but conduct your own experiment to see for yourself. Research has shown that short naps improve the vigilance and judgment of air traffic controllers. Getting a full night's sleep improves memory. Staying unplugged on vacation decreases the likelihood that you'll leave your company. Stepping away, switching off, relaxing, and protecting your workout time all contribute to higher productivity and better job performance. While wishing for more hours in your day is futile, wishing for more energy during your day is achievable.⁴³

Tips to develop *Drives* results

1. **Have a big idea? Convert it to action.** Ever get on board with a big initiative, only to run out of steam? Create inspiring plans in an off-site and then forget about them? Or set an audacious goal in January and lose track of it by February? Big ideas produce big results over the long haul. In fact, they can be downright transformative. But to see results, you need to translate ideas into action. If you are part of something big, keep it front of mind by making it visible. Post a photo or other reminder on your screensaver so you see it every time you open your laptop. Create a visual model or time line and share it with others. If it involves the whole organization, get HR, marketing, communications, or other relevant groups involved. Create a communications plan. Put time on the calendar to get things moving. A vision is just a good idea until you take action.

2. **Not bold enough? Take reasonable risks.** Won't take a risk? Micromanaging to avoid mistakes? Running another analysis of last month's figures? Rethinking decisions? If this is you, practice pushing yourself forward. Sometimes producing results involves taking chances and trying bold new initiatives. Doing those things leads to more misfires and mistakes but sometimes better results. Treat any mistakes or failures as chances to learn. Nothing ventured, nothing gained. Up your risk comfort. To get results, you need to keep things moving. Making decisions. Approving plans. Start small so you can recover more quickly. See how creative and innovative you can be. Let go of perfection and aim for excellence. Satisfy yourself; people will always say it should have been done differently. Listen to them, but be skeptical. Ask yourself what's at stake. And what's the worst that can happen. Then turn the question around: What good things will *not* happen if you fail to act? Allow reasonable time to consider options, then make the best decision possible. Conduct a postmortem immediately after finishing. This will indicate to all that you're open to continuous improvement whether the result was stellar or not.
3. **Procrastinator? Start now.** Are you a lifelong procrastinator? Do you perform best in crises and under impossible deadlines? Do you wait until the last possible moment? If you do, you may miss deadlines and performance targets. You might not produce consistent results. Some of your work will be marginal because you didn't have the time to do it right. You settled for a B when you could have gotten an A if you had one more day to work on it. And you might be causing yourself and your teammates unnecessary stress. Save "crisis mode" for your own time. When others are depending on you, get going. Start earlier. Try doing 10% of each task immediately after it is assigned so you can better gauge what it is going to take to finish the rest. Divide tasks and assignments into thirds and schedule time to do them spaced over the delivery period. Let others know how you are progressing. Always leave more time than you think it's going to take.
4. **Overwhelmed? Focus on priorities.** You're already working at top speed on a full schedule. Then your boss asks you to take on something new—right now. You feel like you need to go in eight different directions and don't know where to start. Before you panic, do some planning. What's mission-critical? What are the three to five things that most need to get done to achieve your goals? Effective performers typically spend about half their time on a few mission-critical priorities. Don't get diverted by trivia and things you like doing but aren't tied to the bottom line. When you've laid out your top priorities, identify a few critical action steps that will move you forward on each one. Notice what is demanding immediate attention—and what is actually already on track. Put some space on your calendar to take care of what is important but not urgent now. Then take care of the urgent. This planning will take just a few minutes and will get you back on track. If you're still uptight, ask for help. And remember to manage your expectations of yourself: as good as you may be, you can't be in two places at once.

Want to learn more? Take a deep dive...

Driscoll, M. (2013, July 18). Research: Why companies keep getting blind-sided by risk. *Harvard Business Review Blog Network*.

Giang, V. (2012, March 18). *15 Ways to stop procrastinating right now*. Business Insider.

Llopis, G. (2013, April 1). The 12 things that successfully convert a great idea into a reality. *Forbes*.

Mind Tools. (n.d.). *Taking initiative: Making things happen in the workplace*. Mind Tools.

5. **Problem getting work done through others? Focus on the fundamentals.** Many people can produce results themselves but struggle to make the transition to getting results from the team. Having trouble getting your team to work with you to get the results you need? Have the resources and the people but

things just don't run well? Maybe you do too much of the work yourself. You don't delegate or empower. You don't communicate well. Struggle to motivate. Plan poorly. Find prioritizing difficult. You may need to learn the basics of delegation and good management. To let go of doing it all yourself. To learn to show others what you want done—and let them do it. To paint a clear picture of what is important and why. Delegation is a complex skill. It takes effort to show others what you want. But it pays off over time. The team will become stronger. Results will be better. Read *Becoming a Manager* by Linda A. Hill. Learn from others around you who delegate well.

6. **Trouble getting buy-in? Listen before you act.** Focused on action? Eager to get started? Anxious to get results? These are great qualities for getting to the bottom line. But if you're driving results through others, you need to slow down and include them in your thinking. People can't follow you if they don't know where you are going, and why. Give them the big picture of what needs to happen. Invite them to flesh out ideas and plans. Work with them to define plans and expectations. Help them prioritize their own efforts. Start with a brainstorming session. "Here's what we need to do. How can we do this?" Collaborate on creating a plan. Or hand it off to them. Check in. Stay involved to see how things are going. Let them know how their efforts align with the organizational goals.
7. **People not committed? Set stretch goals and stay involved.** High expectations are great. But if goals are perceived as unachievable, people become skeptical and discouraged. They give up and performance lags. Or, if goals are too low, boredom sets in and performance lags. People lose interest and end up underperforming. Setting stretching but achievable goals shows confidence. It creates optimism and an expectation for success. But don't just set goals. Ask what is needed to get there. Get the resources and support you need—and set checkpoints along the way to measure progress. Give yourself and others as much feedback as you can. Get buy-in. Recognize improvement. Celebrate success. Then agree on next steps to even higher performance.
8. **Group not performing? Address team dynamics.** Leading a stalled project? In danger of missing the goal? Delivering subpar performance? Every group and team is made up of individuals. Some who may be giving more than others. Some who may be willing but struggling. Some may have "checked out" for reasons of their own. If this is happening, assess the team as a whole. Does it have an agreed-upon goal? The right mix of skills? The resources it needs? Adequate support from the organization? Make the changes you need to make to ensure results are achieved. Look at individuals. Do you need to switch out some team members or bring in new skills? Encourage different working relationships? Stimulate new collaborations? Address conflict? Figure out what's not working and make it right. Ask HR for help or bring in a team consultant if you are really stumped.
9. **Getting resistance? Deal with objections.** It's your job to drive a major change initiative. You've got your resources, your time line, your plans. Everything looks good. Until a key group or person raises objections. Why are we doing this? What will this cost? Why are we changing what we've done for 20 years? The best change leaders don't get derailed by pushback. They anticipate resistance. They are equipped to handle the heat of controversy. They allow time to hear objections. Individual meetings. Town halls. Phone conferences. They answer objections and make course corrections. But they don't lose sight of the endgame. The vision. The results. Encourage more objections. If you sense people are holding back, get concerns out on the table. Ask for specifics. Dig deep. Get to the root of the resistance. Understand what's behind the dissent. See it from their point of view. If you were in their shoes, what would you need to hear to be converted?

Want to learn more? Take a deep dive...

Gleeson, B. (2012, December 28). Setting stretch goals: All in, all the time. *Inc.*

Hill, L., & Lineback, K. (2012, April 3). Good managers lead through a team. *Harvard Business Review Blog Network.*

Russell, N. S. (2013, February 8). Six ways to get things done when you're not the boss. *Forbes.*

Sevier, R. A. (2006, September). Moving a team forward. *University Business.*

- 10. Derailed by the unexpected? Define and address the problem.** You're working hard, focused on getting things done. Then something unexpected happens. A system glitch destroys last night's work. An important meeting gets cancelled. Maybe you get stuck in traffic and arrive at the office two hours late. When you are thrown off track by the unexpected, you have two choices. You can either tense up, throw up your hands, snap at a few coworkers, and generally make the situation worse, or you can take a breath, stay calm, and find a way around or through the situation. Pick up the phone, get on e-mail, reach out to others, and work the problem. Use your brain, use your resources. Envision a good outcome. Shift your attitude from "Why is this happening to me?" to "Interesting development. Let's see what we can do with it."
- 11. Disorganized? Use systems to stay on track.** Running late? Missed a phone call? Lost a critical e-mail? When you're going in more than one direction, the occasional slip-up is inevitable. But you can't consistently deliver results if you can't stay on top of the details. Use systems to have a fighting chance of completing things on time and within budget. Log contact info into your phone or e-mail system. Deal with e-mail two to three times a day. Answer, forward, or act on anything you can. File the rest in project folders and put time on your calendar for follow-up. Have a to-do list or system for immediate tasks. Look at it at the beginning or end of the day. Add new items; delete those you've completed. Learn some basic Excel skills to create simple project sheets. Use just one calendar. Color code your files and tasks. Use mobile technology to access your e-mail and calendar on the go. Learn to live without paper. Back up your laptop. Remember that when it comes to being organized, less is more.
- 12. Tempted to quit before the end? Refocus and stick with it.** It may be tempting to reduce your efforts when the end is in sight. After all, your customers have been delighted with the new products. The economy has run strong all year. Things are going well, so results are in the bag—right? Not necessarily. Surprises happen. Contracts get cancelled. Opportunities and sure things fizzle out. Markets crash. If you find your attention flagging, refocus. Winning teams play with the same intensity the whole game, no matter the score. Driving for results means not quitting before the end. Getting results means sticking with the project until it is completed successfully. Keep up a review of what has been done, what remains to be done, and where results will come from. Be persistent. Follow through on every task. Sometimes you'll head off a disaster. Sometimes you'll find an unexpected late win. Check the details. It's not over until it's over.
- 13. Lost in the detail? Focus on the essentials.** Good with the detail? Pride yourself on your expertise? Remember names, dates, and places? Can relate the history of any product your company ever produced? Have the answer to any question? Being this detail oriented doesn't mean you're the quickest to get results. While you're stuck in what you know, the people around you want to move on. To create the next generation of products. To adopt some new ideas. To get up to speed, you don't need to abandon valuable detail. But you do need to streamline your thinking—and your communication. Focus on the endpoint and ask yourself, "How much detail is needed to paint the picture and move us forward?" Use what is needed now. Archive or jettison the rest.

14. Driving too hard? Learn to manage stress. Pride yourself on exceeding goals? Push yourself every day to produce? Always ready for a challenge? Individual responses to stress vary. But for most people, driving for results day after day, quarter after quarter, year after year is stressful. If you're close to burnout or if people can't keep up with you, you're overdoing it. Sustainable performance requires rest and recovery. Athletes train hard, then enjoy the off-season. Performance will improve if you disconnect once in a while. Use your commute to work to get perspective. Enjoy friends and family. Make personal connections at work. Stop to celebrate wins. Learn to take pride in your great results, but balance action with recovery. Take a time out.

Want to learn more? Take a deep dive...

Grant Halvorson, H. (2011, June 22). How to become a great finisher. *Harvard Business Review Blog Network*.

Mayo Clinic Staff. (2011, May 28). *Positive thinking: Reduce stress by eliminating negative self-talk*. Mayo Clinic.

Stolovitsky, N. (2010, August 4). *Planning for the unplanned: Including risk in your project management strategy*. Genius Project.

Wilkinson, M. (2010, June 18). *Why perseverance is an essential quality to possess in the workplace*. Career Path 360.

Job Assignments Specific to Your Role

- Manage the successful implementation of a new process or system under a tight deadline. Secure the right support from your team, board and/or key stakeholders and build a strong sense of commitment to making it a success.
- Create, champion, and track a fundraising campaign with a clear financial goal. Get creative about how it can be exceeded.

Additional Job Assignments

- Lead a team in launching a new product or service with a large potential impact on the business. Involve them in thinking through how to maximize benefit to the business.
- Lead a stalled project to successful completion within the next few weeks. Identify the issues and generate solutions to move it forward.
- Develop an actionable time line to improve performance in a group that has lost momentum. Dig deep for the reasons and take action to get them back on track.

Take time to reflect...

If the goal ahead seems unattainable...

...then make it your mission to get others on board. Securing the commitment of the team is critical. Clarify the goal. Sell the vision. Share the plan. Define roles. Turn them loose.

If you've been pushing hard and don't see an end in sight...

...then remember the goal you are striving toward. Celebrate what you've achieved so far. Regroup. Plunge back in with renewed vigor.

If you can't face those last few steps of the task...

...then ask yourself what's holding you back. Inspiration and aspiration are just the start. Action is what will take you across the finish line. Craft a plan. Carve out the time. Focus on the goal in sight.



Learn more about *Drives* results

Baldoni, J. (2006). *How great leaders get great results*. New York, NY: McGraw-Hill.

Hiam, A. (2003). *Motivational management: Inspiring your people for maximum performance*. New York, NY: AMACOM.

Meier, J. D. (2010). *Getting results the agile way: A personal results system for work and life*. Bellevue, WA: Innovation Playhouse, LLC.

Myers, B. (2012). *Take the lead: Motivate, inspire, and bring out the best in yourself and everyone around you*. New York, NY: Atria Paperback.

Thomas, K. W. (2009). *Intrinsic motivation at work: What really drives employee engagement* (2nd ed.). San Francisco, CA: Berrett-Koehler Publishers.



Deep dive learning resource links

Driscoll, M. (2013, July 18). Research: Why companies keep getting blind-sided by risk. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2013/07/research-why-companies-get-blindsided/>

Giang, V. (2012, March 18). *15 Ways to stop procrastinating right now*. Business Insider. Retrieved from <http://www.businessinsider.com/15-ways-to-stop-procrastinating-right-now-2012-3?op=1>

Gleeson, B. (2012, December 28). Setting stretch goals: All in, all the time. *Inc.* Retrieved from <http://www.inc.com/brent-gleeson/setting-stretch-goals.html>

Grant Halvorson, H. (2011, June 22). How to become a great finisher. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/06/how-to-become-a-great-finisher/>

Hill, L., & Lineback, K. (2012, April 3). Good managers lead through a team. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/04/good-managers-lead-through-a-t/>

Llopis, G. (2013, April 1). The 12 things that successfully convert a great idea into a reality. *Forbes*. Retrieved from <http://www.forbes.com/sites/glennllopis/2013/04/01/12-things-successfully-convert-a-great-idea-into-a-reality/>

Mayo Clinic Staff. (2011, May 28). *Positive thinking: Reduce stress by eliminating negative self-talk*. Mayo Clinic. Retrieved from <http://www.mayoclinic.org/positive-thinking/art-20043950>

Mind Tools. (n.d.). *Taking initiative: Making things happen in the workplace*. Mind Tools. Retrieved from <http://www.mindtools.com/pages/article/initiative.htm>

Russell, N. S. (2013, February 8). Six ways to get things done when you're not the boss. *Forbes*. Retrieved from <http://www.forbes.com/sites/deborahljacobs/2013/02/08/six-ways-to-get-things-done-when-youre-not-the-boss/>

Sevier, R. A. (2006, September). Moving a team forward. *University Business*. Retrieved from <http://www.universitybusiness.com/article/moving-team-forward>

Stolovitsky, N. (2010, August 4). *Planning for the unplanned: Including risk in your project management strategy*. Genius Project. Retrieved from <http://www.geniusproject.com/blog/pm-best-practices/planning-for-the-unplanned-including-risk-in-your-project-management-strategy/>

Wilkinson, M. (2010, June 18). *Why perseverance is an essential quality to possess in the workplace*. Career Path 360. Retrieved from <http://www.careerpath360.com/index.php/why-perseverance-is-an-essential-quality-to-possess-in-the-workplace-4-9318/>

Recommended search terms

If you'd like to explore *Drives* results further, try searching online using the following terms:

- Effectively reducing stress at work.
- Getting work done through others.
- Planning for unexpected problems at work.
- Risk management.
- Setting stretch goals for employees.
- Turning an idea into reality.

Balances Stakeholders

Anticipating and balancing the needs of multiple stakeholders.

A stakeholder has a legitimate claim, or a “stake.” Stakeholders affect or are affected by the actions of an individual or the organization. They may be internal to the organization or external. Decision makers or decision approvers. Information providers or information seekers. They may be actively involved or on the sidelines. They may have different priorities—sometimes complementary, sometimes conflicting. That’s what makes balancing stakeholder needs so important. Getting anything of value done today isn’t a go-it-alone proposition. Stakeholders are critical to the success of any strategy, initiative, or project. They may be the team in charge of executing your vision. Or the person who pulls the approval strings. They could be the customer. Investors. The board. Stakeholders can be advocates for you or just as easily be blockers. Creating the right balance in working with stakeholders can mean the difference between a project flying or crashing. And it’s a juggling act. Knowing who to engage with and when. Who to inform and to what degree. Who has something you need to be successful and what they expect in return. And recognizing that balancing often means you won’t please every stakeholder every time.

“Find the appropriate balance of competing claims by various groups of stakeholders. All claims deserve consideration but some claims are more important than others.”

