



2022

Managing the Maelstrom

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Acknowledging Truths

7 January, 2022

This week I am taking a different tack on thinking. Over the last week, I have become aware of what I think is a very real issue in thinking at this point in the pandemic, as we have come through the black days of January. This week relates to our desire to get back to what we know and with what we are comfortable.

Human nature is always to get to stasis. It is to get back to what is familiar and comfortable. For those who know Forrest, we call this anaklesis. It is the need to lean on old ways, and beliefs in order to feel more whole. Anaklesis is the desire for stability, and often is misrepresented in business as change aversion. It is not that we don't want change, it is that we are leaning on those old ways. Deep down we want to be back on the 12th of March 2020.

We still unconsciously compare ourselves to that time. I've noticed that people have not really taken stock of what they have come through. The markets compare performance against a time that is no more. CEOs compare their performance to the years before. People wish away time to get back to halcyon days that can never be the same. We are all trying to get back, and we are becoming more and more anxious, angered, and disturbed by the never-ending cavalcade of COVID issues and fears.

The manifestation is an emotional outpouring that can take many forms. Anxiety, defeatism and generalized anger, sometimes without even a target for that anger, are common. We see expressions of this discomfort in non-rational or knee-jerk thinking, protests, demonstrations, and riots. We aren't sure where it comes from, but we are all living the 1976 film Network, "I'm as mad as hell and I'm not going to take this anymore!"

I fear we have lost sight of the reality of what we have come through. We have lost sight of our human perseverance. We have forgotten how far we have come in very demanding circumstances. Ask yourself – when was the last time you stopped, paused, and acknowledged these simple truths:

- I continue to navigate the most challenging time in world history since the Second World War.
- I am living through a challenge that has united humanity in a common fear and purpose.
- I have faced down a predator that is after my health and life.
- I, and my family, my peers, my coworkers, and my team have faced down that same predator

Take a moment to consider the context you are in now and not the context of two years ago. Old measuring sticks are inaccurate, unrealistic and unfair to both ourselves and others.

In thinking, one of the most powerful and least used thinking operations is to re-describe what you are thinking, seeing, sensing, and feeling. It gives you the power to see further afield. In the realm of mental wellness, it is your force multiplier to handling the world around you.

If you take the time and re-describe how you feel with reflection, I guarantee you will find that you have been steadfast, resilient, and demonstrated your durability. Sure, it could be better, but you are coming out the other side of all this. You have persevered in the face of all of this. An old sergeant-major of mine used to say – “life is very simple; all you have to do is live.”

I wish you all the best this weekend, and may you live it to its fullest and not look back, but forward.

Short-Term vs Long-Term Thinking

14 January, 2022

Last week I implored you to look how far you have come and not to drive through the rear-view mirror. Many of you reached out to share the value you found in stopping to think about what we've come through.

The past two years have gone forever. It is, and will continue to be, a new world. We have to let go of the beliefs that held us before, and we need to think differently.

As we acknowledged Groundhog Day this week, it may have felt like the movie of the same name where we are re-living the same day all over again. I would challenge your thinking and suggest that we are, in fact, in rapidly changing times. It may not be obvious, but as the days gradually get longer, I sense a different feeling in the air.

This feeling of a gradual improvement conflicts with the troubling things we see in the news of late. Some people are unsure what they want, what to do, and lack a longer-term view.

This brings me to the topic of short term thinking. This individualized, self-serving, in the moment thinking seems to be everywhere and it impacts us as leaders.

Short-term thinking is where our politicians think only in terms of the next election and businesses only look at the next quarter. There is self-protection in short-term thinking. I am taking care of myself or perhaps my family. I am ensuring I get re-elected or I am ensuring I have a job. I am not looking at the greater good or the longer term.

However, only in long-term thinking can we hope to create lasting improvement.

We all need to ask ourselves what am I doing for the collective longer-term betterment. I am not suggesting mere virtue signalling, but asking what am I doing for the world beyond my ego? As leaders of people, our job is to think longer term.

So the question for this week, what are you doing to overcome this short-term individualistic thinking, as you struggle through this covid era, what are you doing for the greater good? I cast no aspersions. But if you are like me, feeling frustrated by the events outside our control, I suggest you re-describe it and find the things of the greater good that you will step up to defend and fight for.

Our world needs true leadership, which comes from selflessness and longer-term thinking. It is time for us to demand it of bosses, politicians, media and ourselves. I said I felt a change and I think we need to be vigilant that the change needs to be to something better and not going backwards. We need to be steadfast in our resolve for a better world and vigilant not to slide back.

Steadfast, Vigilant and Optimistic

Trust

21 January, 2022

As promised, this week I am continuing the discussion on thinking by adding the element of trust. Thinking represents how we use our whole self to do something, and trust represents how people feel about us doing that.

How do these two come together? When we do something (based on either cognitive or affective thinking), how do people perceive it? The reality is that what others do may be based on their thinking; however, it is reviewed, assessed and perhaps judged by our own thinking. If it is unclear how someone concluded to do, or not do, something, we will struggle to understand it, accept it, or agree with it. The end result is that we may not trust either the decisions or intentions of others.

There is a careful balance between trusting based on clarity and merely trusting because we have a prior relationship. When we don't have that foundational relationship, it makes it harder to accept ideas at face value. If you add into that that it is unclear how they got there, or there is a question of intention, that merely exacerbates the chances that trust can flourish.

How do you deal with this issue then?

As the thinker, there are things I can do next time. The first is to make my thinking visible. I like to call this "sell your thinking". Ask yourself these questions:

- How can I demonstrate my thinking?
- Is there proof I should provide?
- Is there data they should see?
- How can I show them how I have explored the topic?
- How can I clarify why I came to this thought?

In the interest of clarifying intention, spend the time to explain upfront what you are trying to solve for. What do you want people to know and how do you want them to feel?

Armed with these, you will begin to expose people to that most invisible world to them – your thinking. With this, you may enhance your own trust in your thinking and, in turn, you will enhance others' trust in your thinking. The root to building trust is to show your process.

If you have watched the past weeks' events, you will have been wondering how the decisions that have been made came about and the true intentionality of various players. Without any of these things in place above, you cannot trust those characters at play.

It takes a long-time to build trust, but being clear to others in your thinking moves it forward. But, as we have seen, it takes mere moments to break trust.

Have a great weekend. Hopefully, I have given you something to think about.

Steadfast, Vigilant and Optimistic

Thinking

28 January, 2022

“Ok, I’ve had enough; I can’t handle this anymore; it has just become too depressing – the media is driving me crazy”. These were the words I heard this week from our team, and it got me thinking – if they were feeling it, others must be as well.

We are in a media overload. Social media is pulling us in different directions, its algorithms reinforcing whatever we liked, however long ago. Those same algorithms potentially stifle free-thinking and provide us with immediate gratification that others share our opinions.

Traditional media is not helping either, reminding us that war is potentially around the corner, that our fellow citizens have gripes, our civil liberties might be under threat or that 14 year olds are executing 18 year olds at school.

With all this, it made me start to wonder what people are thinking. It is no wonder many of us are depressed and listless. Fun, and the ability to let go, has been held back so long that these “news” forces have taken hold of our psyche. So, it made me consider – what types of thinking do you need to do to deal with all this?

(I share this not as though I have the answers but rather as a thought starter.)

Here is where I believe we need to steer our thinking:

- First, Set Level – don’t get mired in the minutiae; search only as far as you need to feel educated and informed; don’t get sucked into tangential thinking.
- Challenge what you see – look for the real sources; question the authorities' "because they say so".
- Distinguish – what is really essential; weed out non-essential information.
- Predict for yourself – what is truly the likelihood of these things happening?, after all, that is what everyone else is doing.
- Finally, Interpret on your own what is happening – don’t let the pundit do it; make sense of it yourself and ask “why?”

I also believe we need to avoid some thinking, so these are the things to avoid:

- Don't let yourself look in or look out for all the various details and data; it will merely suck you in.
- Similarly, don't search endlessly to specify all the details; it will sap your energy – stick to face value.
- As part of challenging above; stay clear of finding the things that you value - don't reinforce your prejudices.
- Finally, stay out of imaging and pretending what might possibly happen - it will only lead to fear

We are using the various media to help us find the truth, but it is their truth, not yours. You will need to judge their truth; don't allow them to judge yours. Choose your sources carefully, look for bias and correct for it. Using your Judgement and Discretion will, I believe, make you happier and more objective because now you have some control of what is being sent to you.

Seek out positive and inspiring stories as well. Media latches onto the negative and frightening because that is what people respond to emotionally. So, making a concerted effort to find news stories that are on the positive spectrum can relieve the fatigue. Even more, don't be afraid to turn it all off for a while. We can be responsible citizens without being constantly hyper-informed.

If you agree with me perhaps share it with your team and even your family it may lead them to a happier place. Ignore the noise – even the important stuff – over the course of the long weekend and enjoy Family Day with the intended audience.

When I look beyond the headlines, I believe things truly are getting better.

Ethics

4 February, 2022

Months ago, I wrote about Tony Welsh's comment that, "during covid, not everything changed, but everyone has". When you stop and think about it, I am sure you will agree. What was important before may not be important now; what was not important may now be very important.

This week, after I heard stories from some clients and other businesses, I thought about what has happened to ethics in society. Consider this, we likely all now think very differently about what we value. Our thinking about what we see as "good for us" has changed.

If we do not check ourselves in our thinking, we may be overwhelmed by what we like and don't like. If you wonder why people behave erratically or differently, they may have moved off the North Star and now navigate by Magnetic North. It's a small change, but it can put you in a very different place.

What made me consider this, is the cases I have heard of employers not caring for their people, businesses taking short cuts, the nickel and diming of business to save a few dollars. Where else do you see this if not in the six pack of bagels that is now five, or the smaller box of corn flakes?

Some things to ponder from my friend Marc Tasse's survey research at the University of Ottawa:

- Over 76% of respondents had faced an ethical dilemma more than 5 times in the last year.
- 63% saw that a weak corporate culture of ethics was the likeliest cause of an ethical breach.
- 42% felt that the major cause of the ethical violations were greed and personal motivations – there was no greater cause

Unchecked, this trend is liable to get worse. As our world tumbles through greater uncertainty, our leaders will return to what they think is good, which in turn may not be that North Star of ethics but very much populist, short term, self-gratifying thinking. I would argue now, more than ever, we need to heed universal utility, strive for the end of hubris, and work toward the replacement of individual ego for the collective betterment.

We are at a point in time where we have the chance to make much of the challenges of the last two years. If we look to what is right for our businesses and our society, rather than what is good for us, we will be able to achieve great things as we face the adversity on the horizon.

As you ponder your weekend, ask yourself – how are you and those around you exhibiting the moral courage towards the betterment of all and not just the self?