Warren G. Bennis – American scholar, organizational consultant, and author

- Skilled**
 - Understands internal and external stakeholder requirements, expectations, and needs.**
 - Balances the interests of multiple stakeholders.**
 - Considers cultural and ethical factors in the decision-making process.**
 - Acts fairly despite conflicting demands of stakeholders.**

- Less skilled**
 - Focuses on meeting current expectations and needs of a limited number of stakeholders.
 - Considers some stakeholders’ interests more strongly than others’.
 - Allows conflicting stakeholder demands to unfairly influence actions.

- Talented**
 - Maintains frequent interactions with a broad stakeholder network.
 - Takes a proactive approach to shape and influence stakeholder expectations.
 - Serves as a liaison between different stakeholder groups.
 - Effectively aligns the interests of multiple, diverse stakeholders.

Overused skill

- Spends too much time interacting with stakeholders, slowing down decision making.
- Is too focused on clarifying stakeholder needs and building consensus among stakeholders when others are looking for clear direction on day-to-day business matters.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Balances* stakeholders. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Poor communication skills.
- Wants to please everyone.
- Poor influencer.
- Ineffective networker.
- Not attuned to others' needs.
- Weak at building relationships.
- Not strategic.
- Avoids conflict.
- Narrow perspective.
- Uncomfortable with complexity.



Does it best

With around 44,000 service stations and 10 million customers to satisfy every day, balancing stakeholders is a tall order for Shell's leaders. They recognize five areas of stakeholder responsibility: shareholders, customers, employees, suppliers, and society. All have different priorities and all are essential to Shell's success. Shareholders want their investment protected. Employees need to be safe, healthy, and motivated. Suppliers need good business relationships with Shell. Customers want value for their money as well as cleaner, more efficient fuels. Communities need to be reassured of a safe environment. To ensure the needs of all its stakeholder groups are met, Shell applies three criteria in its decision making: the economic impact, the social impact, and the long-term effect. Shell leaders make it their business to understand what's important to people and go the extra mile to act upon it. For example, Shell LiveWire is an online community for young entrepreneurs. Shell provides resources and information to help them turn their ideas into reality. With annual revenue in excess of US\$480 billion, Shell was number one in Fortune's Global 500 in 2013. Shell's efforts to balance stakeholder relationships have led to significant competitive advantage.^{49, 50}

Tips to develop *Balances* stakeholders

1. **Don't know where to start? Identify your stakeholders.** Balancing stakeholders effectively starts with knowing who they are. And often your stakeholder group will extend further than you think. Start by considering everyone who could be impacted by what you're working on. Better to start big and narrow it down than overlook people. Who is impacted by the change your strategy or project will bring? Who will support it? Who will fight it? Who has influence and power over what you're doing? Who has an interest in whether the project succeeds or fails? Who has something to contribute—information, time, resources? Get others to help you identify stakeholders. Involve your sponsor, a trusted advisor, or someone in the

know. Who do they see as your stakeholders? Scan internally and consider the less obvious functions. Look outside the organization to groups who may also have a stake. Customers. Suppliers. Community groups. Governmental agencies. Analysts. Make your list, then critique it. Who have you missed? Who's on it that shouldn't be? Leave it. Go back to it. Update it. Keep at it until you're satisfied.

2. Not sure who you're dealing with? Get to know your stakeholders. It's one thing to determine who your stakeholders are, but how much do you actually know about them? To manage them and balance their needs, you have to know what makes them tick. Analyze your stakeholder group. Get to know them. Understand them. Complete a stakeholder analysis to structure your thinking and ensure you cover everything. Here's a start:

- What's their connection to the project?
- What financial interests do they have?
- What motivates them?
- What's their current view of the situation?
- How are they likely to feel about the intended outcome of what you're working on?
- Who else might influence their opinions?
- What information do you want from them?
- What's strategically important to them?
- What's their vision for their part of the organization?
- Where is their thinking in terms of changes taking place in the organization?
- What history do they have that could be significant to the future?

Test yourself. If you can't answer the questions, then do some research. Ask people who know them. Ask the stakeholders themselves. Look into their background and experience. Think about how your work links to their role. Build a clear picture that will form the foundation of your interaction with them.

3. Stuck at the starting gate? Engage key stakeholders early. Getting an idea off the ground can be a tricky business. Sometimes you need all the help you can get to start things moving. So make use of some of your most powerful stakeholders. Those who know the organization well. Those who can influence decisions. Get them on board right from the beginning by asking them to help you define and shape the thinking. Call on their experience to ensure you plan things in the right way. Tap into their knowledge. Ask for their guidance on potential pitfalls. Use their positional power to get heard. Involving them from the kick-off can mean you're more likely to have their support going forward. People generally have a higher level of interest in both progress and outcomes when they've been involved from the start.

4. Only consider the upsides? Think worst-case scenario. In planning to get the balance right, think what could go wrong. Anticipate the obstacles before they appear. Part of preparing for things to go right with stakeholders is to think through what could go wrong. What's the worst possible scenario when it comes to balancing your stakeholders? Sponsors who don't buy into the benefits of your strategy? Team members who have no idea what's expected of them to execute on the plan? Peers caught off guard by how much time they must invest in your pet project? Customers blindsided by a large-scale change that impacts their own business? Power players who feel excluded from the decision-making process? Think about all that could go wrong, and then plan to get it right.

Want to learn more? Take a deep dive...

Giang, V. (2013, September 8). *How to win loyalty from others*. Business Insider.

Hack, N. B. (2011, May 3). How deeply engaging stakeholders changes everything. *Forbes*.

Kokemuller, N. (n.d.). How to deal with multiple stakeholders in organizations. *Chron*.

Springman, J. (2011, July 28). Implementing a stakeholder strategy. *Harvard Business Review Blog Network*.

5. **Struggling with juggling? Prioritize.** Stakeholder groups can become very large, which will have an impact on your success in getting the balance right. You can't hope to give everyone the same level of attention, nor should you. You need to determine where to channel your energy and define the type of interaction you should have with each individual or group. Create an Influence/Interest grid—a 2X2 with "High to Low" axes describing the level of influence, or power, each stakeholder has, including their degree of interest. Classify each of your stakeholders. Use their position on the grid to determine how to interact with each of them. High Power/High Interest are the stakeholders you must manage most closely. Fully engage them and make the greatest effort to meet their needs. If you can't, explain why. High Power/Low Interest—keep them engaged, but don't bore them with too much detail. Low Power/High Interest—keep them adequately informed, but don't expend too much energy on them. Low Power/Low Interest—monitor them, but dedicate minimum effort. Keep in mind that influence and interest can change due to a number of factors: role change, resource reallocation, other projects in the works, change in strategic direction. Keep alert to these changes and assess the effect they may have on your stakeholders. Keep your picture current.
6. **Unsure how to involve stakeholders? Differentiate involvement.** Involving everyone fully can become difficult to manage and slow down decision making. How actively involved should each of your stakeholders be? How do you decide how to balance involvement with just keeping them informed? Will they be on the periphery—on the outside looking in? Or will they be pivotal—at the hub of the action? It depends on a number of factors: The stakeholder's role and level of authority. The degree to which the project depends on their input. Their attitude toward the project. Supportive? They can be a great influence on others. Negative? On the one hand, they can derail, but on the other, you may want them where you can keep an eye on them—"Keep your friends close and your enemies closer." Consider these factors in your stakeholder analysis and categorize each individual or group's involvement: Essential—their input could make the difference between success and failure. Not involving them could cause issues with engagement and support. Optional—you can get there without their active contribution, but their involvement will make things quicker, easier, and more effective. Non-essential—others could contribute on their behalf. Make your assessment. Monitor progress. Adjust as needed.
7. **Dealing with differing support? Manage collaborations.** Your stakeholder group is a great resource. Leverage the power by creating good connections and encouraging productive interactions. Make use of the differing viewpoints within the group. Assess people's attitudes and understand their points of view. Who will gain? Winners are likely to be positive. Who will lose? Those who are disadvantaged are more likely to be a challenge. Consider who has something that could be helpful to other stakeholders. Who has information? Facts and figures? Background details not readily available? Historical data? Establishing where people fall will help you decide who should communicate with whom. Who to group together in meetings concerning the project. Try to avoid your negative people having too much contact with each other. Mix your positive people with your negative people. Connect your dissenters with those who can help

them see the benefits of the project. If someone has had a bad past experience that's tainting their view of the way forward, encourage their interaction with people who are open-minded and have a fresh outlook. Connect them with people who see the benefits and are not constrained by the past. If someone can't see the advantages of change, have them spend time with people who thrive on the new and different. Managing collaborations will help foster project success.

- 8. Out of sight, out of mind? Engage stakeholders near and far.** It's easier to focus on stakeholders you come into contact with more frequently. Those you bump into at the water cooler. The people who attend the same meetings as you. But it's likely you have stakeholders at different locations. Those internal to the organization's home office or located in different regions. Externals like customers, the board, outside agencies. These may be the stakeholders who need more engagement but could end up getting far less because of proximity. Beware the distance trap. Draw up a communications plan and stick to it. Make sure to include external stakeholders when you provide updates. Alert them to news that's relevant to the project and impacts them. Give them as much opportunity as possible to have direct contact with other stakeholders. Go see them at their own location.

Want to learn more? Take a deep dive...

Duff, V. (n.d.). How can stakeholders negatively influence a project? *Chron*.

Ernst, C. (2009, October 28). Leadership beyond bounds. *Forbes*.

Thompson, R. (n.d.). *Stakeholder analysis: Winning support for your projects*. Mind Tools.

- 9. Unhappy stakeholders? Listen to what matters to them.** Don't confuse being a stakeholder with being a supporter. Supporters emerge when they can see clear benefits from the project's success. Economic gain. Status improvement. An easier way to operate. Stakeholders can be non-supporters or resisters too. The strategy, once executed, will mean more work. Loss of relationships. Less security. Departure from something they know and are comfortable with. Understanding resisters' points of view is essential if you are to balance their concerns with the reality of what needs to happen. Chances are you won't be able to give them everything they want, but you can show that you empathize and recognize what's important to them. Make a point of understanding their concerns. Find out why they feel as they do. Understand the history that's driving their view of the future. Have they been here before? Have they had a bad experience with something similar? Are they threatened by potential outcomes? What are they missing that could help them see the benefits of your direction? If they're going to lose out, how can you cushion that blow? They may never be your greatest advocate, but you can help them accept.
- 10. Conflicting viewpoints? Focus on strategy.** Stakeholders often have conflicting priorities and your challenge is to manage those. One person's loss can be another person's gain. A reduction in resources may mean cost savings for one stakeholder but a major execution challenge for another. A new process may mean more work for one team while effort is reduced in another. A change or variation in a product may be disappointing for one customer but exactly what the other customer is looking for. Start with empathy. Understand each point of view and recognize why their views are important to them. A rule of thumb in dealing with conflicting viewpoints is to try to find some common ground. In the case of your stakeholders, this may be difficult. Each likely has a solid rationale to back up their view. You need to be seen as objective and not playing favorites. So be impartial. Make it about the purpose, not about them. Show how the objectives of the project align with the strategic intent of the organization. Help them see the

benefits more broadly than strictly how it impacts them. You may never get to a meeting of minds, but you can help them understand why you're doing what you're doing.

- 11. Once-and-done stakeholder planning? Monitor changes.** People change. Views alter. Priorities shift. Don't assume that where your stakeholders were when you first engaged with them is where they are now. You need to be on the ball and keep up-to-date about stakeholder changes so you can modify your approach. Their role could have changed. Their position as a stakeholder may not be as influential. Perhaps they now have *more* power. Their interest level may not be what it was. Keep track. Stay in touch. Check the status quo when it comes to your stakeholders to ensure you understand their position. Don't make assumptions. Check in with them regularly. Take a temperature check on how they're feeling about things. What do they need more of? Less of? What's going on in their world that may affect their stakeholder position? Monitor continuously to keep balance in check.

Want to learn more? Take a deep dive...

Blanch, A. (2013, August 5). *How to manage difficult stakeholders*. Business Think Tank.

Hack, N. B. (2012, May 30). Improving stakeholder engagement increases productivity, profit and sustainability. *The Huffington Post*.

Merrett, R. (2012, July 31). Want project success? Engage stakeholders. *CIO*.

ProjectManager.com. (2013, November 11). *Project stakeholder communication tips*. Project Manager.

Job Assignments Specific to Your Role

- Design a communications plan to inform stakeholders about a change that is not likely to be well-received.
- Get a group of stakeholders together who were involved in a recent project. Gather information from them regarding what worked well for them and what didn't.
- Present the strategic imperatives of the organization to your team and board, explaining where their efforts fit into the larger goals.

Additional Job Assignments

- Take on a project with a wide variety of internal and external stakeholders. Rise to the challenge of juggling priorities, preferences, and needs.
- Volunteer to rescue a project with unhappy stakeholders. Find out what's gone wrong. Engage them in moving forward in the right direction.

Take time to reflect...

If you focus purely on results and forget about people...

...then understand that stakeholders can help you get there faster, but they can also hold you back. Get them on board. Understand them. Engage them.

If you think that having a multitude of stakeholders will slow progress...

...then remember investing time up front can save you time later on. It's less about the number of stakeholders and much more about taking the right approach. The more stakeholders in your corner, the more your ideas will gain traction.

If you think you can predict what each stakeholder group needs...

...then tread carefully. Making assumptions can be dangerous and lead you down the wrong path.



Learn more about **Balances** stakeholders

Kuenkel, P., Gerlach, S., & Frieg, V. (2011). *Working with stakeholder dialogues*. Norderstedt, Germany: Books on Demand GmbH.

Lewis, J. P. (2010). *Project planning, scheduling and control* (5th ed.). New York, NY: McGraw-Hill.

Roeder, T. (2013). *Managing project stakeholders: Building a foundation to achieve project goals*. Hoboken, NJ: John Wiley & Sons, Inc.

Shireman, B., Wohlgemuth, E., & Pfahl, D. (2013). *Engaging outraged stakeholders: How-to guide for uniting the left, right, capitalists, and activists*. New York, NY: Affinity Press.

Walker, S. F., & Marr, J. W. (2001). *Stakeholder power: A winning plan for building stakeholder commitment and driving corporate growth*. Cambridge, MA: Perseus Publishing.



Deep dive learning resource links

Blanch, A. (2013, August 5). *How to manage difficult stakeholders*. Business Think Tank. Retrieved from <http://www.businessthinktank.com.au/how-to-guides/how-to-manage-difficult-stakeholders>

Duff, V. (n.d.). How can stakeholders negatively influence a project? *Chron*. Retrieved from <http://smallbusiness.chron.com/can-stakeholders-negatively-influence-project-36026.html>

Ernst, C. (2009, October 28). Leadership beyond bounds. *Forbes*. Retrieved from <http://www.forbes.com/2009/10/28/boundaries-collaboration-teams-leadership-managing-ccl.html>

Giang, V. (2013, September 8). *How to win loyalty from others*. Business Insider. Retrieved from <http://www.businessinsider.com/how-to-win-loyalty-from-others-2013-9>

Hack, N. B. (2011, May 3). How deeply engaging stakeholders changes everything. *Forbes*. Retrieved from <http://www.forbes.com/sites/85broads/2011/05/03/how-deeply-engaging-stakeholders-changes-everything/>

Hack, N. B. (2012, May 30). Improving stakeholder engagement increases productivity, profit and sustainability. *The Huffington Post*. Retrieved from http://www.huffingtonpost.com/nadine-b-hack/stakeholder-engagement_b_1556070.html

Kokemuller, N. (n.d.). How to deal with multiple stakeholders in organizations. *Chron*. Retrieved from <http://smallbusiness.chron.com/deal-multiple-stakeholders-organizations-62017.html>

Merrett, R. (2012, July 31). Want project success? Engage stakeholders. *CIO*. Retrieved from http://www.cio.com.au/article/432205/want_project_success_engage_stakeholders/

ProjectManager.com. (2013, November 11). *Project stakeholder communication tips*. Project Manager. Retrieved from <http://www.projectmanager.com/project-stakeholder-communication-tips.php>

Springman, J. (2011, July 28). Implementing a stakeholder strategy. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2011/07/implementing-a-stakeholder-str/>

Thompson, R. (n.d.). *Stakeholder analysis: Winning support for your projects*. Mind Tools. Retrieved from http://www.mindtools.com/pages/article/newPPM_07.htm

Recommended search terms

If you'd like to explore *Balances* stakeholders further, try searching online using the following terms:

- Collaborating with stakeholders.
- Dealing with stakeholder conflict.
- How to identify your stakeholders.
- Managing difficult/challenging stakeholders.
- Project stakeholder communication.
- Stakeholder engagement.

Strategic Mindset

Seeing ahead to future possibilities and translating them into breakthrough strategies.

Being strategic involves looking, planning, and moving into the future with clear intentions and purposeful actions. Some think being strategic is an either-or proposition—that a person is either tactical or strategic. Focused on the short-term or long-term. Interested in details or the big picture. While many people gravitate toward one side, a strategic mindset requires readiness for both. It's about doing things today with an eye toward tomorrow. Making decisions now that will lead the organization toward its future objectives. Like deciding where to invest to capitalize on emerging trends in your market. Like building internal capabilities that will help bring a new strategy to life. To develop a strategic mindset, you need to thoroughly understand the territory in which you operate. You need to understand what unique capabilities your unit or organization has to offer. You need to consistently ask where you are going and how you will get there.