Steadfast, Vigilant, and Optimistic.

Support for Ukraine

11 February, 2022

It is amazing how the world has changed in a little over a week. While I was opining about ethics, last week our world was changing. The sheen came off and many of us were reminded of just how inhuman humanity can be.

We were presented with the stark nature of how hubris in a bully can be met with determination to stand up to that bullying. Never in my life have I seen a confluence of events that so galvanized the world – albeit a little slower than it needed to be.

President Zelensky, his cabinet, and the Ukrainian people standing up to the aggressor are determined to do what is right, and not necessarily what is easy. They have chosen a rough road ahead.

The globe's condemnation has brought the world much closer together than it has been in a very long time. It is about saying no to those that would flaunt decency and the rule of law.

I have no idea how this will all pan out. My heart goes out to the people of Ukraine as they face these horrendous acts of aggression. I believe their example has awoken us all to what is important and, arguably, the world will never be the same again. Bullies and tyrants cannot win wherever they are. Unfortunately, this conflict has been the cost to remind us of this, and what is really important in our world – true freedom.

No doubt, if you are like me, you will continue to watch the humanitarian situation unfold, feeling helpless in what we can do. But I believe what we can do is steel ourselves and stand resolved that this behaviour cannot be allowed to continue.

Slava Ukraini.

Steadfast, Vigilant, and Resolute.

More on Ukraine

18 February, 2022

This week the “old cold warrior” in me has come out. To understand what is going on in Ukraine, I have been reaching back to my years of teaching Operations and Tactics at the Army Staff College. We studied Soviet and then Russian tactics after the fall of the Soviet Union because we still saw them as the near-peer enemy.

What got me thinking this week, though, was what will these events do to our collective thinking? The pandemic changed how many see the world but this conflict will undoubtedly have a profound effect as well. While there have been many wars since the Second World War, a European conflict of this size has not been seen since then. Attitudes towards service to the nation stalled during the Vietnam era. There has not been the same galvanizing evil empire threatening a country, let alone the world, especially with a tinge of nuclear fear.

How will the current generations see this? While it has many parallels to the Spanish Civil War, which was the harbinger of the Second World War, our attitudes are likely changing. Consider the many Canadians and Americans who have crossed the ocean to join the fight. To them, this has become a just war—layer on top the massive humanitarian crisis and the targeting of innocent civilians. We, hourly, see the enormous weight of refugees, and I would suggest equally worrisome is the unseen untold number of internally displaced persons who are offered no sanctuary under international law.

All of these images are going to have an impact. If “not all things changed under COVID, but everyone did”, this too shall create changes in our families, in our co-workers and new challenges to leaders around the world. We are witnessing history. If it does not pull us all into it, it will make us very wary for the future.

The world has seen the collapse of the legal frameworks that we relied on to keep us safe. When a bad actor chooses to flaunt laws there is very little recourse. When those laws are the legitimacy of nations or humanitarian law it does not bode well for our society. We stand flummoxed that these codes that have kept order have been violated. Arguably it has been a slow march to this current state, but its examples have been replete and we paid them no heed. All it takes is the bully in the playground to ignore the generally accepted rule of law and it all falls apart.

As before and always, we must be sensitive to, and cognizant of, the myriad personal responses that will arise from these events. This war will have a mental health impact on all people, especially those of the Ukrainian diaspora. Those who remember previous conflicts, and those who are experiencing one for the first time, will all be dealing with fear, stress, and anxiety, and heightened emotion will be present in the workspace. Focus and energies may be scattered. Even if you don't have answers, being present and available, and visibly supportive, will go a long way to fostering a psychologically safe work environment. Commit to compassion; listen and empathize. For employees with friends or family in the affected areas, recognize their need to prioritize personal or family needs, and provide them with the support to do so. We are all grieving.

Last week my comments were on how the Ukrainian people have shown us how to stand up to oppression and bullies. In a sense, as we begin to understand what has happened, I believe we are all Ukrainians. This war has demonstrated above all else life, survival, and freedom are most important, well above all the things we held dearly only three weeks ago. Throughout this we will need to be empathetic and always looking for the silver lining.

As you go into March Break and the likes, hold your families close, pray for Ukraine, and pray for our world that we step back from the brink and, most importantly, learn.

Steadfast, Vigilant, and Optimistic.

2 Year Anniversary of Covid

25 February, 2022

2 years ago everything changed.

The extent of the change, and its duration, was a mystery. Many of us truly believed this would all be sorted by the May 24th 2020 long weekend and we'd be back to normal.

This week also represents two years since I started writing these weekly missives. I am amazed I still have things to write about; however, the world of 2020, 2021, and now 2022, has provided many things to discuss and ponder.

I started writing these to add value to the mayhem of an unknown world for our clients. I intended it to be a quick take on a topic around thinking, leading, managing, and the general art of knowing your people and promoting their welfare.

As the pandemic continued, I planned "story arcs" or serials that would cover a range of topics relating to others over a series of weeks. However, "no plan survives first contact with the enemy", and many were the result of discussions with clients and the hot topics of the moment, and they became reflections of leading through the maelstrom.

I was heartened to learn that many of you forwarded them to your teams and colleagues. The distribution list continues to grow, and you continue to provide me feedback, insights, and Best Advice on what you've read. For this you have my enduring thanks and respect.

As we start the third year of "Managing the Maelstrom", these writings are joined by my soon-to-be-published book, "The Managerial Leadership Journey: An Unconventional Business Pursuit", which will be available in May. The book started as a compendium but quickly became a collection of what I've learned about what it takes to be an effective leader.

So, as the masks finally start to come off, the offices slowly crack their doors open, and the "new normal" of 2022 occurs; stop and pat yourself on the back for having made it through the most

challenging time of our generation. That said, the maelstrom continues, and new challenges appear daily that require us to be vigilant, steadfast, and always optimistic.

Have a great weekend, and all the very best to you and your family.

Office Triage

4 March, 2022

Two years of disruption and we are finally getting back to office. Mask mandates are ending, and everyone hangs on the edge of wonder. We wonder whether it is too soon or too late. How will it impact my family? How will it impact my team?

Over the last few weeks, I have worked with many of our great clients and have seen some interesting trends begin to show themselves. Most notably, teams are coming back together. In September last year, we thought we would all be back together within weeks, only to be hit by Omicron. Now it seems like the time is finally upon us.

There is a difference between being back in the office and deliberately coming together as teams. Some clients of ours are still working through how the workforce will come back to the day-to-day. Many have, and decided to triage based on the nature of the roles, and established these parameters broadly:

- Those whose roles must be in the workplace full-time,
- Those whose roles require them to be in the office for meetings and the like,
- Those whose roles do not at all require them to be in the office at all.

This triaging has enabled many of our clients to press a great reset button. It redefines the employment contract and has enabled organizations to get the roles performing to meet the needs of the strategy.

There is also cause for concern, particularly for those organizations whose employees who were working in the workplace throughout the pandemic. Covid has heightened the divide between the field and head office. In fact in many cases those who risked their physical health during the pandemic are generally lower paid than those of the head office who stayed home. I believe there is potentially a day of reckoning on the horizon. The workforce that gave so much when they were so needed will need to be considered as our businesses begin to return to normalcy.

The strife and the sacrifice of the First World War begat the Russian Revolution which brought about massive change. After the war with Covid, we may be in for yet another age of revolution, this time in the workplace.

So as we go forward, we need to keep in mind these things and plan and prepare for new disruptions amongst our workforce. Forewarned is forearmed. I hope this week gives you pause for thought as you consider the return to work. Next week we will explore the nature of bringing our teams back together and aligning them for the next steps.

Steadfast, Vigilant, and Optimistic

Strategy, Operations and Tactics

11 March, 2022

My intent in this week's longer missive is to help delineate what Strategy really is, using the war in Ukraine as an example. Too often, Strategy is a confusing word; however, with a little clarity, you can use it to align your organization.

The question of the day is what is happening in Ukraine? While I don't purport to have the answers, I would like to approach the situation from a perspective of the nature of thinking. As a disclaimer, let me point out that this is a very clinical and antiseptic representation of the present situation.

There are various experts who are attempting to give their insights based on their experience. I would suggest it is worthwhile looking at it from a thinking standpoint. Thinking has levels, and it is worth it to understand the nature of the levels to understand the current situation in Ukraine.

Strategy

By Strategy, I mean defining the end-state and the high-level goals and aims.

Many pundits suggest that Vladimir Putin's Strategy is failing. However, I believe that his Strategy is correct for his aims. I define Strategy as choosing what you want to do, and not how to do it. At the highest level, his best alternative to a negotiated agreement objective is to regain the Donbas, create a land bridge to Crimea, and ensure he doesn't have a potential antagonistic enemy in the form of NATO on his immediate Western flank. There are many that see it as regime change and, while he has suggested that, we cannot be clear on the intention of his Strategy. You can argue that the reuniting of "the Ukraine" with Mother Russia is part of the Strategy but, without understanding intent, you are left to guess work.

Consider in business that you must have a Strategy that articulates an end-state and, if you cannot articulate your intent, people will be unclear and unable to make their best efforts.

Operations

By Operations, I mean the broad ways and means to achieve the strategy.

Operationally, Russian troops have expended resources to turn aside efforts from the Southeast by attacking Kiev and various targets to draw us away from their Strategy, if it is the Donbas. Russian Operational Art is what has failed because, in a month, they have been unable to reach their operational objectives which are the methods by which Strategy is achieved. They are, in turn, resorting to what Russia does best, which is obliterate through artillery and missile attacks.

The lesson for business is the need to align the ways and means through operations to achieve your Strategy. Your Strategy needs to be clear and you need to have reasonably planned how you will operate to achieve your objectives.

Tactics

By tactics, I mean how we achieve the objectives at the lower levels of an organization.

Tactically, their troops on the ground have failed. This is a combination of poor planning for logistics but more importantly, a lack of command and control. The troops don't know where they are expected to go or what they are truly fighting for. Reports of morale and cohesion collapsing are everywhere. All you have to do is compare this to Ukrainian troops and the populace who are very clear on what they need to do.

The lesson for us here is that we need the Strategy and Operational planning but, most importantly, we need to empower the people with clarity to enable them to get on with their tasks.

Where Putin's failure here is actually a boon and relief for Ukraine, it does illustrate how lack of strategic, operational, and tactical focus can defeat even the most ambitious of plans. Grandiosity may galvanize at the start, but the illusion will quickly erode if the structure and intent is not there. Similarly in business, where charismatic leadership might launch the ship, it will sink without the framework and substance to bolster it.

Again, this is a very sanitized look at what is a difficult and traumatic situation, and does not represent the horrendous human toll of the loss of life, the loss of dreams and aspirations through the maniacal behaviour of the President of Russia. It can and it must be stopped.

Steadfast, Vigilant, and Optimistic

A Personal Message

18 March, 2022

This week's missive is short and without a business lesson/message. I am currently in France to visit the battlefields of my former army unit. This week reflects what I have seen and the feelings that one comes away with as you visit these hallowed places.

Whether it was the grave of Canada's youngest casualty, who died at 16 years of age in the Second World War, or the masses of pristine white Canadian graves, one cannot come away with anything more than remorse.

War is not an honourable thing; what people do in war often is. Take the case of our first commanding officer, who raised a regiment of one thousand and took them to Europe to fight in the First World War. I just visited his grave, where he lies far from home. He fell just before the main battle of Vimy Ridge while rallying his troops who were faltering in a raid on the enemy positions. He knew many more would die, but he stepped forward, leading from the front to push his soldiers forward. One shot from the enemy was all it took to fell him, and now he lies here in France with thousands of others.

War is a messy business brought home in this age by the BBC and CNN. However, new honourable people step forward every day. If you want to understand what it means to be Canadian, I encourage you to come to the beaches and Fields of Normandy, the town of Dieppe and of course, the field of Vimy. I learn so much about myself and the nature of leadership every time I come here.

I leave you with the epitaph one family from Saskatchewan placed on their son's grave. "Youth and strength to give from Canada's shore to a Dieppe beach to die. That we may live".

Have a great weekend and savour the fruits of the efforts of so many over the years.

Steadfast, Vigilant and Optimistic

A Shameless Book Plug

25 March, 2022

This week is a shameless plug.

It is a plug for my book, which was born out of Managing the Maelstrom through these weekly missives since the 13th of March, 2020. The missives led to many readers suggesting I compile them and turn them into a book.

While it looked sensible at the time, as I tried to create a narrative from many disparate parts, it was too hard to do. These missives have been reflections on meeting with clients, reflections on the week, or just general good management techniques that we have used with clients.

My book, "*The Managerial Leadership Journey: An Unconventional Business Pursuit*" is a focused attempt to bring light to three things that I believe are needed in our society today:

- The need for a profession of managerial leadership, as distinct from being an accountant or engineer who leads people – hence the journey is a lifelong endeavour of the sacrosanct covenant between the leader and the led.
- There is a need to understand the difference between leading and managing a team and leading and managing other leaders – the challenges of all realms in organizations are the lack of accountability and the need for the mid and senior management to drive it.
- Finally, this is a journey of continuous improvement – I have used my own experience as a consultant, as well as 34 years of service in the army, to show I made all the mistakes (and then some). Still, the key was continually learning and growing.

Over the next few weeks, the missives will take concepts from the book and use the days' and weeks' events to amplify the journey found in the book.

You can learn more at managerialleadershipjourney.com

The book is available now on pre-order at [Amazon.com](https://www.amazon.com) and [Amazon.ca](https://www.amazon.ca), with the electronic and paper editions available on the 17th of May. I hope you enjoy travelling on this journey with me because even though the book is written, the journey isn't done.

Enlightened Leadership

1 April, 2022

Last week I introduced my book, [The Managerial Leadership Journey](#), which can be [pre-ordered](#) prior to its May 17 launch. I also promised that I would be writing the missives for the next few weeks based on the book.

I wrote the book in the summer of 2021, having no idea of the surprising events of 2022. Were I writing it now, there is little doubt that the President of Ukraine, Volodymyr Zelenskyy, would be the case study for Chapter 5 on **Enlightened Leadership**.

In the book, I have delineated in detail the nature of enlightened leadership. I argue that there is a need for organizations to practice a new form of leadership where the sacred covenant between the leader and the led is sacrosanct. Key to this is the role of managers of managers to ensure that their leaders are practising it. Enlightened Leadership is made up of Authentic, Servant and Transformational leadership.

In watching President Zelenskyy during this war I believe he is demonstrating all three facets.

- Authentic Leadership is about having a heightened sense of self awareness. It is about being driven by a belief and set of Values. It is the absence of hubris. Zelenskyy is driven by a belief system – a belief in his nation and its people. The war isn't about him, in juxtaposition to the ego-driven Vladimir Putin.
- Servant Leadership is about caring for others and being there for others at the expense of yourself. I needn't remind you of his response when America offered to evacuate him. He has tied himself to his land and its people, and it is clear that what he does he does for those two things.
- Transformational Leadership is about leading through a vision and inspiring others with that vision to lead them forward. Zelenskyy arguably transformed the Ukrainian people to stand up to the aggressors. Whether he inspired them, or vice versa, what matters is that he is the face of defiance in the face of a bully.

History will be replete with leadership case studies about Volodymyr Zelenskyy. There is no doubt that this is his moment as an Enlightened Leader. It is light coming from the darkness and is meant to lead us to be greater selves.

For all of us, Enlightened Leadership is a journey and our moment will come. Our leadership will never be tested the way Zelenskyy's has been. However, even on the smallest of scales, if you infuse your leadership and the leadership of your leaders with the basic tenets of enlightened leadership, you will see success.

This is just one of the many milestones of [The Managerial Leadership Journey](#). This journey propels us to be our best selves.

Have a great weekend, Slava Ukrainie.

Leader Self-Care

8 April, 2022

Many thanks to all those who have pre-ordered my book prior to its May 17 launch. I have learned something about the Dark Art of launching a book and the importance that pre-orders have on its launch prospects.

This week I am continuing to explore topics from the book. This week's is timely because it is Mental Health Week in Canada. I had the opportunity to be on Parliament Hill for the Sam Sharpe breakfast sponsored by Erin O'Toole and Romeo Dallaire as the national patron of Wounded Warriors Canada.

In Chapter 7 of [*The Managerial Leadership Journey*](#), I wrote a piece on Leader Self Care, which includes mental wellness. The speaker at the luncheon spoke at length about the impact of sanctuary trauma on him and how it affected his PTSD. Sanctuary trauma is where those injured from mental trauma have their trauma reinforced by an uncaring, unsupportive environment when they return to work.

While I wrote about it in the book, I thought about its implication in the whole return to work climate. Those who have suffered emotional trauma over the pandemic will come back to work, and the wounds will be invisible. If they come into an unsupportive environment, matters will only get worse.

It is a complex issue and not one I can do service to in this short missive. What we do have to do is realise things have changed. As we say, not *everything* in Covid changed, but *everyone* has. So here are a couple of steps:

- First, recognise this is a very real issue,
- Second, take time to understand what the nature of mental trauma is,
- Third, practice empathy and use all your senses to observe where your people are, and
- Fourth, know your people and promote their welfare – engage with them and truly understand their journey

These are just a few steps: there are many more. Also, remember leader self-care – how are you feeling and where is your emotional energy sitting? We are told to put our oxygen mask on first before

helping others for a reason, as you can be no help to anyone if you are a casualty yourself. As Romeo Dallaire said, *mental wellness is an issue of leadership and nothing more.*

Take care of yourself; others depend on it. In that vein, relax and spend time with family this weekend.

Steadfast, Vigilant and Optimistic

Accountability

15 April, 2022

This week's missive is an insight into one of the most critical and fundamental elements of my book – **Accountability**. Those that know me know that accountability is something that we at Forrest have advocated for many of our 35 years.

As my colleague Chris Corrigan put so well, the issues of today's society result from a lack of accountability. This is where the meaning of words becomes essential.

By **accountability**, we mean the objective, external relationship between the leader and the led, and the clarity that brings. This is different than **responsibility**, which is an internal, subjective feeling of obligation.

The essence of accountability is being held to account by someone; whereas responsibility relies on my personal feeling or beliefs. While laudable to have personal feelings of obligation, we are all different with different experiences and beliefs, so it is hard to rely on us all having the same set of values and bringing the same commitment to the work.

Accountability is not about punishing, rather it is about clearly defining what is expected. In leadership, it is about the leader defining the following:

- Setting an expectation for behaviour.
- Defining the work you expect someone to do.
- Providing the resources to help them do it.
- Checking in and then coaching them to assist them, and, finally.
- Following up and assessing how well they worked, and applying the appropriate incentive based on their success.

Arguably, the last bullet is what has failed to happen in our society – we have failed to hold people to account. Whether they be politicians, corporate executives, or many other examples, we have failed to hold them to account for their behaviour.

As a leader ,though, we need to follow all of the steps, so ask yourself whether as a business leader, a parent, or anyone involved in caring for others – have I put all 5 steps in place?

If you want more detail on this delineation between accountability and responsibility, I suggest you read **Chapter 3, Application of Managerial Accountability: the Core of Success** in my new book [The Managerial Leadership Journey](#), which releases on Tuesday, 17 May.

Have a great weekend and enjoy the beginnings of spring.
Steadfast, Vigilant, and Optimistic

The Managerial Leadership Journey

22 April, 2022

This week was a momentous week. After months of writing and edits, my book – [The Managerial Leadership Journey](#) – was finally released. I give many thanks to all those that pre-ordered because, on Tuesday the 17th, it also sold out in Canada. (It is still available for [download](#), but it will be available later in June for those who didn't pre-order. It is also available through Amazon.com in the US for those still wanting a quick turnaround with less than a week's wait.)

I thought this week's missive should address the three key themes of why I wrote the book.

As background, the book is a compendium of the work of Forrest & Company. It is a reinforcement of all that we do as we try to fulfill our mission of "*helping to create great places to work that deliver the organization's strategy*". My three thrust lines are:

1. **Managerial leadership is a lifelong learning and is a profession unto itself.** We are too quick to be technocrats of our skills, whether IT, Finance, or Operations. Once we are thrust into the role of being managerial leaders, we need to take it seriously and continually learn if we are to be bestowed the sacrosanct role of leading other human beings in their life's work.
2. **The issues that face all organizations are from bad management.** I have taken an old axiom and reinforced it – "*there are no bad organizations, only bad managers*". What differentiates my approach is that it is a book designed for the manager of managers or the leader of leaders. For it is this group that usually gets ignored in business books, and it is this group that defines whether or not there will be good management.
3. **Finally, the book is about reflection,** and this ties to #1. As on a journey, we need to take the time to think and reflect. Every day I come across leaders who are too busy in the *Tyranny of Do* to take the time to stop, reflect and *THINK*. We are too busy moving to the next bound in our goals. As a result, I have built a set of reflection questions at the end of each chapter. We also have them available for download at the book's [website](#). My hope and desire is that the book will stir thought and drive contemplation. We need leaders who pause and consider, and the further up we are in the organization, the more important that becomes.

I tried to make the book as tight as possible with 235 pages. I hope you find it approachable and, while it was to have been a collection of these missives, if you have been following them over these last two

plus years, they cover a wide swath of topics and make it hard to create a common narrative. Instead, I started from scratch, but you will see the themes of past missives appear before you.