“In strategy, it is important to see distant things as if they were close and to take a distanced view of close things.”

Miyamoto Musashi – Japanese swordsman and samurai

Skilled

Anticipates future trends and implications accurately.

Readily poses future scenarios.

Articulates credible pictures and visions of possibilities that will create sustainable value.

Creates competitive and breakthrough strategies that show a clear connection between vision and action.

Less skilled

- Is more comfortable in the tactical here and now.
- Spends little time or effort thinking about or working on strategic issues.
- Contributes little to strategic discussions.
- Lacks the disciplined thought processes to pull together varying elements into a coherent view.

Talented

- Sees the big picture, constantly imagines future scenarios, and creates strategies to sustain competitive advantage.
- Is a visionary and able to articulately paint credible pictures and visions of possibilities and likelihoods.
- Formulates a clear strategy and maps the aggressive steps that will clearly accelerate the organization toward its strategic goals.

Overused skill

- May be seen as too theoretical.
- May be so far ahead that others have trouble seeing how the organization will get from here to there.
- May be impatient with day-to-day tactical issues.
- May overcomplicate plans.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with Strategic mindset. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Doesn't like complexity.
- Prefers what is familiar.
- Short-term focus.
- Lacks competitive drive.
- Overly tactical.
- Low curiosity.
- Too busy with today's tasks.
- Likes things to be predictable.
- Narrow perspective.
- Low-variety background.



Did you know?

A strategic approach to leadership is, on average, 10 times more significant to your perceived effectiveness than other behaviors. At least that's what a global survey of 60,000 managers conducted by the Management Research Group in 2013 found. Strategic-minded leaders tend to look much more broadly when they solve problems and make decisions. They think in multiple time frames, balancing achieving things now with planning for potential future outcomes. They think systemically, making connections and understanding the impact their decisions have on other parts of the organization. The study also revealed that those with the highest ratings on these skills associated with strategic mindset were four times more likely than their lower-scoring counterparts to be viewed as high potential within their organization.^{51, 52}

Tips to develop Strategic mindset

1. **Can't anticipate what's to come? Become a trend-watcher.** Too busy getting today's work done to think about tomorrow? To cultivate a strategic mindset, keep one eye toward the horizon. Study emerging trends inside and outside your field. Get in the habit of questioning what things will mean for the future. How is technology driving greater efficiency and breakthrough innovation? How is social media altering the way people make purchasing decisions? Tap into future-focused resources such as the World Future Society, Institute for the Future, or Faith Popcorn's TrendBank. Join the Future Trends group in LinkedIn. Listen to thought-provoking speakers live or online. Meet with colleagues to discuss how events and trends may impact your organization's strategy. Brainstorm ways you can capitalize on emerging opportunities. When examining trends, Rosabeth Moss Kanter advises zooming in and zooming out. Zoom in for sharp focus on important details. Zoom out to see how details form patterns and fit into the bigger picture.

2. **Out of touch with customers? Make customer intimacy a priority.** A winning strategy is designed around the customer. Understand your customers historically, today, and most importantly, tomorrow. What products and services do they want more or less of? How can you improve the user experience? What do your competitors offer that you don't? What trends do you need to monitor and plan for? Analyze market and customer data. Gather fresh insights. Watch customers as they interact with your products or services. Meet with your internal or external customers on a regular basis to understand their needs and desires. Determine which customers you want to keep and which you want to attract in the future. Plan how you'll accomplish these goals. Allocate your greatest resources to your primary customers.

3. **Unclear about the competitive landscape? Get market smart.** Know the industry inside and out, from the smallest to the largest player. Study the competition's annual reports, websites, press releases, social media sites. What are their strengths and weaknesses? What is their strategy related to speed, growth, customers, products/services, innovation, talent, and global reach? How does their strategy compare to yours? Leverage knowledge about your similarities and differences to make better strategic decisions. Apply Michael Porter's Five Forces model to assess the intensity of the competition's power and the profitability of your industry. (*For more information, visit http://www.mindtools.com/pages/article/newTMC_08.htm.*) Spark conversations about how to anticipate the different moving parts in the marketplace. How might you best differentiate and keep your organization out in front?

4. **Not standing out in the marketplace? Identify your distinctive advantage.** A strategy is about what you do and what you want to become. It's also about what you don't do and do not aspire to be. No organization can be all things to all people. You have to make choices. Differentiation can take many forms. You can be a low-cost leader. Deliver quality products, services, or experiences. Or have superior customer relationships. A distinctive advantage is something that is hard for competitors to copy or develop. Spend time understanding your unique capabilities and offerings. Take a stand on what you'll continue to strengthen and promote in the future. Embed this strategy into the culture—employees of low-cost providers hunt for cost-savings; quality-first employees demonstrate an eye for detail; customer-service leaders treat everyone as special. Identify concrete ways to leverage what makes you distinct.

5. **Developing a strategy in a vacuum? Scan the environment first.** Before crafting a strategic plan, you need to get a handle on the context in which you operate. Pull together people with diverse knowledge and create a detailed picture. There are a number of scanning frameworks you can use. The SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is widely used to identify internal and external factors that define and shape a competitive position in the marketplace. A PEST analysis helps to capture the big picture in terms of Political, Economic, Social, Technological topics. (Some add Legal and Environmental.) Bennis and Nanus suggest using the Quick Environmental Scanning Technique (QUEST). In this framework, trends are observed, potential market conditions are forecasted, and options are discussed to address evolving conditions.

6. **Can't predict the future? Consider multiple scenarios.** It's not easy to develop strategic plans when faced with so many unknowns. Scenario planning can assist by generating useful dialogue and insights. It's not about predicting the future. It's about considering various possibilities. Discuss your assumptions about what might happen. Develop a small number of plausible scenarios (stories) about how the future might unfold. Think through how the organization could/should respond if faced with shifts in socioeconomic, political, technological, environmental, or social areas. Then do what expert Peter Schwartz calls "rehearsing the implications." How might things impact your industry, organization, stakeholders? What decisions would you need to make? What else might be triggered? What contingencies should be in

place? Scenario planning makes you better prepared to recognize signals that warrant a response. And better able to anticipate, plan, and adapt when changes arise.

Want to learn more? Take a deep dive...

Edin, P., Lingqvist, O., & Tamsons, A. (2012, July 26). The best sales leaders are trend hunters. *Harvard Business Review Blog Network*.

Howes, L. (2012, December 11). 7 Steps to become an authority in your industry. *Entrepreneur*.

Straub, M. (2013, April 9). Does your business stand out in the marketplace? *The Business Times*.

- 7. Think strategy is a waste of time? Recognize the value of strategy.** Some reject strategic work. They avoid it. They say they'd rather be doing something useful, like solving today's problems. That they've never seen a plan actually happen as projected anyway. While it's true that most strategic plans don't materialize as planned, that doesn't mean it was a wasted effort. A good strategy leads to practical decisions about what to do, who to hire, how to allocate funds and deploy resources. If you have doubts about whether to go ahead with a project, ask: Is this in line with our strategy? If you're wondering which option to choose, ask: Which best aligns with our key priorities? If your team is losing steam, ask: How will what we're doing now position us well for the future? A good strategy energizes people to move in the same direction. It makes choices clear and leads to less wasted effort.
- 8. Looking for certainty? Embrace the unknown.** Strategic planning is one of the most uncertain things leaders do. It's speculating on the near-unknown. It requires projections into foggy landscapes. It requires making assumptions about unfamiliar terrain. Many are uncomfortable making statements they can't back up with facts. Uncomfortable committing resources when there's no money-back guarantee. All adventures come with potential risks and rewards. Most strategies can be challenged and questioned. If you are questioned, think of it as a good thing. Questions from others are really opportunities to further vet your strategic direction. Questions raise issues you may not have thought of and likely yield a sounder approach as a result.
- 9. Consumed with daily demands? Make room for strategic priorities.** Burning issues require attention. It wouldn't be wise to ignore important demands of the day. Neither would it be wise to avoid what will matter most in the long run. You need to strike the right balance. Talk with colleagues to be sure you agree on what projects are mission critical vs. important vs. nice to have. If your team is engaged in activities that don't drive the strategy forward, make the case for discontinuing them. Create a culture of questioning. If people can't justify why something is important, they should question why it's on their plate. Reserve "thinking time" on your calendar to weed out distractions and make strategic adjustments.

Want to learn more? Take a deep dive...

Birshan, M., & Kar, J. (2012, July). Becoming more strategic: Three tips for any executive. *McKinsey Quarterly*.

Clark, D. (2013, October 8). What's keeping you from being strategic? *Forbes*.

Lester, A. (2012, December 7). More companies include retreat time to innovate. *The Boston Globe*.

- 10. Looking for some quick strategic wins? Play to your strengths.** Executing on your strategy may require that you and your team develop new skills. But that doesn't mean you should discount the strengths you already possess. Strategically smart organizations leverage their core capabilities. How can you build upon what is already great to drive your strategy forward? How can your talents' skills be applied more broadly? How can existing infrastructure be advanced? What products or services can be repurposed, redefined, or relaunched? Consider how you can take what's solid and extend it into new ventures. Disney's core is family-friendly entertainment. Over time, they extended their core beyond cartoons into theme parks, media, products, and retail, unlocking progressively more value. Consider how to capitalize on less obvious assets too—your intellectual property, materials, distribution networks, alliances.
- 11. Outdated strategic plan? Keep it fresh, fluid, and flexible.** It used to be that strategic plans were created once a year or every few years. They sat in binders on a shelf. Not today. To stay competitive and nimble, the neat and tidy plans of the past have been transformed into a continuous strategic planning process. Make sure to revisit your strategy frequently. Debate key topics when they arise and focus on making sound decisions quickly. What are the mission-critical priorities? What key metrics will inform and guide you? Whose interests come first—customers, shareholders, employees? When difficult trade-offs surface, look to your core values to determine which way to go. Develop simple rules of thumb to guide people to make on-the-spot decisions, ensuring they stay aligned with the bigger picture.
- 12. Not sure how your role fits in? Identify a clear strategic line of sight.** Understanding strategy is important for people in every role. Learn about your organization's strategy. What primary objectives is it aiming toward? How does it plan to reach them? What critical capabilities and resources does the organization need to succeed? Talk about how your department supports or drives the organization's strategy directly or indirectly. How do you create value? Serve customers? Contribute to growth or the bottom line? Strengthen the brand? Support the community in which you operate? How do other functions build on the work your group produces? Spend time connecting the dots, and you'll have a better sense of what to emphasize in your daily work. If you can't demonstrate how a job aligns with the strategy, why do you have it?
- 13. Get tongue-tied when talking strategy? Learn to speak the language of strategy.** You may have a knack for thinking strategically but not know how to express it very well. Strategy is an emerging and ever-changing field. At any time, there are gurus who create new words and concepts to describe it. If you don't use these words, others may not perceive you as being strategic. Learn from the latest experts. Watch their videos. Read their blogs and articles in the *Harvard Business Review* and similar publications. Read case studies about strategy and find parallels between other organizations and yours. Also pay attention to what your senior leaders are reading and talking about. Offer ideas on topics that match their strategic interests. Use the same terms and metaphors they use in their messages. Practice thinking and speaking more broadly than your own function and level. Go for form *and* substance.

14. Plans interrupted by unwanted change? Approach the future with optimism. It's important to face undesirable realities—competitors disrupting the industry, regulators halting progress, unforeseen events crushing otherwise perfect plans. But doom and gloom forecasts do little to rouse energy and commitment. Make it a point to view needed changes in strategy with an optimistic lens. Reinforce your confidence in the resourcefulness, drive, and competence that you and your colleagues possess. It's hard to imagine new possibilities if you allow crises large and small to dampen your belief in a positive future. When change forces your strategy to change, regroup. Together, paint a new portrait of what's possible.

Want to learn more? Take a deep dive...

Green, H. (2012, September 11). Strategy ain't what it used to be. *Forbes*.

Hatch, J., & Zweig, J. (2001, March/April). Strategic flexibility – The key to growth. *Ivey Business Journal*.

Sirkin, H. L. (2013, September 23). The key to corporate fitness: Agility and flexibility. *Bloomberg Businessweek*.

Job Assignments Specific to Your Role

- Take on a project or assignment that requires significant strategic thinking and planning with key board members and staff with various disciplines and expertise.
- Do a thorough trend analysis and environmental scan of your organization and your community as part of the annual strategic planning process.
- Conduct a competitive analysis of your organization's services and position in the marketplace.

Additional Job Assignments

- Prepare and present a strategic proposal to senior leaders that involves charting new ground. Identify the trade-offs inherent in any strategic decision.
- Manage an aspect of a rapidly expanding or growing operation that is instrumental to the organization's strategy.

Take time to reflect...

If you focus on the here and now...

...then understand that strategy is foresight. What got you here today will not get you there tomorrow. Keep one eye on the present, and focus the other on looking to the future.

If seeing ahead brings more fog than clarity...

...then recognize that a strategic mindset isn't about absolutes. Being curious and well-informed will help shed light on an uncertain future and make you more prepared for that future when it arrives.

If you see strategy as abstract and not concrete enough...

...then make your strategies solid. As you forecast what the organization can become, figure out what needs to happen along the way. Turn abstract goals into a tangible path to action.



Learn more about Strategic mindset

- Hoffman, A. J., & Woody, J. G. (2008). *Climate change: What's your business strategy? (Memo to the CEO)*. Boston, MA: Harvard Business School Publishing.
- Kim, W. C., & Mauborgne, R. (2005). *Blue ocean strategy: How to create uncontested market space and make competition irrelevant*. Boston, MA: Harvard Business School Publishing.
- Magretta, J. (2011). *Understanding Michael Porter: The essential guide to competition and strategy*. Boston, MA: Harvard Business School Publishing.
- Morgan, M., Levitt, R. E., & Malek, W. A. (2008). *Executing your strategy: How to break it down and get it done*. Boston, MA: Harvard Business School Publishing.



Deep dive learning resource links

- Birshan, M., & Kar, J. (2012, July). Becoming more strategic: Three tips for any executive. *McKinsey Quarterly*. Retrieved from http://www.mckinsey.com/insights/strategy/becoming_more_strategic_three_tips_for_any_executive
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- Howes, L. (2012, December 11). 7 Steps to become an authority in your industry. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/blog/225225>
- Lester, A. (2012, December 7). More companies include retreat time to innovate. *The Boston Globe*. Retrieved from <http://www.bostonglobe.com/business/2012/12/07/companies-set-aside-time-for-employees-innovate/Y4cWITyVjmpvKhOfV0GQiM/story.html>
- Sirkin, H. L. (2013, September 23). The key to corporate fitness: Agility and flexibility. *Bloomberg Businessweek*. Retrieved from <http://www.businessweek.com/articles/2013-09-23/the-key-to-corporate-fitness-agility-and-flexibility>
- Straub, M. (2013, April 9). Does your business stand out in the marketplace? *The Business Times*. Retrieved from <http://thebusinesstimes.com/does-your-business-stand-out-in-the-marketplace/>

Recommended search terms

If you'd like to explore Strategic mindset further, try searching online using the following terms:

- Creating strategic flexibility.
- Implementing strategy.
- Learn to be more strategic at work.
- Strategic adaptability.

Builds Effective Teams

Building strong-identity teams that apply their diverse skills and perspectives to achieve common goals.

Teams are the primary way to accomplish coordinated, integrated tasks. Team members need each other and work interdependently to achieve common goals. For some, this is good news—a chance to collaborate with a variety of people. For others, it’s a burden—a productivity drain. Many have had a peak experience working with a dream team that clicked from the start and went on to achieve great things. They wonder why all teams can’t be like that. Here’s the reality—great teams rarely just happen. They require attention to purpose, tasks, relationships, and processes. The rewards can be significant for you and your organization when you set teams up for success. Whether you’re a team leader or team member, whether your team works under the same roof or across several time zones, it pays to be smart about how to structure things and contribute so your team performs at its best.

“Talent wins games, but teamwork and intelligence win championships.”

Michael Jordan – American basketball player and member of the NBA Hall of Fame

Skilled

Forms teams with appropriate and diverse mix of styles, perspectives, and experience.

Establishes common objectives and a shared mindset.

Creates a feeling of belonging and strong team morale.

Shares wins and rewards team efforts.

Fosters open dialogue and collaboration among the team.

Less skilled

- Doesn’t create a common mindset or challenge.
- Fails to recognize that morale, recognition, and belongingness are integral ingredients of effective teams.
- Prioritizes and rewards individual efforts rather than team achievements.
- Doesn’t shape and distribute assignments in a way that encourages teamwork.

Talented

- Defines success in terms of the whole team.
- Recognizes that leveraging each team member’s unique background and perspective is critical to achieving team goals.
- Rallies others behind common team goals.
- Places team goals ahead of own goals.

Overused skill

- May focus so much on teaming behavior that results may suffer.
- May build such a strong sense of team identity that it is hard for new members to break in and get up to speed.
- May not develop individual leaders.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Builds effective* teams. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Prefers working alone.
- Not clear about team purpose and goals.
- Doesn't engage others.
- Needs to be in control.
- Avoids sharing information.
- Excessively action oriented.
- Conflict averse.
- Poor process management skills.
- Avoids holding people accountable.
- Incentives are based upon individual achievement.
- Has difficulty motivating others.