I think it is full of tools and tricks as well to help you in your leadership explorations and, rest assured, if you go down this leadership path we will be with you on your Journey.

Have a great long weekend and relish the fact that we are one of the most progressive constitutional monarchies in the world that celebrate the birthday of our Head of State – Happy Victoria Day.

Steadfast, Vigilant, and Optimistic.

Manager of Managers

29 April, 2022

It is always heartening to get feedback and responses from these missives. Last week I talked about the three reasons I wrote the book [The Managerial Leadership Journey](#). One of the reasons launched a couple of questions about the importance placed on the **manager of managers**. I got a great question: Why did I think this was such an important point?

First off, not many books talk about this critical role yet, at the same time, they wonder why organizations are not more successful or behave unreasonably. To me, the root cause of these two issues is the same. It is poor managers of managers. I believe if we wonder why we don't have a successful manager, the root cause likely rests with their boss.

There is a paradigm shift here. As I say in chapter three, the reason for this breakdown is a lack of accountability. If the manager lacks skills, knowledge, or behaves abominably, it is not *their* fault. Rather, it is *their manager's* fault.

So, first and foremost, the manager of a manager is important because they ensure their Direct Reports are good managers. In other words, the failures of culture and organizations can easily be laid at management's feet.

Furthermore, the managers of managers are the ones that must look at the development of talent. Far too often, we ask a manager who is in the thick of things to hire their replacement. However, besides the fact that the manager is running and has no time for this, there are logical reasons why it cannot be the manager's role.

The manager of managers is in charge of talent development because:

- They know the true expectations of the role in the context of the larger organization.
- They have a bigger picture of the talent issues and needs.
- They understand more of the opportunities and challenges there are for talent.

I, obviously, go into a lot more detail in the book, but ask yourself this question about the pain we feel in our organization; Is it because our managers of managers are not holding their Direct Reports to account and perform their role?

So take a look around your organization. How effective are your manager of managers and what might you do about it?

Steadfast and Optimistic.

Employee Retention

6 May, 2022

Retaining employees is a topic that came up several times this week from many different and unlikely sources. It is linked to the looming challenge of a volatile workforce where it is hard to hire employees. Many of our clients have seen that this volatility is one of their biggest issues as we go through new phases of the maelstrom.

I believe the retention issue is rooted in a mantra I have been saying for a while; in Covid, not *everything* changed, but *everyone* did. We have a workforce now with very different expectations than two years ago. We see volatility everywhere combined with uncertainty, complexity, and ambiguity. We are living in the truly VUCA world.

So, how to deal with it? Traditional thinking says the root is the employee. In a sense, this is true, but the way for businesses to deal with it is through good management and true leadership, what I have referred to as “managerial leadership”.

Chapter 5 of my [book](#) is all about Enlightened Leadership, where managerial leaders practice authentic, servant and transformational leadership.

- **Authentic leadership** is knowing yourself and having that sense of the true self. Knowing where you stand and what is important to you helps you decide how you will deal with the challenges that befall you.
- **Servant leadership** is about leadership's golden rule: "*knowing your people and promoting their welfare.*" It is the foundation of caring for your people. You can't retain anyone if you don't care and know something about them.
- **Transformational leadership** is about always making things better. You retain people by continuously improving their situations, by being all about transforming from where we are now to our future desired end state.

Finally, to get this in your organization, you cannot solely rely on your managers to create the change themselves. Instead, *their* managers must lead them and steer them in this direction. So, in a nutshell, if your managers lead their direct report managers to be authentic, servant, and transformational, you

will have a better chance of retaining your employees because you will have created a great place to work.

Give it a try and send me feedback on how it works. After all, we are all in this together.

Steadfast, Vigilant, and Optimistic.

Return to Work Trends

13 May, 2022

This week's missive reflects on trends we see at Forrest & Company and with our clients. It is tied to Return to Work and the result of organizations coming back together. Over 27 months ago, COVID created the Great Expulsion of head offices. In other cases, those in the field hunkering down to complete their work faced threats to their health.

Now that organizations are coming back together, they are experiencing three trends. The trends all come from COVID and now, ultimately, the new uncertainty in markets fueled by supply chain challenges, war, and now rampant inflation.

These are the trends we are seeing:

- **The need to redefine work.** There are two facets here. One is that the emptying of offices and working from home has left people wanting to stay home. In some cases, there is a reluctance to return to the old way. The second is that organizations must clarify work in a way they hadn't had to before. Role clarity has become paramount.
- **The divide of field and head office.** There is an undercurrent in those organizations that have a workforce in offices, factories, or the field during the pandemic and those who had a head office whose people worked from home. There is looming discontent for those who were paid less but risked it all and those who stayed home. It continues to simmer now as organizations start to come back, and has reinforced the divide.
- **The "New Me" era.** This is linked to redefining work, and the idea that people now have very different expectations of their employers. It is much more about "*what are you doing for my world?*" than "*what have you done for me?*" We see this with renewed focus on the Environment, Social, and Governance (ESG). This is not just the focus of investors; they are becoming very important to a New Me.

So, what to do about these? As I argue in my [book](#), Strategy is your North Star; it points the way. The first thing is get very clear on your Strategy. Not your plan, but who you are as an organization – what is important, what is your purpose, and where are you going?

If employees understand this they will make clear choices. Some will stay and some will leave but there will be clarity to aid their decision. Clear articulation of Strategy means you can then properly structure your business. Now, more than ever, you need to be clear on what your organization stands for.

Redefining the work will save you money but ensuring your structure is tied to your Strategy is truly the key to success. Finally, just like the New Me era, defining who you are, how you are organized, and what is important in the realm of ESG will help people make their choices.

If you don't look at Strategy and structure now, it is clear to employees you are "just mailing it in" and doing things the same old way. By doing this work, you may not change, but you have done the necessary thinking work to confirm who you are, and how you show up.

If you don't have the purview to define these three things for your organization writ large, do it for your team and engage them in the discussion. You will be amazed at how it pays off. Great leaders share their thinking: their hopes, dreams and aspirations. It connects them to their people and helps their people to navigate in these turbulent times.

Take the time now as we enter into the good weather to do the heavy lift thinking – it will pay off in the long run.

Steadfast, Vigilant, and Optimistic.

The Next Revolution

20 May, 2022

I have a premise, which I shelved for a bit with the invasion of Ukraine, but it came up again this week. Over one hundred years ago, when the Spanish Flu appeared, there was an event that was a reaction to long-standing issues and the First World War. It was the Russian Revolution. I likened that what would happen coming out of Covid would be like the next Russian Revolution. In this case, it would be in the West and not necessarily impact Russia. With the Russian/Ukrainian war I stopped referring to it, caught up instead in the humanitarian disaster of modern war.

This week I went back to it. Because it struck me, when explaining it to one of our clients, that I realized it was coming true.

I refer to it as the next Revolution because, like the first one, it would create massive change. It would tear apart all the established norms and expectations just as the first Revolution had imposed new societal expectations and standards. For months I have been saying the next Russian Revolution would see the tearing down of all the institutions and frameworks and would, of course, occur after Covid. What I hadn't reflected upon was that the change was already upon us.

Every existing institution has been challenged in this new era. History has been toppled, government institutions have been found wanting, churches have been embarrassed, and our very existence as a nation has been called into question. While it has not seen the bloodshed of the first Revolution, it has rocked pre-existing institutions to the core. There is a massive calling into question and change. Because we are in the midst of it we may not realise it, and we certainly have no sense of what will be on the other side.

My intent is not to judge these changes but to describe them. So, what does it mean going forward? For business, which has been relatively unscathed in this change, it is still left to be seen. Arguably the Revolution of "the new work" or the changing expectations of employees could be the start.

Here are some ideas of what may happen for business:

- Leaders will come under real scrutiny. The phrase "*what have you done for me lately?*" may be the number one question.

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- Executives, like leaders, would be under even more examination, especially if it is perceived they got fat at the expense of the workers
 - Work will need to be presented as meaningful and engaging to get employees interested.
 - As I said last week, the divide between the "head office" who can continue to work from home and the field forces, who could never work from home (and were usually paid less), will widen.
 - People will expect that they are appropriately compensated for what they give up of their lives to the business.
 - Organizations that are not good stewards will be seen as pariahs. This will be the case for the environment and social issues.
 - Integrity will be the watchword. Do we walk the talk or talk the talk?

I may be very wrong in my assessment but, given all the upheaval we have seen in society, I can only expect that business institutions, whether for profit or non-profit will be under inspection from the masses.

The ideas above are not guaranteed but, if you wish to mitigate the potential risk, it may be worth it to heed each of these. Covid has brought much change and will bring more. It has become an accelerant.

As a final note, we are entering a very dangerous stage in the war in Ukraine; that of apathy. Public attention is turning away when we need vigilance and reminding that this fight is for freedom from tyranny in the face of an internationally dangerous bully. Ukraine's fighting is the fight of all of us.

Steadfast, Vigilant and Optimistic

The Profession of Managerial Leadership

27 May, 2022

Well, as many of you know, last night was the book launch for [The Managerial Leadership Journey](#) here in Toronto. It was great to see so many friends, colleagues, and clients in one place, and thank you to everyone who made the trip – especially surprises from Vancouver. Today's missive is a bit of a repeat of what I said last night, but I believe it bears repetition as we go into the weekend.

Last night, I explained why I wrote the book and what it means to me. For one of my main premises, I argue that we need a profession of managerial leadership. Managerial leadership is the most common role, whether in the private or public sector, for profit or not-for-profit. It is a part of everything we do in society. Yet, we don't take it seriously. Too often, I hear, it is done off the side of one's desk in favour of our "real" profession – be that lawyer, accountant, craftsperson, etc.

We need managerial leadership as a true profession because there is a sacrosanct covenant between the leader and the led. In this exchange, we ask people to do work for us and, often, that work takes them away from all the other elements of their lives. If you wonder why so many things are currently going wrong, whether in airports, hotels, or restaurants, it is that people realize (and are now being vocal and proactive about) that their other lives are truly important, and this job is not the be-all and end-all. As managerial leaders, we have to live by the covenant when we ask people to spend more time at their work than with their families.

The profession needs to be about growth, commitment, and discipline. As I suggest in the book, it is a journey where we continue to grow and learn along the way, ever developing our capabilities. There needs to be a commitment to people and the strategy, and to balance those two needs. In too many cases, however, we see only a commitment to the all elusive dollars and power. Finally, it needs discipline and "stick-to-it-iveness" in the face of adversity, just as importantly on the bad days as the good.

The glue that keeps managerial leadership together is accountability. In previous weeks, I have argued our world lacks accountability. Accountability is not just a negative; it has positive consequences as well. Because of our lack of seeing managerial leadership as a profession, we don't focus enough on accountability.

Managerial leadership as a profession is a tall order for our society but, I believe if we take it seriously, we can have a much better world. Take the time this weekend to consider all these elements and whether you and the people around you want to participate in the journey.

Have a great first weekend of summer. All the very best

Steadfast, Vigilant and Optimistic

Independence Day and Canada Day

3 June, 2022

This will be a short missive this week, arriving a day early. This is, of course, the weekend of the birth of two nations of North America; Canada Day on the 1st of July, and Independence Day on the 4th of July.

What to write at this time in the history of these two nations?

First, these dates represent the creation of two countries in the European construct of nation states that tumbled out of the Treaty of Westphalia of 1648. But what is a Nation? I believe it is an idea. They are ideas embodied in constitutions that set out those nations' intentions. Now, ironically, those ideas at times were archaic and misbegotten, but they create the tapestry of our very lives and essence. There is no doubt this nation forming was a grab at indigenous peoples' land by Europeans carrying out what they had experienced in Europe over centuries. It isn't an excuse, merely an explanation. In both cases, the groups that formed those nations did so as they tried to escape from elsewhere, and their will to power meant they took from others.

These nations have made mistakes, as they are made up of human beings with all the imperfections and foibles of our species. It is those people who created the ideas and spurred on others. They created a hegemony of commonality.

So, as we go into Independence Day and Canada Day, let's try to remember what brings us together and not what tears us apart. Let's try to remember the good in all of us and that we are all merely trying to be happy.

As a leader, it is incumbent upon you to be cognizant of how current events can affect your people and what that might mean for their mental health and your work environment. As we learned during the pandemic, psychological safety must be a priority for any leader of people. The best way to approach these is not to wade into the politics of it all, but to foster a workplace that is supportive and inclusive, allows honest and diverse dialogue and opinions, provides coaching and employee support, and actively upholds corporate values

So, let us be happy and hopeful as those in 1776 and 1867 intended us to be. Let's be thankful for what we have and not fear what we don't. Let us all rejoice that while there are still many challenges, we will face those with the same determination to do good and right as those who did before us.

Happy Canada Day and Independence Day. I hope you and your family can have a great long weekend.

Steadfast, Vigilant, and Optimistic.

Strategy Articulation for Retention

10 June, 2022

Some of the language here is Jerry Rhodes but the message I believe is important for everyone in coaching and consulting.

In talking with clients this week, there seems to be a trend on everyone's lips, and it is all to do with employees. One client refers to this as the "candidate's market". So, the topic of the week was about how do you engage your employees in the face of RTW (return to work) and a market pulled by great resignations on one end and another where the employees are asking what have you done for me recently?

I had a couple of questions from them about what others are doing, and what is right in this currently volatile, uncertain, chaotic, and ambiguous (VUCA) work world. I am afraid my answer, while not particularly sexy, was pragmatic.

Focus your energy on the articulation of your Strategy.

Now to be clear, I have a very specific meaning for Strategy it is not a process to get somewhere as in high-level planning but rather the articulation of the long-range of what we stand for, what is important and where we see ourselves. Too often, organizations default to the former, where the energy translates a decision made into a series of related actions through time, that will mobilize energy around its events, organize all resources, and reduce uncertainty despite unknowable changes.

In short, plans assure the successful achievement of your purpose. Whereas the forming of Strategy is done at a high level to envision the spiritual direction of the business, recognizing the next level of achievement that will realize its true nature. It is the definition of purpose.

Strategy is important because it defines what is critical to the organization and what is at its core. It includes an examination and enunciation of the following:

- Vision
- Mission
- Purpose

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- Values
 - The unique, sustainable competitive advantage
 - The driver of the business
 - The high-level goals and objectives and
 - The structure.

If articulated well, it becomes the foundation of the customer value proposition, and in the VUCA world of today, it defines the employee value proposition.

What gets in the way these days of organizations doing this are three things:

- An assumption is that Strategy is a plan and “*we did that vision mission values stuff a while ago, and it hangs over there on the wall*”. The issue with this is that it is likely not clear has become old and crusty, and worse of all it is not being translated into action by middle management.
- “*We can’t possibly define who we are because the world is changing so much every day*”. The adage that if you don’t stand for something, you stand for nothing comes to mind. You need to project what is your North Star and then shoot the bearings off it. Sure, things will change, and you may have to adjust but you need that direction.
- Finally, the biggest issue is risk aversion and this ties to #2. We are unwilling to make calculated risks out of a misbegotten sense of perfectionism. We want it perfect and there is too much risk in selecting a Strategy; “*what if we got it wrong?*” You will be wrong from time to time, but the role of the managerial leader is to manage risk. Sure, risk begets fear, but you need the intestinal fortitude to think it through.

Today’s employees need stability and a sense of where they work, who they work for, and what that work stands for. They need to understand what the spirit of the organization is they belong to. This is the only way that they can become engaged.

So, if you are wondering how to have the best talent, stay with you and to attract top talent, give them something they can believe in, tell them the story of what you want to be. It may take you some effort now to articulate it, but it is a journey worth taking because it will breathe life into your organization.

That is my advice for the week, the month and the year and those years to come become crystal clear on who you want to be when you grow up.

I have gone on too long here and can go on further, so if you want more clarity, give me a shout.

Have a great weekend.

Steadfast, Vigilant and Optimistic

The Failures of Managers of Managers

17 June, 2022

One of the reasons I wrote [The Managerial Leadership Journey](#) was that I believe there is a dearth of writing and dialogue about the critical role that Managers of Managers play in the successes and failures of their organizations.

As I reflect on the past weeks' and months' events for two Canadian Corporations – Air Canada and Rogers – I couldn't help but think that these were clear-cut examples of, in all likelihood, failures of Managers of Managers.

To be clear, in the book, I re-worked Field Marshal Slim's famous quote into, "*there are no bad organizations only bad managers*". To those outside Air Canada and Rogers, it may look like these are bad organizations but they are made up of people, and people are led by their leaders.

To deconstruct this, I believe that the executives of both organizations had no intention to inhibit air travel or collapse a national communication network. So, the issue is likely between the Front-line and the Executive. While the problems may be at the Front-line, their intention was not to disrupt; the situation at hand is how they were being led. How were the Front-line managers led if not by the middle management? The failings there are not at their feet but rather at their Managers' feet (except in the circumstances where employees have knowingly and willfully set out to disrupt).

The problem is that their Managers fail because they are not fulfilling their accountability to ensure that Managers are *good* managers. Middle Managers, or Managers of Managers, fulfill their accountabilities by:

- Setting clear context and assigning tasks
- Listening and acting upon, if necessary, the feedback of their Direct Report Managers
- Monitoring the work of their Managers
- Coaching them and adjusting their tasks where necessary

In the book, I also argue it is the role of the Managers to practice continuous improvement. The tool to do this is the After Action Review. After Action Reviews are a systematic approach to determine what happened, and why. In this way, middle Managers can ensure it doesn't happen again.

In the end, time will tell what the causes were, but I would add this – it likely had something to do with the thinking at various levels in the organizations. The After Action Review will clarify this but it is the Manager of Managers who needs to assess how effective their Managers have been in their thinking.

There are always lessons for continuous improvement but, as Bismarck is purported to have said, *“fools say they learn from their mistakes; I prefer to learn from the mistakes of others”*. So, take the time now to consider the capability of, and effectiveness of, your Managers of Managers before you find yourself caught in a circumstance that could have been prevented with the application of good managerial leadership.

Have a great summer weekend.

Steadfast, Vigilant, and Optimistic

The Nature of Leadership

24 June, 2022

In the [Book](#), I go to lengths to describe the nature of **managerial leadership**. I define “Managerial leadership” as that leadership exercised by those in management positions. It is the integration of tasks and people, and I posit that one is not better than the other, but they both need to be exhibited by those in managerial leadership positions.

This week I was reminded by one of our associates, Jane Graydon, of the nature of “leadership” by itself. While I gave it a fleeting glance in the book, Jane’s conversation got me thinking.

What of those who have that innate leadership capability but are not in positions of authority to practice it? What of emergent leadership? How well do we recognize that ability in someone who, by virtue of their current role, doesn’t have the chance to shine?

I believe this is often the purview of youth because they don’t get that chance to lead others but may have the characteristics that make them great leaders – able to influence others to achieve a goal.

The Army has a unique approach to this. Young soldiers are continually assessed for their leadership traits. Some do, and of course some don’t, and some look like they have it, only to find out later that fatal flaws have ruined their potential.

So, as you read this, think about those that may be getting overlooked for leadership opportunities. Are they overlooked because they aren’t like our model leader? Are they ignored because they don’t look like us? Are they forgotten because they haven’t gone through the school of hard knocks like us? Are they overlooked because they don’t have the experience? As you can see, this is why diversity, equity, and inclusion are so important in our world today.

Leadership can be learned, but it must be valued. Also, I believe it does not require any work experience. In the Army, soldiers are tested for their leadership potential with “small party tasks”: getting the parachutist out of a tree; changing a vehicle tire without tools. All of these don’t rely on experience. They rely on judgment, creativity and, most importantly, the ability to connect with others.

So, as you reflect this weekend, look about you for the diamonds in the rough. Look at friends and family, where the leaders are, and how you can nurture them.

Steadfast, Vigilant and Optimistic

True versus Right

1 July, 2022

Where has Truth gone?

This may be a deep topic for a long weekend, but I have been ruminating on it for a very long time.

It seems that we have lost an understanding of what Truth really is. For those who know me, I have spent much of my career on thinking, particularly the intentionality of thinking, and it is clear to me that, in our current world, we have lost sight of the difference between what is Truth and what is Right.

The two terms have become conflated.

As I watch the news every day, the difference between these two thinking intentions seems to be indistinguishable. By Truth, I mean an immutable fact, a reality that is either happening or has happened. It is usually an empirical, observable fact – it either did or didn't happen. Now we can't leave definitions here. When I mean Right, I mean an interpretation of those facts and opinions expressed as right or wrong, good or bad.

Truth is neutral; it is void of opinion, and it is void of judgement. What I see around me every day is judgement, however. Judgement, these days, is laden in values or what is important to others. Unfortunately, Truth has been squeezed out.

Whether Covid has exacerbated the situation or not, it is clear that we are thinking based on our beliefs, and those beliefs are becoming more divergent and polar.

The best example of polarization is in what is supposed to be that bastion of Truth, the media. Throughout history, the news media has leaned and chosen sides. I believe the challenge for our modern society is to find the Truth. Social media has all but obliterated Truth. It has made it impossible to divine the real Truth. The advent of "like" buttons has sped this process up and made it hard for us to distinguish real Truth. In fact, I believe because it matches my beliefs that what my feed shows me is the Truth. If I go to the news media, I either find supporting ideas or, if I find contrarian views, I ignore them.