Does it best

In the early days of what would become the Walt Disney Company, there was a core team of animators known colloquially as “Disney’s Nine Old Men” (a name derived from President Franklin D. Roosevelt’s nickname for the nine US Supreme Court Justices). Disney’s team has become an icon in the field of animation, credited with establishing the modern art of animation and revolutionizing children’s films. They created some of the most beloved characters in cartoon history. The team was comprised of very different men, each of whom brought something unique to the table during the creative process. Walt was known as the “Agitator,” stirring debate and playing devil’s advocate. Ub Iwerks was the “Expert.” With a background in animation, Ub created the iconic Mickey Mouse. Walt’s older brother, Roy, was the “Glue,” securing the financial backing needed to build an organization to compete with the larger studios in New York. The Nine Old Men were the “Workhorses,” originating the animated characters that have helped Disney become one of the most widely recognized brands in the world.^{53, 54}

Tips to develop *Builds effective* teams

1. **Not sure why you’re here? Identify clear goals and a unifying purpose.** A common thrust energizes high-performing teams—goal clarity adds focus, power, and efficiency. Set team goals together, prioritize them, and establish ways to measure outcomes and chart progress. What will success look like? How will you know if you meet expectations? Get each team member involved in setting a meaningful purpose—something they believe in that will rouse commitment. Reinvigorate people with the mission when times get tough. Why does the work matter? What will happen as a result of your accomplishments? If it’s a long-

standing team or if focus scatters over time, regroup. Ask each person to individually write and rank the team's current top three priorities. Compare notes. Discuss what needs to be emphasized now and how to better align and execute.

2. **Need solid team players? Select and leverage the right mix.** Analyze the key purpose, tasks, and deliverables of the team, then ask: Who is best suited to do the work? What knowledge, expertise, and skills are critical? Don't stop with the obvious technical/functional requirements. Consider the optimal mix of diverse experiences, backgrounds, and styles. Aim for complementary skills, not more of the same. Who collaborates well? Knows how to make decisions? Keeps people on track? Challenges the status quo? Generates enthusiasm? Isn't afraid to tackle problems head-on? Can build trust inside, build bridges outside? Share each other's strengths so you can capitalize upon them and learn from each other. Talk about your weaknesses and vulnerabilities, too, so that you can work around them for the good of the whole. The team should know who they are and what they stand for, individually and collectively.
3. **Questioning team size? Bigger is not usually better.** There's a tendency for leaders to err on the side of making teams too large, often because they want to be (or seem) inclusive. Watch out, because coordination problems can mount when more people are added. Other downsides: difficulty keeping people on the same page, less active participation from all, people more concerned about projecting an image vs. doing substantive work, greater conformity to the majority view. Most experts agree that it's best to have the smallest number of team members as possible who can still successfully do the work (generally fewer than 10). Break teams up into sub-teams with sub-leaders if needed.

Want to learn more? Take a deep dive...

Wharton School. (2006, June 14). *Is your team too big? Too small? What's the right number?* Wharton School of the University of Pennsylvania.

Young Entrepreneurial Council. (2013, June 7). Five ways to build an effective team. *Forbes*.

4. **Too much guesswork? A little structure goes a long way.** Who does what? How is information shared? Resources obtained? Feedback given? Crises handled? Everyone wants to know. Patterns are often unconsciously set, then unquestionably maintained. Collaboratively design what team expert Richard Hackman calls "an enabling structure." That means establishing norms that will support rather than impede the team's work. Be explicit about what's expected around roles, decision making, running meetings, communication, accountability, processes—anything that will set you up for success. Revisit and adjust things along the way to best support your collective efforts.
5. **Need a clear course of action? Create a game plan.** Once the mission and outcomes and goals are established, a plan is necessary to avoid duplicate work and things falling through the cracks. Use visuals and project management tools that clearly show interdependencies and deliverables. Surface potential risks and discuss how you'll handle them. Given how dynamic things are, expect plans to change. It's usually better to be responsive than to stick to a plan that no longer serves the team's purpose.
6. **Too much individualism? Shift the focus from "me" to "we."** Resistance to the idea of a team is best overcome by focusing on common goals, priorities, and challenges. Stress the benefits of teamwork: different perspectives on old issues, creativity, an expanded network, a better outcome. Treat each meeting as a chance to celebrate team successes. Cite examples of how people on your team have worked together to solve problems, improve performance, or achieve results. Encourage naturally competitive people to

channel it toward the external competition instead of inside the team. Remind people that you're all on the same side. Promote a sense of belonging by saying: "Our objectives," "Our challenges," "Our solutions," "We did it."

Want to learn more? Take a deep dive...

Hall, H., & Thompson, B. (2012, March 30). The secret sauce of teamwork. *Harvard Business Review Blog Network*.

Hall, J. (2013, January 29). 12 Simple things a leader can do to build a phenomenal team. *Forbes*.

- 7. Want higher performance? Go for higher-impact communication.** Research scientists at MIT collected loads of data on teams outfitted with electronic sensors. They found that the most important predictors of a team's success were patterns of communication (more than intelligence, skill, and personality combined). It was the manner in which teams communicated—not the content—that made the biggest difference, such as more face-to-face exchanges; exuding energy when communicating; balancing listening and speaking; using brevity; engaging directly with many others on the team, not just with the team leader or a select few; talking between meetings; making frequent connections outside the team and incorporating fresh input that's been picked up. Bottom line? Orchestrate ways for people to interact more often, making sure everyone is involved and dialogue keeps circulating.
- 8. All work and no play? Build team spirit.** Even though some—including you—may resist it, social events like parties, group charity work, activities, and outings build group cohesion. Cohesion is about what makes you bond or stick together during good times and bad. There's good chemistry. The team feels it and those outside the team sense it. Chemistry can be instant, but it usually comes from mixing together, through challenge and fun, on and off the job. Research tells us cohesive teams are more productive too—another reason to take fun seriously. Make it easy for team members to get to know each other as whole people. When you laugh together, it releases stress, builds trust, and opens up ways to solve problems more creatively.
- 9. Losing momentum? Monitor and publicize short-term wins.** Long-term goals/visions are an important part of inspiring others, but if these are the only carrots, progress toward your vision will lose traction. You need momentum, and you can create momentum by recognizing short-term progress and making it visible. Lessons learned through hardship are also wins if you make "failing forward" part of the team's DNA. This means talking openly about mistakes, turning them into stepping stones toward achievement so everybody can learn.
- 10. Have virtual team challenges? Keep them connected and motivated.** Virtual teams are everywhere now. A sense of isolation and maintaining morale are common challenges, so dial up on tactics to stay well connected. Frontload face-to-face time when possible. Schedule frequent conference calls. Leverage multiple technologies (videoconferencing, groupware, etc.). If dispersed members dial in to large meetings, be sure to interact with them. Schedule off-line one-on-one contact for deeper conversations, mindful that e-mail and texting are the least effective forms of communication for virtual teams. Be extra sensitive to cultural differences or language barriers—things may be misconstrued when there isn't a way to decipher non-verbals and check for understanding. Create an expertise directory or webpage to showcase the diverse capabilities of the team. Include non-work aspects, such as the person's hobbies or interests, to strengthen bonds.

Want to learn more? Take a deep dive...

Llopis, G. (2013, September 23). 6 Ways to make your leadership and workplace fun again. *Forbes*.

Moran, G. (2013, March 13). 3 Ingredients for building effective teams. *Entrepreneur*.

11. **Tension brewing? Strengthen trust through mutual accountability.** Trust is the foundation of effective teams. You need to know you can rely on each other to follow through. When that doesn't happen and trust begins to erode, the antidote is candid conversation. Team members—not just the leader—need to let each other know when they've been let down. Describe the consequences when someone doesn't deliver. Call each other on actions that seem counterproductive. Clarify expectations and agree on productive next steps. You'll know that trust is strengthened when people admit shortcomings and ask for help before their teammates mention it.
12. **Not benefiting from diverse views? Practice perspective-taking.** Could be that even after you've selected team members for their diverse value, you still get too much sameness. Could be that those with minority views are just quiet. Could be they're snuffed out. Be assertive and gather input from everyone, not just the dominant players. Ask for different ways to frame a problem. If an idea initially seems ridiculous, get curious instead of judgmental. "Tell us more." Play out various "what ifs" and "how abouts." Encourage people to question assumptions and poke holes in solutions. Make perspective-taking a habit to sharpen the team's mind and arrive at better outcomes. You'll also boost morale, because everyone wants to be heard and understood.
13. **Arguments heating up? Referee unproductive infighting.** Passionate debates are good for a team and generally get out information and ideas that might remain hidden. These should not be stifled. But do monitor the degree of heat and jump in early if people are headed toward personal attacks that are counterproductive. Steer the focus to the task or process issues that are causing conflict. If personal attacks occur or feelings are hurt, let things chill a bit. Then get both sides together to speak their minds. Remind them not to take things personally (e.g., "both sides presented good arguments and the team would not have made an informed decision if we hadn't viewed the issue from all sides"). Redirect the energy toward common goals and productive next steps.

Want to learn more? Take a deep dive...

The HR Specialist. (2012, February 29). Team dysfunction: Why it happens and how to fix it. *Business Management Daily*.

Zwilling, M. (2010, July 26). *How the best bosses foster team accountability*. Business Insider.

14. **The team losing its spark? Prioritize continuous learning and development.** Development is motivating and productive. Provide team members with challenging assignments that are in sync with their career aspirations and also accelerate the team's progress. Who can mentor whom to grow knowledge and expertise? Provide training or coaching to help the team collaborate better, like learning problem-solving or idea-generating techniques. Gain insights together with trips to see customers. Conduct periodic team assessments—even if things are going pretty well, the best like to keep getting better. Try making a list of 10 key factors of team effectiveness. Have each person indicate whether they think it's a strength, OK, or

area for improvement. Tally up the scores, talk it through, and decide how to leverage strengths and address weaknesses.

- 15. Strong headwinds? Ensure organizational support for teams.** No team is—nor should be—an island. Develop strong relationships with leaders, sponsors, stakeholders, and other groups for necessary information, technology, resources, collaboration, and troubleshooting. Influence people to get *team* efforts rewarded more than individual achievements—through recognition and other incentives. On a broader scale, when attracting and promoting talent, go for those with a track record and motivation to excel in team settings.

Want to learn more? Take a deep dive...

Ashkenas, R. (2010, May 11). How to build an A-team from day one. *Harvard Business Review Blog Network*.

Wolski, C. (2013). Factors that promote effective teamwork. *Chron*.

Job Assignments Specific to Your Role

- Assemble a team of diverse people to accomplish a difficult task that requires collaboration and creative thinking. Agree on purpose, goals, roles, and a structure that best supports the team's work.
- Coach a team or department that is demonstrating lack of trust, split focus, or suboptimal performance.

Additional Job Assignments

- Be an active member of a virtual team, ensuring all members stay connected, motivated, and productive.
- Work on a team handling a high-stakes business issue, where you will need to share information and make sense of it quickly.
- Lead a community project team outside the workplace, practicing teaming skills you want to improve. Gather feedback from members of the project team, then apply the feedback on the job.

Take time to reflect...

If you like to go it alone...

...then understand the benefits to be gained from pulling people together. Encourage mutual support. Build a sense of commitment and cooperation. Instill this in the team and become more comfortable with it yourself.

If your long-standing team works just fine the way it is...

...then ask yourself is it effective, or does it just feel good? Is it actually performing or just a comfortable place to be? A positive team atmosphere is only great when team results are also great.

If you think every group is automatically a team...

...then recognize that teams have to be formed and nurtured. It takes effort, commitment, alignment, and a great deal besides. Teamwork doesn't happen by accident; it happens by design.



Learn more about *Builds effective teams*

- Duke Corporate Education. (2005). *Building effective teams (leading from the center)*. Chicago, IL: Dearborn Trade Publishing.
- Grimshaw, J., & Baron, G. (2010). *Leadership without excuses: How to create accountability and high performance (instead of just talking about it)*. New York, NY: McGraw-Hill.
- Lencioni, P. (2005). *Overcoming the five dysfunctions of a team: A field guide for leaders, managers, and facilitators*. San Francisco, CA: Jossey-Bass.
- Miller, B. C. (2004). *Quick team-building activities for busy managers: 50 Exercises that get results in just 15 minutes*. New York, NY: American Management Association.
- Vebeck, M., & Williams, P. (2005). *Fun is good: How to create joy and passion in your workplace and career*. Emmaus, PA: Rodale, Inc.



Deep dive learning resource links

- Ashkenas, R. (2010, May 11). How to build an A-team from day one. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2010/05/how-to-build-an-a-team-from-da/>
- Hall, H., & Thompson, B. (2012, March 30). The secret sauce of teamwork. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/03/the-secret-sauce-of-teamwork/>
- Hall, J. (2013, January 29). 12 Simple things a leader can do to build a phenomenal team. *Forbes*. Retrieved from <http://www.forbes.com/sites/johnhall/2013/01/29/team-building-leader/>
- The HR Specialist. (2012, February 29). Team dysfunction: Why it happens and how to fix it. *Business Management Daily*. Retrieved from http://www.businessmanagementdaily.com/29865/team-dysfunction-why-it-happens-and-how-to-fix-it#_
- Llopis, G. (2013, September 23). 6 Ways to make your leadership and workplace fun again. *Forbes*. Retrieved from <http://www.forbes.com/sites/glennllopis/2013/09/23/6-ways-to-make-your-leadership-and-workplace-fun-again/>
- Moran, G. (2013, March 13). 3 Ingredients for building effective teams. *Entrepreneur*. Retrieved from <http://www.entrepreneur.com/article/226063>
- Wolski, C. (2013). Factors that promote effective teamwork. *Chron*. Retrieved from <http://smallbusiness.chron.com/factors-promote-effective-teamwork-1932.html>
- Young Entrepreneurial Council. (2013, June 7). Five ways to build an effective team. *Forbes*. Retrieved from <http://www.forbes.com/sites/theyec/2013/06/07/five-ways-to-build-an-effective-team/>
- Zwilling, M. (2010, July 26). *How the best bosses foster team accountability*. Business Insider. Retrieved from <http://www.businessinsider.com/how-the-best-bosses-foster-team-accountability-2010-7>

Recommended search terms

If you'd like to explore *Builds effective teams* further, try searching online using the following terms:

- Building effective teams.
- Building team capabilities.
- Overcoming team dysfunction.
- Team accountability.

Instills Trust

Gaining the confidence and trust of others through honesty, integrity, and authenticity.

Trust lies at the heart of effective relationships. Whether in or out of the workplace, trust generates feelings of goodwill. It enables successful collaboration and more productive outcomes. When there's trust, things go more smoothly. People pull together, relying on each other to do their part. They're better able to work through conflicts and tough times. Without trust, there are unnecessary speed bumps, heightened doubt, dips in performance. Being trustworthy is about being honest and authentic. It's about acting with integrity. Showing consistency. Being credible. If you're trusted, it means others can count on you to deliver and to look after their highest interests. Trust is based on reciprocity—you need to give it to get it.

“No legacy is so rich as honesty.”

William Shakespeare – English playwright and poet

Skilled

Follows through on commitments.

Is seen as direct and truthful.

Keeps confidences.

Practices what he/she preaches.

Shows consistency between words and actions.

Less skilled

- Lacks consistent follow-through on commitments.
- Betrays confidences and covers up mistakes.
- Misrepresents facts for personal gain.
- Has trouble keeping confidences.
- Makes promises but doesn't always keep them.

Talented

- Gains the confidence and trust of others easily.
- Honors commitments and keeps confidences.
- Expresses self in a credible and transparent manner.
- Models high standards of honesty and integrity.

Overused skill

- May push openness and honesty to the point of being disruptive.
- May come across as overly judgmental of those not quite as overtly authentic.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *instills* trust. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Lacks follow-through.
- Guarded; holds back.
- Won't admit mistakes.
- Breaks confidentiality.
- Overpromises.
- Doesn't "walk the talk."
- Puts self-interests first.
- Avoids sharing information.
- Bends the rules.
- Unclear about own values.



Brain booster

Neurochemistry can shed some light on how to build trust and foster a sense of team, which can lead to greater productivity. There are some basic sources of stress that decrease trust, undermine relationships, and reduce productivity:

- Being evaluated by others in a work setting.
- Being evaluated by others in a social setting.
- Rejection.
- Unfairness.
- Dealing with ambiguity and uncertainty.
- Delivering results under pressure.

Obviously, many of these are an inherent part of living and working in the 21st century. While providing feedback to help people grow can build trust, constantly scrutinizing people's work can erode it. Find the right balance. If you can reduce these stress triggers among your team members, you will be able to reduce cortisol levels, have happier, healthier, more relaxed and more productive team members. Encourage team members with positive comments. Build a sense of community and cohesion so that no one feels like an outsider. Be fair. Help people find answers to questions that are preventing them from getting their work done. And, when you don't have the answers, help team members define what they do have control over, what choices they can make. Finally, in a time of doing more with less, be compassionate about how much you are expecting and ask yourself how you can do a better job of balancing how realistic and ambitious your expectations are.^{56, 57}

Tips to develop *instills* trust

1. **Failing to deliver? Be more reliable.** People rely on each other to follow through on their commitments. To meet deadlines. To contribute their fair share. The research of Mishra and Mishra shows that reliability is one of the quickest ways you can demonstrate trust. You can show it during your first meeting with someone by being on time. By returning calls. By passing on information you promised to send. By giving

people a “heads up” if circumstances have changed or trouble is brewing. Failing to do these things damages relationships and decreases productivity. If following through isn’t your strength, identify the main reasons and address them. If you tend to forget, write things down or set up alerts on your smartphone. If you’re often running behind, work on better time management. At the beginning and end of each day, review the commitments you’ve made and decide when you’ll follow through.