Furthermore, the internet has meant that we can find any proof to support our view of the Truth. Everyone with an opinion on a subject has a venue to express their bias and find a likeminded audience.

I could write forever on this subject, and perhaps it is just my belief, but ask yourself this: what news outlet gives me the most unbiased, balanced view? If you find one, please tell me, because I feel I can't find it.

The solution to this is to challenge that which purports to be the Truth – be cynical and question. Seek counter arguments. Look for the source. Demand the adherence to Truth, not to hearsay and not to someone's opinion. Question those things that you see, hear, or sense. We need to get to the Truth and, by relying solely on that which fits our opinions, we diminish our perspectives.

Have a great long weekend of pondering.

Thinking: The Undiscovered Country

8 July, 2022

Thinking: The Undiscovered Country

Last week I pondered where Truth had gone. For those that saw through it, I was really talking about how our collective thinking has changed. So, this week, it is time to tackle thinking head-on.

By thinking, I mean, "how do we use our whole self to do or not do something?" It is a broad definition but, as I argue in [the book](#), thinking gets short shrift.

Thinking in society, business, and organizations is an undiscovered country. It is complex, so we prefer to rely on assessing and focusing on behaviour because, after all, it is visible. We don't spend the time to develop thinking in our world.

Instead, we rely on our experience and past behaviours as our guide. This, of course, is fraught with problems and the best example of this is our experience with Covid. In this case, we couldn't rely on our experience unless we were in the Spanish Flu pandemic of 1919. Instead, we had to think through the situation to figure out how to close offices, handle bed shortages, manage long-term care, and then sort out how to return to workspaces.

We must acknowledge what people did with little or no experience and how they thought through the problem. But we can't rest on our laurels. We need to realize that what we need to encourage is critical thinking and not just reliance on, or rote behaviours based on, those past experiences. We need to challenge our old thinking and think in new ways. We need to encourage people to explore their thoughts and feelings, and then give them frameworks to think through their problems.

In our research on our client's thinking, we have yet to find two people with the exact same profile. This means people see the same things but process them very differently. We need to embrace that diversity of thought and not crush it. Diversity of thought is truly the ultimate diversity. It transcends diversity of experience, culture, and physical characteristics.

We have to acknowledge that we tend to gravitate to those that think like us because, by and large, it reduces conflict and makes us feel safe. We need to embrace differences in thought because, without it, we get "group think". After all, without that diversity of thought, we may not have survived the recent crises.

So, as you go into the weekend, ponder these three thoughts:

- Do we truly embrace differences in thinking?
- Do we encourage others to speak up to share their thinking?
- And, most of all, do we listen and acknowledge that others have the right to think differently?

Thinking is an undiscovered realm, and our world needs better thinking.

Have a great weekend, and I hope this has given you pause for thought

Steadfast, vigilant, and optimistic.

A Personal Experience

15 July, 2022

Allow me, this week, to share a very personal experience. This past week I had the true honour of being present for an event that continues to impact me. On Sunday, I was present for the installation of the new Moderator of the United Church of Canada. Carmen Lansdowne has been our client but, over time, has become a very close friend. This past week she became the Moderator of the Church and the first Indigenous woman to hold the role of the spiritual leader of the Church. This was truly a momentous event.

I am not a religious person. Like all soldiers, I believe that “there are no atheists in a slit trench” –slit trenches are what we call foxholes in the Commonwealth – but yet, I have not had much time for organized religion. As you may have guessed, I prefer to challenge institutionalized thinking. I left the events gobsmacked on so many levels.

Carmen has opened my eyes, over the years, to issues such as systemic racism and, particularly, the plight of our First Nations Peoples. While my father raised me in a household where I had exposure to the predicament of the First Nations, Carmen has added to my understanding and empathy.

Regardless, what I experienced this past week went beyond that. Understanding is one thing, but what I experienced was transcendental. What I received from a portion of our society was nothing short of transformational. Speakers, and the members of the Church, openly related the racism they had experienced, not just as Aboriginal People, but those suffering from anti-Black racism, as well as systemic prejudice for those of our society challenged by being different.

What was truly profound, however, was the grace they displayed. In the face of all the experiences they, and those before them, have experienced, they were seemingly not bitter but demonstrated that they could forgive past events so long as we make sure it can never happen again, and that we truly learn as a nation from what has happened and is continuing to occur.

The message for me was clear; in the face of all that had happened, they could overcome this. (To be clear, we have much to do to right the wrongs.)

Our world needs more of this ability—the ability to transcend previous wrongs and right the current wrongs. But, most importantly, we need to make right what *was* wrong. We need to make reparations. This was not a moment in time; this is something we need to consider every day. It is not merely a moment of protest. Now is the time for us to take matters seriously.

As a member of society who is fortunate by the manner of my birth and background, I am newly resolved and committed to doing what is right. I encourage all of us to step up and consider for a moment others who have been downtrodden, and be empathetic and sympathetic to the past and current struggles.

As we get back to our old world, now is the time for us to be active and improve it. Caring for others and the earth that we inhabit is the starting point. Too quickly, we will get back into a rat race and now is our time to consider others.

I continue to process the events of last week. I still have much to do but, hopefully, I have shared some of my challenges this week.

As you go into the weekend, I encourage you to join me on the path to understanding and reconciliation. I cannot hope to convey my thoughts and feelings in a few lines, and I will likely have not represented them well, but I reaffirm our world needs empathy and sympathy and to realize that there is a grace that transcends all.

The Risk of Choice

22 July, 2022

First, thank you to those who took the time to write back after last week's missive. If you missed it, you can read it below. As I said then, I continue to process the events. So, for this week, I thought I would take a lighter tack.

Everyone faces an issue that I feel has an unseen hand in much that goes on in our world – **Risk**. At Forrest, we have begun to develop a robust risk practice, bringing in two well-recognized experts in the field, our associates Rob Quail and Marc Tassé.

However, the risk I am focusing on this week is one we all face daily. It is the risk involved when making a choice. I believe that this risk greatly impacts our day-to-day lives and, in many cases, we don't realize it.

My good friend and mentor, Jerry Rhodes, says it well; "what hangs over every decision we make is the shadow of risk".

What I find interesting is that in my line of work, when speaking with clients, until I point out they really need to stop and assess the risk in the decision, they are unconscious of it. Furthermore, when I ask them if they have a framework for determining the risks of a particular choice, they often do not. So, we have a combination of a lack of *thinking* about risk and not having a way to *assess* risk... which is the perfect storm.

The signs of this particular combination are the following:

- Lack of decision making characterized by cries of "we need more data!"
- A tendency to deflect and push decision-making up the chain, feeling that "the boss should really decide this".
- An awfulizing and catastrophizing mindset focusing on what may happen: "this, this, and this might go wrong."

Ultimately, unchecked risk becomes fear, which can paralyze people and organizations.

The natural human reaction to risk is trying to gain certainty through data and information. This search for the truth in data or observation is a falsehood and leads to procrastination as we don't set level and dig down endlessly.

So, ask yourself how comfortable you are at assessing risk. How comfortable is your organization with evaluating risk?

These two questions lead us to determine our risk appetite. However, at the core, we need to take the risk imposter apart and assess it for its likelihood and severity. When we get good at this, we lift the veil, and we can begin to move forward in our decisions.

I can go on at length here about frameworks and the like, but our first step needs to be awareness of the need to recognize that we may be struggling with risk, and then apply our thinking to make judgements and predictions.

Have a great summer weekend.

Reputational Risk

29 July, 2022

I will continue where I left off with last week's topic this week. While I talked about what makes us not assess risk, and how it relates to fear, this week I will wade into the depths of **reputational risk**.

As an individual or an organization, we need to always be assessing risks to our reputation. The issue is that reputation is a currency; it is the currency of trust. All it takes is one insinuation, one story told, and our reputation is damaged unalterably.

In leadership, if we damage trust, it is very hard to retrieve. Hence why Stephen Covey referred to a "trust bank" – we always need to make deposits because one day we will end up making a withdrawal, which could be catastrophic for how we are perceived.

I chose to discuss reputational risk because, in Canada, we have seen many cases where corporations and politicians have eroded public trust. This week, in particular, we have seen an example that has gone international and will likely be the stuff of MBA case studies for years to come.

I am referring to the termination of Lisa LaFlamme, the anchor of CTV National News and a much beloved public figure. I have no inside track on what transpired, however, there has been much supposition in the international press about this, for example:

- Was it really because she had let her hair go grey?
- Was it that she stood up to her managers, believing she was right?
- Was it a case of ageism or sexism in Corporate Canada?
- Was it the case of a misogynist male manager who needed to silence someone who dared question his authority?
- Or, was it a legitimate business decision?

We shan't know the truth but, in the realm of the modern age of "isms", it won't matter. The image is damaged. Frantic scrambling to state an investigation will take place will not win anything back, especially when other corporations have leapt into creating images and messages to capitalize on the situation. Regardless of what an investigation might find, the damage is done.

I am using this as an important lesson to all of us in the Covid / VUCA (Volatile, Uncertain, Complex and Ambiguous) world. The world is a tinder box, and we must pay attention to how our actions will stand up to scrutiny. We must do what is right with humility and not hubris because we will be pilloried in the current court of public opinion.

The risks to our organizations abound if we don't hold our management accountable for being good managers. They are huge. We must set the right tempo, cadence and, most importantly, manage our behaviours. It takes little to call into question, but the ability to recover can take years. On top of that, the internal turmoil created in the wake of this is equally damaging. This is the case, especially in the "war for talent" and to halt the present trend of "quiet quitting".

Obviously, I don't know what happened in Lisa LaFlamme's case. On the one hand, I can believe a business decision was made, but because of grey hair, – really? But then I am part of that demographic that doesn't get it. For this I am forshamed, but I am obviously not the only guy in that. The fallout has been eye-opening yet again for me.

On a personal note, I have tremendous respect for Lisa. She interviewed me years ago and got my support when she traversed with our troops in Afghanistan. Furthermore, the fact that she was supposedly arguing for more coverage by the network of the horrors in Ukraine makes me very partial to her case, so they will have to prove me wrong. But, as is the case with reputational risk, winning me over will take a lot.

A Long Weekend Reprieve

5 August, 2022

Welcome to September already.

As my wife said, I am very good at telling everyone to take care of themselves, so I have to take my own advice. I have been on holidays for the last week and, as a result, while many topics for missives have come up, I will step aside and continue to take the time to relax.

I wish you and your family all the very best for the Labour Day long weekend. For me, and I suspect for many, we are conditioned that this is really the start of a new year.

So, I wish you all the very best as you step into this very time of flux. Whilst unsettling, it is also a time for opportunity, and I want you to have all the very best of opportunities wherever they may take you.