2. **Trouble with consistency? Align your words and actions.** Probably nothing chills trust more than a person saying one thing and doing something else. People want consistency. You can deliver an inspiring message with convincing calls-to-action. But, if the next day you do something quite contrary, people may no longer buy it. Worse yet, they may question your credibility. Having integrity means representing yourself accurately. Knowing who you are. What you believe. And practicing what you preach regardless of the setting. If you’re not sure if there’s a gap between your words and deeds, ask someone you trust to give you feedback. Then you can begin to close any gaps.
3. **Withholding too much? Share more openly.** Do you often keep things to yourself? Tend to hold back information or opinions? Err on the side of non-disclosure? It may not be your intention, but people around you may begin to wonder. Wonder what you’re up to, what your agenda is, whether you’re hoping to gain an advantage over them. Why aren’t you sharing more openly? It may be that you have a reserved nature or prefer privacy. Or that you don’t want to lose control or appear less authoritative. Regardless of the reasons, it may be time to make some adjustments. Organizations function on the flow of information. Greater transparency is expected at all levels, in and outside the firm. So find out what people want and need to know and begin to comply. Sending information on relevant topics is a start. Better still, talk or meet with people for open, two-way exchanges. Practice showing and telling it like it is.
4. **Trying too hard to impress? Don’t exaggerate or overpromise.** Does your enthusiasm to make the sale or win approval cause you to commit to too many things? Do you stretch the truth? Say “yes” to a stakeholder or customer request by default? The customer you gain by overpromising is the customer you may lose forever when they find out you can’t deliver. Word spreads quickly. When doubts are raised, customers go on guard—not sure they’ll believe the next thing you say, ready to shift their loyalty somewhere else. Reflect a bit on when and where you tend to exaggerate. Is it under most circumstances or when the pressure is particularly intense? Were you rewarded for it in another setting? Is it serving you well now? Observe your patterns and begin adjusting your approach. Be authentic—we’re in an era when truth carries greater weight than fiction. Don’t promise something unless you can deliver. If you don’t know for sure, say, “I’ll look into it and get back with you when I do.”
5. **Unable to meet expectations? Grow your capability.** If someone isn’t trusted, it’s not necessarily about a lack of honesty or integrity. It might be that people lack confidence in your ability to perform your job well. To meet or exceed requirements. To execute at the top of your game. As a result, they probably feel on edge, especially if their success depends on your contribution. If more than one colleague is checking up on you, questioning your judgment or skill, it may be a wake-up call. Conduct an inventory of your strengths and weaknesses. Gather feedback from a variety of people and work to gain skill where you’re not measuring up.

Want to learn more? Take a deep dive...

Graybill, M. (2013, August 8). *Leadership fundamentals: Transparency and trust*. About Leaders.

Llopis, G. (2012, September 10). 5 Powerful things happen when a leader is transparent. *Forbes*.

Scott, S. (2011, June 30). TEDxOverlake – Susan Scott – The case for radical transparency [YouTube].
TED

6. **Difficulty admitting mistakes? Take responsibility.** Everyone makes mistakes. It's how you deal with them that determines whether or not people view you as trustworthy. History is full of examples where the cover-up of a mistake does more damage than the original misstep. Resist any temptation to hide it, deny it, play dumb, or blame someone else. Apologize with sincerity. Admit when you were wrong as soon as you can, informing everyone who may be affected. Offer to help with workarounds or potential repercussions. Share what you learned and what steps you'll take to prevent it from happening again. When someone's feelings have been hurt, trust is particularly fragile, so take time to talk things through. It's never too late to repair a damaged relationship. Come to terms with your part in the situation. Take steps to rectify things. Finally, move on. Dwelling on past mistakes distracts you from doing your best now.
7. **Tempted to spread someone else's news? Maintain confidentiality.** Some people are viewed as untrustworthy because they've shared information intended to be kept confidential. Revisit what keeping a confidence means. Some guidelines: Ask up front, "Is this to be kept confidential?" "Is this mine to share?" Don't let social media norms sway you—always keep personal information someone shares to yourself. Read and follow your organization's guiding principles. If someone shares legal or ethical breaches, let them know you can't promise confidentiality on those topics. If you learn information that might compromise people's safety, there is also no guarantee of confidentiality. In most cases, apply the golden rule—would you want someone to pass it on if you had shared it? If you're not sure, ask. It doesn't take many slip-ups before people say you can't be trusted with confidential information. Err on the side of discretion.
8. **Lacking an ethical compass? Take corrective action.** People rarely start their careers planning to be unethical. More often it comes about slowly. Occasionally taking home office supplies, fudging numbers on an expense report. It might spread—condoning unfair treatment of employees, using lower quality parts that could jeopardize product safety, keeping silent about corruption or fraud. There are countless ways to rationalize unethical choices: *Everyone else is doing it. Nobody will find out. My boss told me to. It's not exactly illegal. The end justifies the means. We didn't have time to check. It won't hurt anybody.* Review and comply with the ethical codes provided by your organization and profession. But don't stop there—identify your own code of conduct. What values will you choose to uphold? What lines will you refuse to cross? Work with leaders to incorporate practices to detect and report missteps. Talk about how to handle "gray zones," where there are no easy answers. How to do what is right, even if it's unpopular. How to surface conflicts of interest. What may seem minor at the time can ripple out, harming the reputations of both individuals and organizations.

Want to learn more? Take a deep dive...

Bailey, S. (2013, May 15). Business leaders beware: Ethical drift makes standards slip. *Forbes*.

Guest, G. (2013, May 1). *Workplace ethics rub off on employees*. Futurity.org.

Pastin, M. (2013, November 11). The different ways people handle ethical issues in the workplace. *Bloomberg Businessweek*.

- 9. Perceived to be self-centered? Put the team or organization first.** Do others sense you care more about your own agenda than the larger group's? If so, they may doubt whether you'll operate in their best interests. Shuffle and prioritize the team. Talk about what "we" have accomplished—not "I" or "me." Recognize others' contributions and spread credit where it's due. Research shows you can also build trust through self-sacrifice. This means doing things that postpone your own interests, privileges, or rewards for the benefit of the group. Like working overtime with the team to finish a task. Giving up your weekend or holiday to meet a deadline. If you're a leader with status, it could mean relinquishing your large office when space is tight. Or taking a pay cut during challenging times. Research shows that trust built through self-sacrifice can have a long-term positive impact.
- 10. Lack of trust between groups? Build cross-boundary bridges.** Sometimes trust is high for people *within* a team or department, but not *between* groups or functions. Maybe there's a long history of "us vs. them." Maybe something recent has caused friction. Maybe you stereotype each other. Or just don't know each other. To better coordinate efforts and leverage synergies, foster cross-boundary trust. Find out what's causing any past or current problems. If your team hasn't delivered the goods, decide how you'll fix things to build credibility. If the others have fallen short, clarify what's needed going forward. In all cases, look for ways to connect. Identify common objectives and values. Share resources, expertise, information. Collaborate to solve problems and drive new initiatives. Incorporate getting-to-know-you time in neutral settings. Make use of what the authors of *Boundary Spanning Leadership* call "attractor spaces"—informal community spots like libraries or cafés that encourage relationships to form spontaneously. Become a self-appointed bridge-builder, forging intergroup trust.
- 11. Sense trust may be eroding? Pay attention to warning signs.** Keep alert to signs that trust may be breaking down in your department or team. Are people talking about one another behind their backs? Are they withholding information or resources? Are they undermining each other to make themselves look good? Stifling authentic feelings about issues? Do some members cast blame or criticism unfairly? Do people feel compelled to cover their tracks? Do decisions get made during sidebar conversations or in cliques? Trust takes a long time to build and can deteriorate rather quickly. Don't just wait and see what happens. Directly confront warning signs with the group. If things are especially tense, ask a facilitator or coach to help the group get back on track through a series of candid conversations.
- 12. Reluctant to bring your heart to work? Show genuine concern for people's needs.** Many think the workplace should be all about business. That compassion doesn't belong. In reality, a culture of caring is good for business—it strengthens trust and collaboration. Showing you care goes beyond remembering someone's birthday. For a trust-based relationship to flourish, there needs to be mutual concern for what matters to the other person. Listen closely to discover what that is. Even five minutes of focused, quality time can go a long way. Involve people in decisions that are important to them. Ask what you can do to help them. Follow up. When times are tough, be even more accessible, providing empathy and support.

Want to learn more? Take a deep dive...

Bryant, A. (2011, July 30). The trust that makes a team click. *The New York Times*.

Clark, D. (2012, March 28). Five ways to become a better team player. *Forbes*.

Voortman, P. (2013, May 23). Trust in organisations: Pauline Voortman at TEDxRadboudU 2013 [YouTube]. TED.

Job Assignments Specific to Your Role

- Mediate a conflict between two people or teams, where you'll need to gain the trust of both parties and facilitate an honest discussion leading toward resolution.
- Teach a leadership or orientation course session on your organization's code of ethics, including discussion on how to show integrity and handle challenging dilemmas.
- Lead a team or group that is experiencing resistance due to a change that was imposed upon them (e.g., new structure, downsizing, personnel change); practice restoring trust between the groups.

Additional Job Assignments

- Make peace with a colleague or customer you've disappointed in the past, apologizing for any mistakes and taking steps to renew trust.
- Be a liaison or spokesperson for your organization in the local community, requiring you to instill trust while addressing the concerns they have related to your company's practices.

Take time to reflect...

If you're concerned that others don't have full trust in you...

...then find out why and take clear action to turn things around. Do the right thing—always. Be patient. Trust cannot be claimed; it needs to be earned.

If you talk a good story but don't follow through...

...then be aware that people will soon lose confidence if they hear the words but don't see the action. Demonstrate your commitment right through to the end result.

If you sense that gossip is running rampant...

...then understand that allowing negative "hearsay" can lead to a culture of distrust. Address rumors with speed and honesty. Focus on the underlying reasons.



Learn more about *Instills* trust

Boyatzis, R. E., Smith, M., & Blaize, N. (2006). Developing sustainable leaders through coaching and compassion. *Academy of Management Learning & Education*, 5(1), 8-24.

Covey, S. M. R., & Merrill, R. R. (2006). *The speed of trust: The one thing that changes everything*. New York, NY: Free Press.

Dobrin, A. (2002). *Ethics for everyone: How to increase your moral intelligence*. New York, NY: John Wiley & Sons.

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- Reina, D. S., & Reina, M. L. (2010). *Rebuilding trust in the workplace: Seven steps to renew confidence, commitment, and energy*. San Francisco, CA: Berrett-Koehler.
- Rock, D. (2009). *Your brain at work: Strategies for overcoming distraction, regaining focus, and working smarter all day long*. New York, NY: HarperCollins Publishers.
- Solomon, R. C., & Flores, F. (2001). *Building trust: In business, politics, relationships, and life*. New York, NY: Oxford University Press.
- Tracy, D., & Morin, W. J. (2001). *Truth, trust, and the bottom line*. Chicago, IL: Dearborn Trade.



Deep dive learning resource links

- Bailey, S. (2013, May 15). Business leaders beware: Ethical drift makes standards slip. *Forbes*. Retrieved from <http://www.forbes.com/sites/sebastianbailey/2013/05/15/business-leaders-beware-ethical-drift-makes-standards-slip/>
- Bryant, A. (2011, July 30). The trust that makes a team click. *The New York Times*. Retrieved from http://www.nytimes.com/2011/07/31/business/siemens-ceo-on-building-trust-and-teamwork.html?pagewanted=all&_r=0
- Clark, D. (2012, March 28). Five ways to become a better team player. *Forbes*. Retrieved from <http://www.forbes.com/sites/dorieclark/2012/03/28/five-ways-to-become-a-better-team-player/>
- Graybill, M. (2013, August 8). *Leadership fundamentals: Transparency and trust*. About Leaders. Retrieved from <http://www.aboutleaders.com/leadership-fundamentals-transparency-and-trust/>
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- Llopis, G. (2012, September 10). 5 Powerful things happen when a leader is transparent. *Forbes*. Retrieved from <http://www.forbes.com/sites/glennllopis/2012/09/10/5-powerful-things-happen-when-a-leader-is-transparent/>
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- Scott, S. (2011, June 30). TEDxOverlake – Susan Scott – The case for radical transparency [YouTube]. TED. Retrieved from <https://www.youtube.com/watch?v=oVKaXUB4EFg>
- Voortman, P. (2013, May 23). Trust in organisations: Pauline Voortman at TEDxRadboudU 2013 [YouTube]. TED. Retrieved from https://www.youtube.com/watch?v=Z-HY2mdm_JI

Recommended search terms

If you'd like to explore *Instills* trust further, try searching online using the following terms:

- Building trust in the workplace.
- Business ethics.
- Personal integrity in business.
- Reliable employee performance.
- Transparent leadership.

Drives Vision and Purpose

Painting a compelling picture of the vision and strategy that motivates others to action.

When faced with ongoing uncertainty and change, people look for something they can hold on to. Believe in. Aspire toward. They want to know that what they do matters. That they're contributing to something worthwhile. Larger than themselves. A sound purpose and inspiring vision—whether for an organization, team, project, or initiative—fuel commitment and unify efforts. People are more engaged when they understand how what they do connects to the big picture. They make better decisions when they know where they're headed. They're more resilient when setbacks occur, knowing they're on the right path. To influence others to pursue a meaningful direction, create a vision of the future you want to achieve together. A future that captivates the group's imagination. If that vision isn't inspiring to you on a personal level, it won't light any fires in others either. If you are passionate about the purpose, about closing the gap between current reality and the future you desire, you still need to find a way to ignite that passion in others. Shape and deliver a message that appeals to the core interests and values of your audience. But words alone aren't enough. You need to demonstrate your commitment to the purpose and vision you espouse. This will inspire others to show their commitment as well.

"If one does not know to which port one is sailing, no wind is favorable."

Seneca – Roman philosopher and statesman

Skilled

Talks about future possibilities in a positive way.

Creates milestones and symbols to rally support behind the vision.

Articulates the vision in a way everyone can relate to.

Creates organization-wide energy and optimism for the future.

Shows personal commitment to the vision.

Less skilled

- Fails to personally connect with the organization's vision.
- Has difficulty describing the vision in a compelling way.
- Can't simplify enough to help people understand complex strategy.
- Struggles to energize and build excitement in others.

Talented

- Articulates a compelling, inspired, and relatable vision.
- Communicates the vision with a sense of purpose about the future.

- Makes the vision sharable by everyone.
- Instills and sustains organization-wide energy for what is possible.

Overused skill

- May lack follow-through to execute the vision.
- Communicates at a high level too often.
- May lack patience when others don't share the same vision and sense of purpose.

Some possible causes of lower skill

Causes help explain *why* a person may have trouble with *Drives* vision and purpose. When seeking to increase skill, it's helpful to consider how these might play out in certain situations. And remember that all of these can be addressed if you are motivated to do so.

- Not possibility oriented.
- Resists change.
- Doesn't relate well with others.
- Lacks ambition.
- Ineffective communicator.
- Stuck in the past.
- Doesn't show emotion or passion.
- Lacks authenticity.
- Not focused or committed.



Does it best

Half a century ago, Lee Kuan Yew, former Singaporean prime minister, often referred to as the father of modern Singapore, had a vision for what was possible in his country. Lee's "big idea" was that, in order for Singapore to realize its potential, the citizens would first need a prosperous livelihood and have a sense of nationalism. One thing Lee did immediately was to compel citizens to adopt English as their working language. This helped forge a unified society and laid the foundation to unite the island's many different ethnic groups. Lee wanted to instill in his fellow Singaporeans a sense that they all shared a future, in his words, that "if Singapore goes down everyone goes down."

Through Lee's vision, Singapore has been transformed from a fishing village with a port to an intellectual and technical center of the region. Due in large part to his leadership, per capita income has grown from about US\$400 a year to close to US\$40,000. What was a medium-sized city has become a significant international and economic player.^{58, 59}

Tips to develop *Drives* vision and purpose

1. **Individuals unclear about how they fit in? Connect work to the big picture.** Understanding the vision is important for people in every role. Draw the link between your goals, projects, and deliverables and the organization's destination. Initiate conversations with peers and leaders. Get clear about how what you do moves the organization toward its vision. Get clear about how your efforts activate the strategy directly or indirectly. Get clear about how the vision fits into the larger context of your industry and society. Articulate

why this matters to you personally and professionally—purpose and passion fuel individual and group performance. Discuss upcoming initiatives that don't fully align with the vision. What adjustments need to be made? Outline the specific actions you'll take to remove obstacles and drive the vision forward.

2. **Missing a sense of purpose? Inquire about peak experiences.** An effective way to uncover or revive a sense of purpose in a group or organization is through a process originally developed by David Cooperrider called "Appreciative Inquiry." It involves asking about the best of what already exists and finding ways to build upon that. Through surveys or dialogue, ask people to (1) Reflect on times that stand out as being a high point in their work with the organization or team—when they felt the most alive, effective, or really proud of their involvement. (2) Identify three things they appreciate about the organization/team that they'd like to maintain going forward. (3) Describe what they want the organization/team to look like in the future. Then gather the varied responses and cluster them around key themes. Identify the core values and shared sense of purpose. Talk about how to leverage, communicate, and reinforce these throughout the organization/team.
3. **Confusion about what's critical? Craft a clear mission statement.** A mission statement is a short description of the purpose of an organization, team, or individual. It answers the fundamental questions: Why do we exist? How do we add value? Effective purpose statements are clear and concise. They signal what's mission critical. They help people decide how to allocate time, energy, and resources. They often follow a simple framework, e.g., "Our mission is to _____ for _____ so that _____." For example, "Our mission is to provide nutritious, delicious snacks for active families so that health and taste aren't compromised when people are on the go." Or "Our team's purpose is to deliver zero-defect parts so that customers receive the highest standards in safety and reliability." The tone of your mission should reflect your unique identity, culture, or style. Above all, the statement should be meaningful for those who adopt it. Write a draft, then ask others for suggestions on how to improve it.
4. **Vision too long or complex? Keep it simple.** A vision is what you or the organization aim to become in the future. Your destination. The best visions are concise, clear, and compelling. Try to articulate your vision in no more than two to three minutes. Even shorter sound bites work well for quick conversations. The vision should make sense rationally and draw people in emotionally. It should be clear enough that people know when it's reached. It should be compelling enough that people mobilize to make it happen. Vision is about where you are going—not about how you will get there. Whet people's appetite with your vision so they understand it. Then ask them to help you realize it.

Want to learn more? Take a deep dive...

Baskin, E. (2014, January 6). *To align employees, keep the vision simple – and unique to your culture.* Good Company.

Frost, S. (n.d.). How to align employees with company goals. *Chron.*

Mind Tools. (n.d.). *Appreciative inquiry: Solving problems by looking at what's going right.* Mind Tools.

Tabaka, M. (2010, August 24). 3 Steps to make your vision work for you. *Inc.*

5. **Not connecting well with people? Tailor the message to match the audience.** You may have a clear picture of the future in your own mind, but it won't do you any good unless you can paint that picture for others. A one-size-fits-all delivery usually isn't the answer. While keeping the essence of the message intact, adjust your language and style to suit particular groups. What's their background? How much do

they know about the topic? What would motivate them to embrace the vision? Object to it? How might someone from finance relate to it differently than someone from IT or marketing? A new hire vs. a board member? Your own team vs. an external party? Is the setting formal or informal? When in doubt, skip the jargon and use language people easily understand. Your approach should be determined by the other person or group, not by your own preferences.

- 6. Your words falling flat? Communicate with charisma.** You may have been told that you aren't inspiring enough. That your words don't captivate. That you should show more charisma. Some think you need to be born with charisma—that it cannot be developed. Researchers at the University of Lausanne have found that it can. They've identified twelve key tactics that when practiced and adopted, help listeners remember and relate to a message. They also cause speakers to be viewed as more credible and trustworthy leaders. Nine of the twelve are verbal and three are non-verbal. They are: (1) Metaphors and analogies. (2) Stories and anecdotes. (3) Contrasts (e.g., "it's not about what you'll get, but about what you can give"). (4) Rhetorical questions. (5) Three-part lists. (6) Expressions of conviction and integrity. (7) Showing empathy. (8) High goals. (9) Conveying confidence that goals can be attained. (10) Animated voice. (11) Facial expressions. (12) Gestures. The tactics help create emotional connections whether used with a group or in one-to-one conversations. (See Antonakis, Fenley, and Liechti, 2012.)
- 7. Not appearing consistent? Align your words and actions.** Probably nothing chills trust more than a person saying one thing and doing something else. You can deliver an inspiring vision. Speak eloquently of future possibilities. But if the next day you do something that undermines your words, people may no longer buy it. They may question your vision and your credibility. Show integrity by representing yourself accurately. Be authentic about who you are. What you believe. And practice what you preach, regardless of the setting. If you're not sure if there's a gap between your words and deeds, ask someone you trust to give you feedback. Then you can begin to close any gaps.
- 8. Meeting resistance? Be prepared for skeptics.** There will always be those who don't buy your vision. They may be private about it or come at you in public. Be prepared to answer the 10 most likely questions/critiques that may surface. "Is this realistic? Our customers won't go for it. Where will we get the resources?" Write out your answers and rehearse how you'll respond. Listen patiently to people's concerns—there may have been a time when you weren't convinced this was the way to go either. They may simply want to protect the organization's best interests. Approach resistance as a positive thing. If you handle questions openly, others will feel free to voice their concerns. It's better to have the issues on the table than to have them fester below the surface. Empathize with people. If more dialogue is needed to get on the same page, welcome it. Contrary opinions may ultimately strengthen the vision. If resistance becomes entrenched and people won't collaborate, reinforce why the vision has merit and the timing is now. Occasionally, you may have to pull someone aside and say, "I understand your concerns, but we're moving on. Are you with us or not?"

Want to learn more? Take a deep dive...

Chappelow, C. (2012, September 5). 5 Rules for making your vision stick. *Fast Company*.

Genard, G. (2012, March 25). *4 Easy ways to become a more charismatic speaker*. Public Speaking International.

Harrison, C. (2007, December). *Who's your audience? Ways to win your audience through inclusion*. Toastmasters International.

Kaipa, P. (2012, July 2). Recover your credibility. *Harvard Business Review Blog Network*.

- 9. Team losing its forward momentum? Envision team success.** To help team members embrace new possibilities, engage them in a visioning exercise. Ask the team to picture completing its work and successfully reaching its goals. What does the future state look like? How do customers/stakeholders feel? What actions do they take? What did the team do to be successful? What did it avoid doing that could have been a barrier? What were the tangible and intangible rewards of working together to realize the vision? Then discuss and log what the team specifically wants to start, stop, and continue doing to be more effective. Identify some quick wins you can achieve to build momentum. Come up with an image, symbol, or slogan that inspires the team and can serve as a reminder. Monitor your progress and hold each other accountable for achieving your shared vision.
- 10. Want to rally people around an opportunity? Add urgency.** Change expert John Kotter advocates showing a high degree of “strategic fitness” when it’s vital to jump on opportunities quickly. Strategic fitness means being able to act faster, more nimbly, more creatively to what’s new. A well-crafted vision can accelerate your efforts. It can create a sense of urgency around a high-stakes opportunity. Get people excited about what’s possible. In the vision, vividly portray what success looks like. Include a time frame that’s ambitious yet attainable. Then encourage people to step up and participate. Recognize those who galvanize others to get involved. Notice how people embrace the vision and make it their own. Socialize catchphrases that go viral. Keep the urgency going. Remove barriers. Communicate and celebrate wins from the start.
- 11. Experiencing roadblocks? Show optimism and persevere.** Your vision may not materialize at the pace you want. It may be sidetracked by problems or unforeseen events. The destination may no longer seem feasible. But doom and gloom forecasts do little to rouse energy needed to achieve a vision. So make a conscious effort to address difficulties without letting them drag you down. Talk about what you’ve learned from setbacks. Use delays as opportunities to regroup and reinvigorate. Then get back to work. According to the research of Angela Duckworth, showing “grit”—sustained interest and effort toward long-term goals—is a primary predictor of success. Grit surpassed intelligence and talent as key for achievement in a wide variety of contexts—business, the military, education. Work hard to make your *vision* a reality.
- 12. Vision fading? Keep it in focus.** Given all the things that compete for attention, even a compelling vision may fade into the background. Make sure it stays at the forefront. Reinforce it repeatedly. Refer to it in meetings, updates, videos, conversations. Create a memorable symbol, slogan, or image of the vision that makes the cause come alive. Something that captures the imagination. Conjures up exciting possibilities. Set up a friendly competition or get others involved in creating it so more people are invested. Use visual scorecards—such as dashboards or thermometers—to show progress toward realizing the vision. Regularly share stories that illustrate progress. Reward those who move the needle in the desired direction.

Want to learn more? Take a deep dive...

Barón, M. (2013, August 28). *Top tips for creating a clear vision for your business*. Small Business UK.

Kotter, J. (2011, April 27). The biggest mistake I see: Strategy first, urgency second. *Forbes*.

Moss Kanter, R. (2012, October 23). 12 Guidelines for deciding when to persist, when to quit. *Harvard Business Review Blog Network*.

Spiro, J. (2010, August 30). How to get employees excited about your business vision. *Inc.*

Job Assignments Specific to Your Role

- Prepare and present a strategic proposal to the Board or Executive Committee that involves a change in direction and a request for sponsorship and resources.
- Assist a floundering team or Clubhouse in developing a clear sense of purpose and a compelling vision for the future.

Additional Job Assignments

- Be a change agent for a new process, product, or service. Create a symbol for the change and champion it through to implementation.
- Take a strategic assignment that involves charting new ground and communicating the vision to a critical audience.
- Lead or be a team member on a start-up that requires creating a team charter to unify, focus, and inspire the team.

Take time to reflect...

If you see that people are not tracking with your message or with the strategy overall...

...then emphasize the importance of being as one. Bring into focus the purpose that everyone has in common. The goals you all share. The customers you all serve. The future you are trying to create.

If you sense that excitement about the strategy is losing steam...

...then relight the fire. Bring the mission to life. Create milestones for people to rally around. Celebrate successes along the way. Build enthusiasm for goals that everyone buys into.

If you feel people don't see the importance of what they do...

....then keep the vision front and center. Make it real. Show them the difference their contribution makes. Let them see how significant their role is in the grand scheme of the organization.



Learn more about *Drives vision and purpose*

Antonakis, J., Fenley, M., & Liechti, S. (2012). Learning charisma: Transform yourself into someone people want to follow. *Harvard Business Review*, June, 127-130.

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Deep dive learning resource links

- Barón, M. (2013, August 28). *Top tips for creating a clear vision for your business*. Small Business UK. Retrieved from <http://www.smallbusiness.co.uk/starting-a-business/ideas-and-business-planning/2392048/top-tips-for-creating-a-clear-vision-for-your-business.shtml>
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- Frost, S. (n.d.). How to align employees with company goals. *Chron*. Retrieved from <http://smallbusiness.chron.com/align-employees-company-goals-11667.html>
- Genard, G. (2012, March 25). *4 Easy ways to become a more charismatic speaker*. Public Speaking International. Retrieved from <http://www.publicspeakinginternational.com/blog/bid/131382/4-Easy-Ways-to-Become-a-More-Charismatic-Speaker>
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- Kotter, J. (2011, April 27). The biggest mistake I see: Strategy first, urgency second. *Forbes*. Retrieved from <http://www.forbes.com/sites/johnkotter/2011/04/27/the-biggest-mistake-i-see-strategy-first-urgency-second/>
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- Moss Kanter, R. (2012, October 23). 12 Guidelines for deciding when to persist, when to quit. *Harvard Business Review Blog Network*. Retrieved from <http://blogs.hbr.org/2012/10/12-guidelines-for-deciding-when-to-persist-when-to-quit/>
- Spiro, J. (2010, August 30). How to get employees excited about your business vision. *Inc*. Retrieved from <http://www.inc.com/guides/2010/08/how-to-get-employees-excited-about-your-business-vision.html>
- Tabaka, M. (2010, August 24). 3 Steps to make your vision work for you. *Inc*. Retrieved from <http://www.inc.com/marla-tabaka/3-steps-to-make-your-vision-work-for-you.html>

Recommended search terms

If you'd like to explore *Drives* vision and purpose further, try searching online using the following terms:

- Aligning employees with company goals.
- Aligning your words and actions.
- Appealing to different audiences.
- Getting employees excited about your vision.
- Persevering through roadblocks at work.
- Strategic fitness and urgency.

Understanding the CEO Stallers and Stoppers

In this section of the guide, you will find the 5 Career Stallers and Stoppers included in the CEO Success Profile. These are behaviors generally considered problematic or harmful to career success. For example, if you receive feedback that you are a Poor Administrator, this is a serious problem, and your goal should be to neutralize this potentially career-stopping issue. Working on a staller is not the same as building a competency. A staller is much more serious and likely results from many sources—what you underdo and/or what you overdo. Below you will find behaviors associated with what it looks like when this is a Problem, Not a Problem and Some Possible Causes. Knowing the staller/stopper helps you fully understand how they show up in the work; thus helping you determine what to focus on in your development.

Poor Administrator

People differ widely on personal organization, ranging from the perfectionist with everything having to be just so, to the disorganized absent-minded professor never knowing where things are and never being on time with anything. There are really two issues. The first is personal disorganization. The fallout is having too much to do, being late on commitments, having to work longer hours to keep up, losing key documents, forgetting appointments, not doing things completely that have to be redone later, etc. It leads to personal inefficiency and ineffective use of personal time and resources. The second issue is many times worse than the first. It's the disruption your personal disorganization has on the processes managed by others. When your reports are late, others get delayed. When you're late, others have to wait. When the form isn't completed properly, someone else has to take the time to get it corrected. Many people go through life happily disorganized and disheveled. The key is its impact on the people around you.

"I must govern the clock, not be governed by it."

Golda Meir – Israeli teacher, politician, and former Prime Minister of Israel

A problem

- Has low detail-orientation.
- Lets things fall through the cracks.
- Overcommits and underdelivers.
- Misses key details.
- Forgets undocumented commitments.
- Has to scramble to pull things together at the last minute.
- Moves on without completing the task.

Not a problem

- Well organized and detail skilled.
- Reliable—keeps tabs on work in process; remembers commitments.
- Good administrator; keeps things on track.
- Sets tight priorities.
- Uses time well.
- Says no if they can't get to it.
- Completes most things on time and in time.

Some possible causes

- Can't say no to people; gets overloaded.
- Impatient.
- Poor grasp of due process as seen by others.
- Poor mental organization.
- Poor sense of time.

- Procrastinates.
- Too busy to get organized.

Tips to overcome being a *Poor* administrator

1. **Unsure where to start? Make a list of things to fix.** Do an upstream and downstream check on the people you work for, work around, and those who work for you, to create a list of the administrative slip-ups you make that give them the most trouble. Be sure to ask them for help creating the list. That way, you have a focused list of the things you need to fix first. If you fix the top 10, maybe that will do and the rest of your habits can stay the same.
2. **Overbooked? Practice good time management.** Personal time management is a known technology. There are countless books on the topic as well as a number of good personal time management courses you could attend. Search online for “tips for good time management.” Try out some different approaches. Some will work for you; some won’t and may actually get in the way. Adopt practices you like. Don’t waste time on things you don’t.
3. **Disorganized? Get organized.** Put the things you have to do in two piles—things I have to do that are for me, and things I have to do that are for others or that will affect others. Do the second pile first. Further divide the second pile into the mission critical, important, and things that can wait. Do them in that order.
4. **Need more help? Hire people with organization skills.** If you have the luxury of an administrative assistant, select on the ability to organize themselves and you. Pick someone who is candid, who will stand up to you and help you be successful.
5. **Messy work environment? Contain the clutter.** Make your personal disorganization less obvious to others. If you are a pile manager, get shelving that has addressable cubbyholes so you can get your piles out of the way. Get an L-shaped desk, one for your piles and one that you keep clean for only the project you are working on at the moment. Put the pile table in back of you toward the wall. Have an area of your office—a couple of chairs and a table that you never put anything on—that you can use for visitors. Frame this quotation and put it on your wall so others know you are not very organized: “If a cluttered desk is the sign of a cluttered mind, what is an empty desk the sign of?”
6. **Personal preferences getting in the way? Focus on priorities.** Don’t work based upon your feelings. Don’t organize your work around what you like to do and put off what you don’t like to do. That’s one reason people get into organization problems. Use priorities of what needs to be done instead.
7. **Failing to keep your commitments? Let others help you prioritize.** Ask your internal and external customers for the order in which they need things. If there is going to be a delay beyond the commitment you’ve made, send an e-mail or call and tell them when to expect what you’ve promised. You can only do this once.
8. **Trouble meeting deadlines? Set your own deadline.** Set false deadlines for yourself that are ahead of the real deadlines. Delegate any of the things you have trouble getting done.
9. **Don’t care? Check your attitude toward administrative tasks.** Some people ignore this need as not that important; administration has a trivial sound to it. The problem is, what else does it say about you? Most likely it tells people what you overdo. You’re an action junkie and leave a trail of problems around you, you’re creative and have your fingers in too many pies, or you’re a strategist or a visionary and show disdain for details, which suggests to others that what they do isn’t very important. People rightly see this as a sort

of arrogance. Demonstrate that you appreciate the importance of administrative tasks. Show respect for the people who execute them.

- 10. Not dependable? Build trust.** The bottom line for this need is that people don't trust people who are disorganized, particularly if you indicate you don't much care. They feel they can't count on you, that your actions may wreak havoc for them. Behaving as a consistently responsible administrator will eliminate this problem.

Job Assignments Specific to Your Role

- Plan an off-site meeting, planning session or fundraising event, etc.
- Lead and manage the renovation of an office, Club space, facility, etc.
- Lead and manage the purchase of a major product, equipment, program, or system.
- Manage a dissatisfied stakeholder (donor, board member, staff, partner, parent, etc.); troubleshoot a performance or quality problem with a process, program or service.