Take care, and take the time to consider your choices as we step into September.

Steadfast, Vigilant, Optimistic, and Adaptive.

The Nature of Public Service

12 August, 2022

First off, many thanks to all those who wished me a good vacation. It is true I can't write about leader self-care without practicing it.

This week I have had many topics to write about but, at the end, it became clear to me that there was one topic that stands out – it is all about the nature of public service.

The death of our Queen, Her Majesty Queen Elizabeth II, has shone a light on the true nature of public service, but also leadership. This evening as I write this, the accolades are pouring in about a public figure who had seen and done it all. But what stands out in her 70-year tenure is her character's story. While she was born into a circumstance, and one that was not expected of her, she rose to the occasion.

I never met the Queen; while I was at numerous events she attended, I know many who did know her. That said, I was also a keen observer of her. I believe this stoic stalwart enabled Britain, Canada, and our world to navigate tremendously tumultuous times. She has been a fixture in the lives of so many. We came to expect her presence.

Not just providing stability, she also provided leadership. I believe she represented all the elements of the Enlightened Leader. I did not model the framework on her but it fits. As I reflect on her service to her country, her realms, and the Commonwealth, it is rooted in the three elements of the Enlightened Leader:

- **Authentic Leadership** – As many have pointed out, she had a sense of humour, true identity, and, most importantly, knew her role and purpose in this world. Her Majesty knew how to set people at ease. I experienced this trait in her mother, but it is a trait that comes from a heightened self-awareness. She was inclusive and cared for all of the “little guys” of society. She understood herself and, throughout, was true to her beliefs. By the same token, when she needed to, she adjusted as she learnt along the way.
- **Servant Leadership** – Care for her people, society, and her world was paramount. Tied to her self-awareness was the strong sense of duty before all else. Her speech on her 21st birthday typified her sense of duty: “I declare before you all that my whole life, whether it be long or short,

shall be devoted to your service and the service of our great imperial family to which we all belong.”

- **Transformational Leadership** – Her Majesty fulfilled the transformational leadership tenet of inspiring life in others. She breathed life by word and action and, by doing this, she enabled others and nations to handle the toughest of times. She led by pointing a way and being resolute in thought and deed. Transformational leaders grow themselves and others to make things better all the time. Her speech during Covid exemplified transformational tenets where she invoked the enormous efforts and sacrifices of the Second World War. “We should take comfort that, while we may have more still to endure, better days will return. We will be with our friends again. We will be with our families again. We will meet again”.

She was someone that could do all these things and lead us through both good and tough times. We will not see her likes again in our lives. So, we must first mourn, but there will be a new way ahead coming out of this.

The reaction to Her Majesty's passing is being felt quite emotionally around the world. Much of that feeling stems from so many leaning on a constant for 70 years. With that pillar gone, there is a question mark as to what we can expect from the new monarch. While I believe that King Charles III will be a different kind of monarch, his commitment to causes for the environment and stewarding the earth, while perhaps seen as "out there" 30 years ago, merely shows he was ahead of his time. I have no crystal ball, but I feel that he will serve us well during his reign.

I hope this has given you a sense of, a. Her Majesty's leadership, and, b. confidence that the future will be good, but different as well.

God Save the Queen and Long Live the King.

Over all these months, I have closed with four words. Steadfast, Vigilant, Optimistic, and Adaptive best represent the example of Her Majesty and an example for us all to live by.

Succession and Changes in Leadership

19 August, 2022

Again, thanks to all those who responded to last week's missive. This week I will continue in the same vein, but from a perspective I think few have approached. This week is about **succession and changes in leadership**.

The last week's events got me thinking about how we respond when a leader moves on, and a new leader comes to take their place. We don't often see an initial smooth transition from a beloved leader to a new one. In fact it can be very disruptive for a long time.

Here are what I see are the series of causes:

- We have, through anaklesis, leaned on our relationship with the old leader and can't let go, so any replacement will not measure up
- The old leader is so beloved that any change, in any form, will be impossible to comprehend
- The new leader is unknown to us, but we will search out anything we can to reinforce the narrative that they can't live up to the old leader
- The new leader is known to us, and we become locked in past mistakes no matter what the individual has done subsequently
- Furthermore, I have found the succession issues exacerbated further by the post Covid era, where people are already up-rooted and unsettled, and any change is unacceptable. In a previous missive I likened it to people reliving the film Network – *"I am mad as hell and I'm not going to take it anymore."*

So, this brings us back to the issue of where we are now. The Queen is dead; the man who spent 73 years of his life being groomed for the role is now on the Throne. Like every other human, he has shown his fallibility. His years, like his mother's life, were spent in the service of the public. Regardless of the fact that he is there by virtue of birth, we must assume that, in all those years, he has had the opportunity to develop his skills, knowledge, and experience for the new role. As well, we must also assume (and there have been indications as the Queen stepped away from public life) that a handover occurred as well.

The King, like any other new leader taking over, will not only need to have the skills, knowledge, and experience, he will also have to have the cognitive capacity for the role. I believe he has demonstrated this. Regardless, new leaders need to be able to add value to those they lead. I would suggest that, just like we tell every leader who takes over a team, he will have to tell his story:

1. **Who he is** – what he stands for what he values.
2. **Why he is here** – his purpose in our VUCA (volatile, uncertain, complex and ambiguous) world.
3. **What he is trying to build** – his vision for the future.

Leadership needs to be empathetic to the impact of change on the workforce. You can't force people to accept new leadership; there will always be detractors to the new candidate. A period of transition and discomfort is likely to follow and leadership needs to navigate that compassionately.

So in closing, just as with every case of succession, while there should have been a proper handover, we must also give the new leader time. We need to mourn the loss of the old but open up to a brave new world and see what happens.

This is just another one of the many perspectives out there, but think about how the change of leadership impacts our daily life and perceptions, whether the Crown or in our work.

God Save the King.

Disconnection

26 August, 2022

In the early days of the pandemic, my business partner Tony Welsh coined the phrase “*during Covid not everything changed but everyone has*”. Looking back on the last several weeks, this is coming to fruition. When I speak with clients they voice the concern that they can’t understand the needs and desires of their people.

So, what is at the root of this disconnect? I believe it is rooted in the transformational nature of the pandemic which acted as an existential threat to the lives of millions. Covid disrupted lives and beliefs and it still hasn’t finished. The media daily reminds us that we still aren’t certain we are in the clear. Covid gave people time to think, experience, and evaluate their priorities, and showed them a different option for work. We can’t ignore the evolution that occurred during the pandemic and expect to revert to the pre-pandemic norms. We can’t expect that the worker who left in March 2020 is the same worker, with the same values and expectations, who returns now.

So, what does that mean for managerial leaders? We must first recognize that there has been this change in our people. What do you notice? Have their attitudes to work changed? Are they happily engaged in their work or have they become quiet quitters?

In [the book](#) I wrote of the golden rule of leadership – “*know your people and promote their welfare*”.

Now, more than ever, we need to know our people. We need to engage them more closely through three ways:

- **Empathy** – we need to use all our senses to identify and acknowledge how they feel. To do this properly you need to be present with them. The Zoom call won’t cut it; you need to be there with them.
- **Dialogue** – Communication has always been two-way. Now, more than ever, it needs to be about asking and not telling, listening and not speaking.
- **Un-scripting** – Much like how you need to be present in order to be empathetic, you will need unscripted time when you meet with your people. You need to set aside your task orientation and engage your people orientation. Have unstructured conversations just as you may have had before Covid over coffee or at the “water cooler”.

By employing these you will get an understanding of how your people think and what they need in this topsy-turvy world. But you will also have taken the necessary steps to retaining your people in the war for talent everyone is fighting right now.

People are looking for New perspectives right now; the old tried and true isn't good enough for them. So, its important for us to understand if their perspectives have changed. Have they joined the movement to incite change in your organization? Quiet quitting is a bit of a misnomer – it's anything but quiet in its impact and what it says about the tenor of your workplace. Employers absolutely should listen to what is being said (and not said) and what is being demonstrated to them.

A final point, though, before you start engaging your people. Ask yourself, how have *you* changed? What attitudes have changed for you? Listen to yourself first before you listen to others. It makes you a far more effective managerial leader.

Steadfast, Vigilant, Optimistic, and Adaptive.

Reconciliation

2 September, 2022

This week's missive falls on the same day as the National Day for Truth and Reconciliation in Canada. Last year, I wrote about the very first day that it was recognized.

A pause for thought as you consider this day, is this statement I have seen: *"Every single one of your Indigenous friends are either a residential school survivor, a survivor's child, a survivor's grandchild, or all three"*.

Let that sink in for a moment; the effects of actions are generational.

To be honest, a year later, I still don't have the answer to how we rectify this great wrong. However, as I tried to write something that had meaning for this year, I realized that my words last year resound as loudly this year as then. So, I have taken some of it here. I hope you take the time to look at it again.

Here we are on the National Day of Truth and Reconciliation. For our International friends, this is where we wipe off our Canadian smugness and admit that perhaps we are not as idyllic as we seem. We have chosen one day as our way to reconcile centuries of oppression. This is a day to recognise the days that we traditionally dragged Indigenous children from their homes and sent them to schools to be made non-Indigenous. This practice, while rooted in the mentality of a century before, continued until 1996. What occurred in those schools is the stuff of horrors, and the fact it ended only 25 years ago makes it that much worse.

When I, and colleagues, started the Ranger Foundation in 2015, I thought I was doing good by raising awareness of First Nations issues in Northern Ontario. It was to make Bay Street in Toronto aware of the work of the Rangers, who are 95% Indigenous, who protect and care for the communities and peoples of the North. The point was to show the challenges of the North and just how so many lives live by a thread, and it only scratches the surface. If you have ever been to the North, you know what I mean. This is not just a Northern issue. It is an issue of every street corner in Canada. It is in our very fabric.

Let's make this day every day. As a nation, we need justice, not symbols; potable water, not flags; we need to do better every day. We need to learn. It is not about virtue signalling and saving this for convenient moments on the calendar. It needs to be with us every day as we go forward.

Truth and Reconciliation is an opportunity to atone and an opportunity to learn that, in the face of this, our Indigenous People have shown us strength and determination.

To be clear, I have no right to say these things from the privileged platform on which I live. However, as you can see, this all has special meaning to me.

My challenge to you is to practice and encourage awareness and empathy. Recognition of the myriad lives, experiences, and nuances of your people and what they may be dealing with at any given time. What may be a moment of reflection for some, may be a deep rooted pain for others. It is not your job to solve it, or balm it, or fix it, but to support and bolster.

The weekend is upon you to reflect and contemplate the Indigenous message and what you may learn from it, for us and for our future.