Additional Job Assignments

- Manage the renovation of an office, floor, building, meeting room, warehouse, etc.
- Work on a process-simplification team to take steps and costs out of a process.

“Our greatest weariness comes from work not done.”

Eric Hoffer – American writer on social and political philosophy

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Lack of Ethics and Values

Being seen as having questionable ethics means the values and ethics you are operating under are not in line with those of the people around you. On the more negative side, it could mean you have unacceptable values and ethics in a more absolute sense; that is, most would reject them. You may hedge or operate too close to the edge for people to feel comfortable with you. Most of us haven't thought out our values/ethical stances well; we are on autopilot from childhood and our collective experience. People deduce your values and ethics by listening to what you say and, more importantly, watching what you do.

“Ethics is knowing the difference between what you have the right to do and what is right to do.”

Potter Stewart – Former Supreme Court Justice of the United States

A problem

- Lacks the necessary sensitivity to the operating ethics and values of the organization.
- Operates too close to the margins.
- Pushes the limits of tolerance.
- Doesn't operate within the norms.

Not a problem

- Values and ethics are generally aligned with the organization's.
- Operates within boundaries most others would agree to.
- Looked to for guidance on standards and norms.
- Stays steady through crises involving close calls on ethics.
- Can articulate own and others' values.
- Helpful to others in making close calls on values/ethical matters.
- Projects a consistent set of values.

Some possible causes

- Operates close to the edge.
- Overly ambitious.
- Overly independent.
- Pragmatic to a fault.
- Sets own rules of conduct.
- Not consistent across situations; situational ethics.

Tips to overcome *Lack of ethics and values*

1. **Unsure of the real issues? Diagnose the problem.** Make sure you know exactly what your problem is. The range of possibilities is great. Get 360 feedback on this specific issue by having a human resource

professional or outside consultant poll people to find out what your difficulty is. As a less severe problem, you may be just stubborn and rigid, tied to the values of the past, out of tune with the times, pragmatic to a fault, seen as not helpful enough to others, pushing your own agenda, playing favorites, or being reluctant to speak up. As a more severe problem, you might be cutting corners to look good, setting your own rules, blaming others for things you should take responsibility for, sabotaging your rivals, hedging the truth, or showing little concern for others.

2. **Ready to admit it? Take corrective action.** The worst case—your ethics really are questionable. You hedge, sabotage others, play for advantage, set up others and make others look bad. You may be devious and scheming and overly political. You tell yourself it's OK because you are getting the results out on time. You really believe the end justifies the means. If any of this is true, this criticism should have also happened to you in the past. This is not something that develops overnight. You need to find out if your career with this organization is salvageable. The best way to do this is to admit that you know your ethics and values are not the same as the people you work with and ask a boss or a mentor whether it's fixable. If they say yes, contact everyone you think you've alienated and see how they respond. Tell them the things you're going to do differently. Ask them if the situation can be repaired. Longer-term, you need to seek some professional counsel on your values and ethics.
3. **Unpredictable? Be consistent across situations and groups.** You might just be inconsistent in your value stances and actions. You change your mind based on mood or who you talked with last. That may confuse and bother people. You may express a pro people value in one instance (people you manage) and an anti people value in another (people from another unit). You may rigidly adhere to a high moral code in one transaction (with customers) and play it close to the acceptable margin in another (with vendors). You may match your values with your audience when managing up and not when you're managing down. You may play favorites. People are more comfortable with consistency and predictability. Look for the three to five areas where you think these inconsistencies play out. Write down what you did with various people so you can compare. Did you do different things in parallel situations? Do you hold others to a different standard? Do you have so many values positions that they have to clash? Do you state so few that people have to fill in the blanks with guesses? Try to balance your behavior so that you are more consistent across situations.
4. **Sending mixed messages? Avoid “do as I say, not as I do” behavior.** Another possibility is that there is a sizable gap between what you say about your ethics and values and what the ethics and values of others should be and what you actually do in those same situations. Many people get themselves in trouble by giving motivating values and ethics speeches, high-toned, passionate, charismatic, gives you goose bumps—until you watch that person do the opposite or something quite different in practice. Examine all the things you tend to say in speeches or in meetings or casual conversations that are values and ethics based. Write them down the left side of a legal pad. For each one, see if you can write three to five examples of when you acted exactly in line with that value or ethic. Can you write down any that are not exactly like that? If you can, it's the gap that's the problem. Either stop making values and ethics statements you can't model or bring your values into alignment with your own statements.
5. **Muddled values? Get clarity about your values.** You may not think in terms of values much, and your statements may not clearly state your values. To pass the test of a thoughtfully held value, you should be able to state it in a sentence and give five examples of how it plays out—both the situation and consequences. State what is the opposite of the value—what is dishonesty, for example—and demonstrate how you follow the value. Since you are having trouble in this area, it may be a good exercise to try to

capture your value system on paper so you can practice delivering a clear statement of it to others. If you ignore obvious values implications, people may assume you don't care.

6. **Time to change? Thoughtfully and intentionally adopt values and ethics.** Remember, behavior is 10 times more important than words. What values do you want? What do you want your ethics to be? Write them down the left-hand side of the page. I want to be known as a fair manager. Then down the right side, what would someone with that value do and not do? Wouldn't play favorites. Would offer everyone opportunities to grow and develop. Would listen to everyone's ideas. Would call for everyone's input in a staff meeting. Would apportion my time so everyone gets a piece of it. Hold everyone to the same standards. Have someone you trust check it over to see if you are on the right track. Then start to consistently do the things you have written on the right-hand side.
7. **Struggling with close calls? Bring focus and clarity to the gray areas.** Sometimes people get in trouble because they don't understand the underlying mismatch between values. Few people have any trouble with clear-cut values clashes; it's the close calls where ill-thought-through positions get us in trouble. You should be able to pro and con various values. You should be able to help people think through when to break a confidence or when loyalty to the organization supersedes loyalty to an individual. What are the common values clashes you deal with? In these situations, you need to be able to argue both sides of the question. Hedging on your tax return and padding of an expense account—is that the same or different? Working with or firing a marginal performer? Cutting quality or raising the price? Firing someone for drug abuse and serving alcohol at company functions?
8. **Too independent? Recognize that you don't operate in a vacuum.** You set your own rules, smash through obstacles, see yourself as tough, action- and results-oriented. You get it done. The problem is, you wreak havoc for others; they don't know which of your actions will create headaches for them in their own unit or with customers. You don't often worry about whether others think like you do. You operate from the inside out. What's important to you is what you think and what you judge to be right and just. In a sense, admirable. In a sense, not smart. You live in an organization that has both formal and informal commonly held standards, beliefs, ethics, and values. You can't survive long without knowing what they are and bending yours to fit. To find out, focus on the impact on others and how they see the issue. This will be hard at first since you spend your energy justifying your own actions.
9. **Constrained by your own point of view? Go beyond the facts to consider the values of others.** You may be a fact-based person. Since to you the facts dictate everything, you may be baffled as to why people would see it any differently than you do. The reason they see it differently is that there are different values at work. People compare across situations to check for common themes, equity, and parity. They ask questions like who wins and loses here, who is being favored, is this a play for advantage? Since you are a here-and-now person, you will look inconsistent to them across slightly different situations. You need to drop back and ask what will others hear, not what you want to say. Go below the surface. Tell them why you're saying something. Ask them what they think.
10. **Stuck in the past? Adapt when it makes sense.** This is a tough one. Times change. Do values change? Some think not. That may be your stance. What about humor? Could you tell some ribald jokes in the past that would get you in trouble today? Has television and 24-hour news changed our worldview? Is there still lifelong employment? How long does a college education last today versus 20 years ago? Values run pretty deep. They don't change easily. When did you form your current values? Over 20 years ago? Maybe it's time to examine them in light of the new today to see whether you need to make any midcourse corrections.

Job Assignments Specific to Your Role

- Manage the assigning/allocating of space in a contested situation.
- Make peace with an enemy or someone you've disappointed or someone you've had some trouble with or don't get along with very well.
- Resolve an issue in conflict between two people, departments, Club areas, functions, etc.

Additional Job Assignments

- Be a member of a union-negotiating or grievance-handling team.
- Work on a team looking at a reorganization plan where there will be more people than positions.

“Our deeds determine us, as much as we determine our deeds.”

George Eliot – English novelist

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Failure to Build Teams

There is more talk of teams than there are well-functioning teams. Most managers grow up as strong individual contributors. That's why they get promoted. They weren't like the rest of the members of the team. They were not raised in teams. They owe little of their success to teams. As a matter of fact, most of them could tell you stories about how some past team held them back from getting things done. But teams, although strange and uncomfortable to many, are the best way to accomplish some tasks such as creating systems that cross boundaries, producing complex products, or sustained coordinated efforts. It's really rewarding to be a member of a well-functioning, high-performance team. Well-functioning teams can outproduce the collective of what each individual could do on their own. Most individuals would choose to work for a boss who was able to build a well-functioning team.

*“A great person attracts great people
and knows how to hold them together.”*

Johann Wolfgang von Goethe – German poet, scientist, and diplomat

A problem

- Doesn't believe much in the value of teams.
- Doesn't pull the group together to accomplish the task.
- Delegates pieces and parts.
- Doesn't resolve problems within the team.
- Doesn't share credit for successes.
- Doesn't celebrate.
- Doesn't build team spirit.
- Treats people more as a collection of individuals than as a team.

Not a problem

- Usually operates in a team format.
- Talks “we,” “us,” and “the team” versus “I.”
- Gets the whole team motivated and enthused.
- Runs participative meetings and processes.
- Shares credit with the team for successes.
- Adds people to strengthen the team.
- Team performance doesn't suffer when a key person moves on.
- Trusts the team to perform.

Some possible causes

- Can't set common cause.
- Can't resolve conflict among direct reports.
- Doesn't believe in teams.
- Doesn't have the time.

- Doesn't want to deal with the conflict.
- More comfortable one-on-one.
- The idea of a team is resisted by people.
- Poor time management; too busy.
- Too serious.

Tips to overcome Failure to build a team

1. **Prefer an individualistic approach? Find the value in teams.** If you don't believe in teams, you are probably a strong individual achiever who doesn't like the mess and sometimes the slowness of due-process relationships and team processes. You are very results oriented and truly believe the best way to do that is manage one person at a time. To balance this thinking, observe and talk with three excellent team builders and ask them why they manage that way. What do they consider rewarding about building teams? What advantages do they get from using the team format? Read *The Wisdom of Teams* by Katzenbach and Smith. If you can't see the value in teams, none of the following tips will help much.
2. **No time? Make the time and reap the benefits.** Don't have the time, teaming takes longer. That's true and not true. While building a team takes longer than managing one person at a time, having a well-functioning team increases results, builds in a sustaining capability to perform, maximizes collective strengths and covers individual weaknesses, and actually releases more time for the manager because the team members help each other. Many managers get caught in the trap of thinking it takes up too much time to build a team and end up taking more time managing one-on-one.
3. **Not a people person? Focus on basic people skills.** Many managers are better with things, ideas, and projects than they are with people. They may be driven and very focused on producing results and have little time left to develop their people skills. It really doesn't take too much. There is communicating. People are more motivated and do better work when they know what's going on. They want to know more than just their little piece. There is listening. Nothing motivates more than a boss who will listen, not interrupt, not finish your sentences, and not complete your thoughts. Increase your listening time 30 seconds in each transaction. There is caring. Caring is questions. Caring is asking about me and what I think and what I feel. Ask one more question per transaction than you do now.
4. **Want to optimize team performance? Study the characteristics of high-performing teams.** High-performance teams have four common characteristics: (1) They have a shared mindset. They have a common vision. Everyone knows the goals and measures. (2) They trust one another. They know others will cover them if they get in trouble. They know other team members will pitch in and help, even though it may be difficult for them. They know others will be honest with them. They know people will bring problems to them directly and won't go behind their backs. (3) They have the talent collectively to do the job. While not any one member may have it all, collectively they have every task covered. (4) They know how to operate efficiently and effectively. They have good team skills. They run effective meetings. They have efficient ways to communicate. They have ways to deal with internal conflict.
5. **Want to raise the odds that the team will excel? Inspire the team.** Follow the basic rules of inspiring others as outlined in classic books like *People Skills* by Robert Bolton or *Thriving on Chaos* by Tom Peters. Communicate to people that what they do is important, say thanks, offer help and ask for it, provide autonomy in how people do their work, provide a variety of tasks, "surprise" people with enriching, challenging assignments, show an interest in their careers, adopt a learning attitude toward mistakes, celebrate successes, have visible accepted measures of achievement, and so on. Try to get everyone to participate in the building of the team so they have a stake in the outcome.

6. **Unsure of how to assign team roles? Allow roles within the team to evolve naturally.** Cement relationships. Even though some—maybe including you—will resist it, parties, games nights, picnics and outings help build group cohesion. Allow roles to evolve naturally rather than being specified by job descriptions. Some research indicates that people gravitate naturally to eight roles and that successful teams are not those where everyone does the same thing. Successful teams specialize, cover for each other, and only sometimes demand that everyone participate in identical activities.
7. **Want to know the secret to team building? Delegate and empower others.** One true team builder is giving people tough tasks to do, the resources to do them, and the authority to make decisions about it. Delegating increases motivation, releases your time to move on to other things, and gets more work done. Delegating is scary at first. They probably can't do it the first time as well as you can. But with coaching and support, they will learn and eventually either do it as well as you can or, better yet, do it better.
8. **Focused on the individual? Leverage the power of words and rewards.** Use *we* instead of *I*. Use *team*, *us*, *together*, more. Say *let us*. Let's get together. We can do it. We're all in this together. Signal that you are thinking team. Do you talk teams and reward individuals? To the extent that you can, reward the team more. Take some incentive money and divide it equally among the team members. Set team goals and line up team rewards.
9. **Team stuck in a rut? Create a climate of innovation and experimentation.** Don't prescribe how to do everything. How things are done should be as open as possible. Studies show that people work harder and are more effective when they have a sense of choice. Encourage quick experiments. Most innovations and experiments will fail, so communicate a learning attitude toward mistakes and failures.
10. **Need an outside perspective? Engage a team coach.** Because a team coach is external to the team, they can objectively help you problem solve and provide you with feedback to avoid some of the temptations that can demotivate a team. The team coach could be a human resources partner or an external professional who specializes in coaching.
11. **All work and no play? Build a sense of joy and fun for the team.** Research noted in *The Wisdom of Teams* by Katzenbach and Smith found there were several common threads among high-performing teams, including having fun. Fun is a by-product of the team's sense of commitment to each other and performance. If your team doesn't seem to be having fun, look for likely causes. Are the team members committed to the goals of the team? Are the team members committed to one another? Fixing one or both of these issues might result in more fun.
12. **Ready to lead? Set the standard by modeling it.** Use your behavior to shape the behavior and performance of others. You have an opportunity to set the standard for the team. Many people resist developing new behaviors if they don't see those behaviors rewarded or demonstrated by more senior people. If behavior changes are required to improve team performance, they must start with you.
13. **Team in a downward spiral? Study the characteristics of low-performing teams.** Much research has been done on why teams fail. Your team is probably not unique. Read *The New Why Teams Don't Work* by Robbins and Finley and determine if your team has fallen into one of the common team traps and work to create a strategy to get the team back on track.

Job Assignments Specific to Your Role

- Manage a group of low-competence or low-performing people through a task they couldn't do by themselves.
- Manage a group of people who are older and/or more experienced to accomplish a task.
- Assemble a team of diverse people to accomplish a difficult task.

Additional Job Assignments

- Manage a group of people involved in tackling a fix-it or turnaround project.
- Build a multifunctional project team to tackle a common business issue or problem.

"It's amazing what you can accomplish if you don't care who gets the credit."

Harry S. Truman – 33rd President of the United States

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Non-Strategic

There are a lot more people who can take a hill than there are people who can accurately predict which hill it would be best to take. There are more people good at producing results in the short-term than there are visionary strategists. Both have value but we don't have enough strategists. It is more likely that your organization will be outmaneuvered strategically than that it will be outproduced tactically. Most organizations do pretty well what they do today. It's what they need to be doing tomorrow that's the missing skill. Part of every manager's job is to be strategic. The higher you go, the more critical the requirement.

*“Strategy without tactics is the slowest road to victory.
Tactics without strategy is the noise before defeat.”*

Sun Tzu – Chinese military strategist

A problem

- Can't create effective strategies.
- Can't deal effectively with assignments that require strategic thinking.
- Gets mired in tactics and details.
- Prefers the tactical over the strategic, simple versus complex.
- Isn't a visionary.
- Lacks broad perspective.

Not a problem

- Can think and talk strategy with the best.
- Intrigued and challenged by the complexity of the future.
- Likes to run multiple “what if” scenarios.
- Very broad perspective.
- Counsels others on strategic issues.
- Can juggle a lot of mental balls.
- Isn't afraid to engage in wild speculation about the future.
- Can bring several unrelated streams of information together to form a compelling vision.
- Good at meaning making.
- Produces distinctive and winning strategies.

Some possible causes

- Doesn't like complexity.
- Doesn't think the future is knowable.
- Inexperienced.
- Lack of perspective.
- Low-variety background.
- Low risk taker; doesn't like uncertainty.
- New to the area.

- Too busy with today's tasks.
- Too narrow.
- Very tactical.

Tips to overcome being Non-strategic

1. **Problems with presentation? Use strategic language.** In some rare cases, we have found people who could think strategically but were not identified as such because they either didn't know, rejected, or chose not to use what they considered the latest strategic buzzwords. Strategy is an emerging and ever-changing field. At any time, there are gurus (at present probably Michael Porter, Ram Charan, Gary Hamel, Fred Wiersema, and Vijay Govindarajan) in vogue who create new words or concepts (values disciplines, strategic intent or destination, value migration, co-evolution, market oligarchy, core capabilities, strategic horizon) to describe strategic thinking. If you don't use those words, then others won't know you're being strategic. New words can be found in books by these gurus, in the *Harvard Business Review*, and in *Strategy and Leadership*—a publication of the Strategic Leadership Forum. And, yes, most of the words are bigger words for things we used to call something else with smaller words. Nevertheless, if you want to be seen as more strategic, you have to talk more strategically. Every discipline has its lexicon. In order to be a member, you have to speak the code.
2. **Rejecting strategy? Recognize the value of strategic planning.** There are people who reject strategic formulation as so much folly. They have never seen a five-year strategic plan actually happen as projected. They think the time they use to create and present strategic plans is wasted. They think it's where the rubber meets the sky. While it's true that most strategic plans never work out as planned, that doesn't mean that it was a wasted effort. Strategic plans lead to choices about resources and deployment. They lead to different staffing actions and different financial plans. Without some strategic planning, it would be a total shot in the dark. Most failed companies got buried strategically. They picked the wrong direction or too many directions. Not being able to produce a quality product or service today is generally not the problem.
3. **Don't think about the future? Be curious and imaginative.** Many managers are so wrapped up in today's problems that they aren't curious about tomorrow. They really don't care about the future. They believe there won't be much of a future until we perform today. Being a visionary and a good strategist requires curiosity and imagination. It requires playing "what ifs." What are the implications of the growing gap between rich and poor? The collapse of retail pricing? The increasing influence of brand names? What if it turns out that there is life on other planets and we get the first message? What will that change? Will they need our products? What will happen when a larger percentage of the world's population is over the age of 65? The effects of terrorism? What if cancer is cured? Heart disease? AIDS? Obesity? What if the government outlaws or severely regulates some aspect of your business? True, nobody knows the answers, but good strategists know the questions. Work at developing broader interests outside your business. Subscribe to different magazines, pick new shows to watch, meet different people, join a new organization. Look under some rocks. Think about tomorrow. Talk to others about what they think the future will bring.
4. **Narrow perspective? Broaden your perspective.** Some people are sharply focused on what they do and do it very well. They have prepared themselves for a narrow but satisfying career. Then someone tells them their job has changed and they now have to be strategic. Being strategic requires a broad perspective. In addition to knowing one thing well, it requires that you know about a lot of things somewhat. You need to understand business. You need to understand markets. You need to understand how the world operates.

You need to put all that together and figure out what it means to your organization. And then you have to create a strategy.

5. **Too busy? Delegate the tactical and make time for strategy.** Strategy is always last on the list. Solving today's problems, of which there are many, is job one. You have to make time for strategy. A good strategy releases future time because it makes choices clear and leads to less wasted effort, but it takes time. Delegation is usually the key. Give away as much tactical, day-to-day stuff as you can. Ask your people what they think they could do to give you more time for strategic reflection. Another key is better time management. Put an hour a week on your calendar for strategic reading and reflection throughout the year. Don't wait until one week before the strategic plan is due. Keep a log of ideas you get from others, magazines, etc. Focus on how these impact your organization or function.
6. **Avoiding ambiguity? Embrace the uncertainty.** Strategic planning is the most uncertain thing managers do. It's speculating on the near-unknown. It requires projections into foggy landscapes. It requires assumptions about the unknown. Many conflict avoiders don't like to make statements in public that they cannot back up with facts. Most strategies can be questioned. There are no clean ways to win a debate over strategy. It really comes down to one subjective estimate versus another.
7. **Addicted to the simple? Embrace the complexity.** Strategy ends up sounding simple—five clean, clear statements about where we want to go with a few tactics and decisions attached to each. Getting there is not simple. Good strategists are complexifiers. They extend everything to its extreme before they get down to the essence. Simplifiers close too early. They are impatient to get it done faster. They are very results oriented and want to get to the five simple statements before strategic due process has been followed. Be more tolerant of unlimited exploration and debate before you move to close.
8. **Don't know how to be strategic? Become a student of strategy.** The simplest problem is someone who wants to be strategic and wants to learn. Strategy is a reasonably well-known field. Read the gurus—Michael Porter, Ram Charan, C. K. Prahalad, Gary Hamel, Fred Wiersema, and Vijay Govindarajan. Scan the *Harvard Business Review* regularly. Read the three to five strategic case studies in *Bloomberg Businessweek* every issue. Go to a three-day strategy course taught by one of the gurus. Get someone from the organization's strategic group to tutor you in strategy. Watch CEOs talk about their businesses on cable. Volunteer to serve on a task force on a strategic issue.
9. **Can't think strategically? Practice strategic thinking.** Strategy is linking several variables together to come up with the most likely scenario. It involves making projections of several variables at once to see how they come together. These projections are in the context of shifting markets, international affairs, monetary movements, and government interventions. It involves a lot of uncertainty, making risk assumptions, and understanding how things work together. How many reasons would account for sales going down? Up? How are advertising and sales linked? If the dollar is cheaper in Asia, what does that mean for our product in Japan? If the world population is aging and they have more money, how will that change buying patterns? Not everyone enjoys this kind of pie-in-the-sky thinking and not everyone is skilled at doing it.
10. **Don't want to be strategic? Get some help.** Some just don't feel they want to ramp up and learn to be strategic. But they like their job and want to be considered strategically responsible. Hire a strategic consultant once a year to sit with you and your team and help you work out your strategic plan. Accenture. The Boston Consulting Group. McKinsey. Booz Allen Hamilton. Strategos. Plus many more. Or delegate strategy to one or more people in your unit who are more strategically capable. Or ask the strategic planning group to help. You don't have to be able to do everything to be a good manager. You like your nest? Some

people are content in their narrow niche. They are not interested in being strategic. They just want to do their job and be left alone. They are interested in doing good work in their specialty and want to advance as far as they can. That's OK. Just inform the organization of your wishes and don't take jobs that have a heavy strategic requirement.

Job Assignments Specific to Your Role

- Do a competitive analysis of your organization's services or position in the marketplace, and present it to your Board, executive committee and/or team.
- Do a retrospective on a successful project, and present it to your Board, executive committee and/or team.
- Do a feasibility study on an important opportunity and make recommendations to your board, executive committee and/or team.

Additional Job Assignments

- Monitor and follow a new product or service through the entire idea, design, test market, and launch cycle.
- Study and summarize a new trend, product, service, technique, or process, and present and sell it to others.

"What's the use of running if you are not on the right road?"

– German proverb

Learning resources

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Political Missteps

Organizations are a complex maze of constituencies, issues, and rivalries peopled by strong egos, sensitive personalities, and empire protectors. People who are politically savvy accept this as the human condition and deal with it by considering the impact of what they say and do on others. Political savvy involves getting things done in the maze with the minimum of noise. Political mistakes come in a variety of shapes and sizes. The most common is saying things that you shouldn't. This comes in two shapes—you knew it was wrong but you couldn't hold it back, or you didn't know it was wrong to say and were surprised at the reaction. Next, are actions that are politically out of line and not right for the context. Worst, are politically unacceptable moves, initiatives, tactics, and strategies. You tried to get something done in the organization and went about it in the wrong way. Last are unnecessary conflicts, tensions, misunderstandings, and rivalries created because you provoked a specific person or group.

“Every political system is an accumulation of habits, customs, prejudices, and principles that have survived a long process of trial and error and of ceaseless response to changing circumstances.”

Edward C. Banfield – American political scientist and author

A problem

- Can't get things done in complex political settings and environments.
- Lacks sensitivity to people and organizational politics.
- Doesn't recognize political due process requirements.
- Says and does the wrong things.
- Shares sensitive information and opinions with the wrong people.

Not a problem

- Is politically smooth and noiseless.
- Reads individuals and groups well; knows how they are affected.
- Modifies approach when resistance is met.
- Keeps confidences.
- Can maneuver through rough water without getting wet.
- Uses multiple ways to get things done.
- Adjusts to the realities of the political situation.
- Counsels others on political approaches.
- Usually knows the right thing to do and say.

Some possible causes

- Competitive with peers.
- Doesn't read others or their interests well.

- May be too candid to curry favor.
- May share wrong/sensitive information.
- Misunderstands what political savvy is.
- No patience with due process.
- Poor impulse control.
- Poor interpersonal skills.
- Poor negotiator.
- Seen as a strident advocate.

Tips to overcome Political missteps

1. **Can't hold back? Work on impulse control.** Many people get into political trouble because they find it difficult to hold things back. It's not that they didn't know what they were about to say was going to cause noise, they just have weak impulse control. They say almost everything that occurs to them to say. It's even possible that others in the room or in the meeting were thinking the same thing. The difference is that they kept it to themselves. When you dump everything before you put it through a political filter, much of what you say will cause noise and will be seen as poor political judgment by others. One rule is to let others speak first and follow their lead before you dump.
2. **Humor seen as offensive? Keep it in good taste.** Many people get into political trouble with their humor. Times have changed. Workplace demographics have changed. Humor that was once seen as OK is now politically unacceptable and possibly illegal. The guidelines are simple. Refrain from using humor that hurts or demeans others. Don't use any type of humor that involves prejudice, such as racial comments, making fun of someone's disability, physical appearance, or gender-biased humor. No humor that is critical or sarcastic is acceptable. This doesn't mean that people should avoid humor in the workplace. Humor can have a positive impact. It releases stress, spurs creative thinking, increases productivity. Encourage appropriate humor.
3. **Want to avoid politics? Evaluate your attitude toward politics.** Many people confuse the terms political savvy and being political. When someone criticizes you for not being political, you might interpret it as the bad political. Being bad political means that your motives should not be trusted. Being bad political means saying one thing and meaning another. It means being devious and scheming. Being politically savvy means saying and doing things that fit into the commonly held beliefs people have around you about what's appropriate and wise and what is not. It's about a set of standards that most people around you would agree to. Being politically savvy means you can transact with others and get things done in the maze with minimum noise and without triggering an unnecessary negative reaction from others.
4. **Stuck with a predictable approach? Adjust to the situation and the audience.** In any culture or organization, there are multiple ways you can get things done. You could use a direct attack. You could get an ally first. You could send in a more acceptable substitute for yourself. Some of these tactics are more effective and acceptable than others. Some people get into trouble because they treat all situations the same. They don't do any research about the most effective ways to get things done for each event. People who are politically savvy operate from the outside in—starting with the audience, person, group, organization. They pick their pace, style, tone, and tactics based upon an evaluation of what would work best in each situation. We all have a number of ways in which we can behave if we want to. It's the one-trick ponies that get into political trouble because they don't adjust what they say and do to each audience.
5. **Too honest? Decide whether candor is appropriate.** Candor can be a mission-critical requirement in a 9 a.m. meeting and politically unwise and unacceptable in a 10 a.m. meeting. Many people get themselves

into political trouble with either too much candor that ends up hurting others and causing noise, or too little candor seen as holding back something important. Many often say, “I just say what I think. I’ve always believed in saying exactly what I mean. Consequences be damned. If they don’t like it, they shouldn’t have asked me about it.” While that might get good marks for integrity, it would fail the political savvy test. Each situation must be examined on the candor scale. Are the right people here? Is this the best time for candor? Should I let someone else start before I do? Did the speaker who asked for candor really mean it?

6. **Don’t know the key players? Navigate the politics of the organization.** Who are the movers and shakers in the organization? Who are the major gatekeepers who control the flow of resources, information and decisions? Who are the guides and the helpers? Get to know them better. Do lunch. Who are the major resisters and stoppers? Either avoid them or sidestep them or make peace with them. Every maze has its solution. Being politically savvy means finding that least distant path through the organizational maze.
7. **Sharing too much? Make sure comments are relevant and proper.** Are you sharing things inappropriately to cement a relationship, to get something you need, to feel like an important insider, or because you just don’t think it through? Monitor yourself closely and ask these questions: “Why am I sharing this? Does it move a problem along? Do people really need to know this? Will this make someone else look bad or will it be obvious where I got it? Am I name dropping? Have I labeled facts as facts and opinions as opinions? Will this be considered grousing, gossiping, or cutting down another person or group? In the worst case, how could this person use this information in a way that would reflect badly on me?” A general rule of thumb is that you can be as candid as you like as long as comments refer to specific problems/issues and you’re not violating confidences and the person you are giving the information to can be trusted.
8. **Talking about people? Refrain from gossiping.** A lot of political noise comes from sharing private views of others in the wrong settings and with the wrong people. All things come around that go around. In closed organizations, people quickly find out what you have said about them. If you are having trouble with this, the simplest rule is never to share any negative information about another person unless it is a formal evaluation process in the organization.
9. **Dealing with executives? Approach top management with extra care.** In the special case of dealing with top management, sensitivities are high, egos can be big, and tensions can be severe. There is a lot of room for making statements or acting in ways that would be seen as exhibiting poor political judgment. There usually isn’t a second chance to make a good first impression. Plan your approach carefully. Consider what this audience is looking for. Be respectful of their time. Share information clearly and concisely. Express opinions tactfully. Practice your message in advance. It might also be valuable to talk to experienced colleagues about the sensitivities, priorities, and preferences of top management. What are their hot-button issues? What pitfalls do you need to avoid? How can you adjust your style to engage with them as effectively as possible?
10. **Strong point of view? Temper your advocacy and make the business case.** Strident advocates don’t usually fare well in organizations because their perspectives are seen as rigid and narrow. To avoid being seen this way, make the business or organizational case first. Be more tentative than you actually are so others have room to get comfortable and negotiate and bargain. People who have trouble with this tend to state things in such an extreme that others are turned off and can’t save face, even if they agree with more than 50% of what you are pushing for.

Job Assignments Specific to Your Role

- Manage the interaction between partners and the organization on critical programs or services.
- Prepare and present a proposal of some consequence to the Board.
- Manage the assigning/allocating of space in a contested situation.

Additional Job Assignments

- Integrate diverse systems, processes, or procedures across decentralized and/or dispersed units.
- Work on a team that's deciding whom to keep and whom to let go in a layoff, shutdown, delayering, or merger.

*"Politics is the art of looking for trouble,
finding it whether it exists or not,
diagnosing it incorrectly
and applying the wrong remedy."*

Sir Ernest Benn – British publisher and writer

Learning resources

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Sample 70-20-10 Development Worksheet

<p>FOCUS AREAS</p> <p>Date: <u>01-01-2019</u></p> <p>Name: <u>J. Smith</u></p> <p>Job Title: <u>CEO</u></p>	<p>Development through experience 70% of development comes from OTJ learning and/or targeted work experiences like job rotations and special projects</p>
	<p>Development through coaching, mentoring 20% of development comes from coaching, shadowing and mentoring by senior leaders and/or SMEs</p>
	<p>Development through formal learning 10% of development comes from formal learning opportunities like workshops, classroom sessions and/or reading</p>

Focus Areas	Actions for Development	Date	Results
Developing Capabilities to ensure Strategic Mindset and Execution	<p>70 Conduct a competitive analysis of your organization's services and position in the marketplace.</p> <p>Work closely with Exec Board and Ops Team to build frameworks that will help set the stage for continued growth</p>	August	Will better translate Strategic Priorities into effective implementation through clear communication, data analysis and the assigning of responsibilities and accountabilities.
	<p>20 Engage Board Chair and Mentor that will help in identifying support, establishing clear accountability and hearing ideas from others</p>	Fall	
	<p>10 Identify in-person and virtual training opps that will build capabilities in the areas of effective communication, long range strategic planning and change management</p>	August Oct	
Building and Sustaining Internal and External Networks to advance goals	<p>70 Interview six people in six different areas (other CEOs of Clubs & non-profits and community business leaders). Summarize what you learned about their perspectives on leading a business. Consider how you will be able to use this information to help build your network. Keep a record of the new relationships you develop at all levels.</p>	August	Will have a strong partnership process that leads to strategic thinking, allowing more time to analyze and review possible opportunities as opposed to "just getting it done."
	<p>20 Engage my Board Chair and key stakeholders to build connections and learn practices that work.</p>	August	
	<p>10 Seek learning platforms that continue to build my capabilities around prioritizing and future-casting to identify possible roadblocks</p>	Dec	
Developing the Talent of Others	<p>70 Mentor an indirect report. Understand their goals and tailoring my approach to meet their needs.</p> <p>Develop an under-performer. Give a fair and accurate appraisal of their strengths and weaknesses and clarify the performance gap.</p>	August	Will better develop, motivate, attract and ultimately retain good talent for the team while helping individuals feel they are contributing to the achievement of organizational goals.
	<p>20 Work with Peers, Board Chair and DOD to discuss process and provide constructive feedback for my reflection</p>	August	
	<p>10 Seek additional learnings around empowering others to support organizational strategies and goals</p>	Dec	