Worker Shortage

9 September, 2022

Several potential missive topics this week came up in conversations with clients, but one I've selected here seemed to be prevalent and across the board – the shortage of workers is a multi-faceted issue and appears to impact many of our clients.

Roles are going unfilled because no one is interested in filling them, or there is no one qualified for them.

The first issue – that no one is interested – raises a number of possible causes:

1. Is there a shift in demographics?
2. Is there a shift in attitudes – people don't want to do this type of work?
3. Do these organizations/industries have a reputation that makes them unsavoury?
4. Is there a shift in beliefs? (People have changed because of Covid)
5. Is there a belief the work is above or below someone?
6. Is it that the work doesn't meet their needs? (The compensation for their efforts, or offered benefits, are not there)

It can always be a combination of a number of these factors that are leading to the trend – rarely is there ever only one cause for a problem, and too many times, we solve for one cause but miss the others.

The effort has gone into beefing up the actions of HR to attract people. At the same time, we often decry what is beyond our control, and our hands go up because "there is nothing we can do".

First, we have to ask what is within our **full control**, our sphere of **partial control** where we influence others, and then our sphere of **no control** where nothing can be done. For example, #3 above is all within our full control. It rests with our managers and the reputation of our business and industry. Whole industries out there put little to no effort into developing their leaders. As a result, they get a reputation of being not "a great place to work". Money is not just the answer here. (Notice it is only one cause in #6.)

So, ask yourself – what is within your control and what can you influence?

The second issue identified is that we cannot find a qualified candidate. This is fully within our control. We set the standards. As I often say to my clients, “new employees do not come fully formed”. It is the role of management to develop their people. We do our organizations no service in this war for talent by creating overly stringent enrolment standards. In my experience, these high standards are a risk mitigation mechanism as well as a way to keep managers from doing their job of building teams of increasingly capable direct reports. The work with new hires is about continuous improvement, not expecting perfection at the onset.

We will also have to see if the attitudes and beliefs change. Returning employees are changing their views, as we are already beginning to see. New or potential employees come with their own set of expectations. After all, it is still early days on the backend of the single biggest disruptor of the lives of this generation.

So, if you find yourself in this current war for talent, consider the causes well, and focus on what you have full or partial control over, and don't accept that there is no one out there; keep pressing on. I look forward to hearing if you have other insights I have not considered here.

I wish you and your family a very Happy Canadian Thanksgiving weekend.

The Power of Coming Together

16 September, 2022

This week's reflection is based on a series of client events over the past month that all have a common theme: the nature of coming back together. Over this month, I have witnessed teams who have come back together after months of online, telephone, or one-on-one meetings. That physically coming back together has been transformative.

Human beings need interpersonal relationships. Covid put those relationships in jeopardy. Post-Covid, with many still working from home or working hybrid, has made it hard for people to come together. Geographic separation exacerbates the situation because we never see each other.

I have seen teams, during the last two years, that have frayed to the point of breaking. In my experience, Zoom meetings have failed to instill people's trust. They are a mechanism to get work done; in most cases, they are driven by a specific agenda that leaves out relationships. They have forced people to rely on only two senses, sight and sound. Even sight is limited to a small portrait screen, so you don't get a full body language picture. This gets compounded by the fact that people turn cameras off, or, even more infuriatingly, are multi-tasking in meetings, reading emails and texts or dealing with whatever issue is at home or in the office. These distractions have contributed to a lack of understanding, empathy, and trust.

What I have witnessed over the last month is the power of coming together. Meeting everyone face-to-face has been transformative for teams. It has brought humanity back into the work. Participants have been genuinely appreciative to be back together. While there have been clear agendas, there has also been the opportunity for sidebars and, in some cases, dinners where they get together, and it is those times that are the most illustrative.

People value deconstructed time together to discuss the issues they face daily but never get the chance to discuss because of distance. They also need the opportunity to talk about the dynamics of the team and the things that bother them. This is the chance to resolve issues, to redress wrongs however they may have come about. These are the opportunities to regain trust and to relate to others.

So my advice to you this week is to consider this for the teams that you lead:

- Get them away.
- Give them a chance to talk about the things that bother them.
- Give them an opportunity to have deconstructed meetings.

I believe doing this will enhance trust, will enhance engagement, and will aid in retention. If you don't and assume your people will sort it out anyway, you will reap what you sow later. We spend enough of our lives at work and, as human beings, we need to have human relations during that time; otherwise, the "Tyranny of Do" will come back to haunt us.

So, have a great fall weekend, and ask yourself have I given my people the opportunity to be human again?

Steadfast, Vigilant, Optimistic, and Adaptive.

Employee Overload

23 September, 2022

Over 15 years of research at Forrest & Company, we have uncovered a trend in organizations, in all sectors, that the COVID era exacerbated – employees are feeling overloaded. Employees think they have too much work on their plates. If you doubt it, ask yourself if it got worse or better over time.

When you drill into it, the refrain from most groups is “everything is a priority”; nothing can be left off.

In discussing this with our clients, we point to one culprit – poor managerial leadership. Some would argue that employees are doing it to themselves, but we say that management is at the source of it. If employees are doing more because they feel personally obliged or responsible for doing it, then that is an issue where management is not stopping them.

At its core, the issue is not setting priorities or, when setting them, sticking to them. We find that organizations do not set priorities well. The centre of not setting priorities is our thinking.

Like the root of the word priority, prior is what comes first. When selecting what comes first, you need to ascertain importance because the important should come first. Often we lose sight of importance for urgency. What might be urgent may not be important, and what is important may not be urgent.

It is useful to recognize setting priorities is a form of decision-making. It is about choosing one thing and rejecting all others. It is fraught with risk, and that risk leads to fear. We have to overcome this fear. Not everything can be a priority and, with careful consideration of the risks, we can overcome the fear.

The Risk Framework we use with our clients is to think it through:

- What is the worst thing that can happen if I choose this priority over that?
- What is the likelihood it will happen?
- How severe will it be if it does?

By doing this, you are exercising your thinking, moving from what may be an emotional fear into the realm of that which we can explore rationally.

Regardless, you need to make sure you are clear that while there must be priorities; not everything is the first priority.

This is one key step in helping to ensure your people are not overloaded. Thinking before doing is the core of it all. After all, the role of management is not to let employees feel responsible for things that are not important.

Have a great fall weekend

Clarity and Courage

30 September, 2022

This week marked a milestone for a member of the Forrest team. Our associate, Tim Elliott, launched the third edition of his book *Clarity & Courage: Life as an Improvised Journey*. The book has been a mainstay of our coaching practice. We had a small gathering for friends, family, and clients in Toronto to celebrate the (re)launch.

I am writing about it this week because the book is an instruction for our lives. As I wrote in the foreword to this edition, Clarity and Courage is a simple yet profound expression of what we all need in our lives. We need the clarity of what we want and the courage to go after it.

I find, time and time again, I run across clients who are struggling with these two constructs. The typical career starts after our first few jobs, and we find those jobs that start to define us. If you wonder about this, look at the inordinate amount of time and energy spent defining our work titles. But the problem with this is that we often find ourselves captured by these roles, and our lives continue to move forward, but they aren't necessarily what we really want. Again, you see this in countless cases when someone loses their job for whatever reason, and they are lost. I believe it is because we don't take the time to get clear on what we truly want in our lives. Having clarity of the end state where we want to be is essential. As I have stolen for my book, Lily Tomlin said it well: "*I always wanted to be someone growing up; I only wish I had been more specific*". As children, we all have those dreams, but how many live up to the dreams of our childhood? Once out of childhood, we are told it isn't right to dream. So, we need to pause and consider and get that clarity.

But, it doesn't stop there; the other part is the courage to go after it. Courage, as Tim says, comes from the French "*Coeur*" or heart. We have to put our heart into it. We have to make it our goal and our determination. Life isn't a rehearsal; we need to live it. Too often, I have had that loss of courage that drives me to go after something important. As we teach in our coaching and flagship managerial leadership program, "The Leadership Path", we can't become boiling frogs.

The grisly analogy, if you don't know it, is that if you throw a frog into a boiling pot of water, it will immediately jump out. However, if you put a frog in a pot of water and gradually turn up the heat, the frog will stay and boil alive. Now, I am not suggesting anyone test this out. But the boiling frog analogy

is that we remain complacent far too long and don't dare to jump out of things that are not what we want or that are not good for us.

So, it is about having that clarity and that courage, but this is about the end state, not the plan because, as the second part of the book title suggests, we need to improvise on our journey. We need to adapt to changing circumstances in our planned trajectory. We need to adjust but always with that clarity of where we want to be and the courage to go after it.

The post Covid era is giving people food for thought. What we wanted before, and what we put up with before, no longer meet our needs and desires. There is a perfect window now as the world settles into a new rhythm, to get clarity and, once we have it, to steel ourselves to chase it.

So, now is a time to consider this. If you would like a copy of Tim's book, please feel free to contact us. It is a good read and has terrific worksheets as thought starters to help you on your journey.

Happy Hallowe'en.

Humanity 2.0

7 October, 2022

I wrote this week's missive in advance because I am currently in Rome attending a conference. The intent of this message is to explain the nature of the meeting and then, next week, I will report back on the deliberations of the forum.

The conference I am attending is the Humanity 2.0 Forum in the Vatican. This is the first time we have been back together since the pandemic. From its website: *Humanity 2.0 is a vehicle for facilitating collaborative ventures between the traditionally siloed public, private, and faith-based sectors. Its mission is to identify impediments to human flourishing and work collaboratively across sectors to remove them by sourcing and to scale bold and innovative solutions.*

Previous conferences have led to this year's Forum focus to identify how to ensure human flourishing in a tumultuous world. Specifically, it is to address these topics:

- **Help people everywhere in the world understand the looming threat of civilizational collapse and the root causes of this threat.** People need to realize that our global civilization is on the edge of collapse and why we will not inspire people to act.
- **Promote a vision of the future that can unite and inspire the world—a future where everyone has what they need to flourish.** If we don't have a common vision for the "brighter future", we will not get anywhere.
- **Chart a credible path for humanity to avoid civilizational collapse and realize this vision.** If we cannot align on a path to actualizing this vision, we will not know how to work effectively with each other.
- **Build a global movement of people, corporations, governments, and NGOs eager to walk this path together and address root impediments to human flourishing.** We need to build an effective movement to walk this path to do what is required to avoid civilizational collapse.

In the past, the Forum has seen a mix of business, not-for-profit, and religious perspectives worldwide. It has always been an eye-opening event which inspires and brings together some tremendous thinkers to help solve humanity's issues. The backdrop of the Vatican and the "eternal city" lends itself to some great discussions. But as you can see from above, there are important and lofty goals for humanity to live up to.

As you know, we at Forrest focus on how to help people to think better. By “thinking”, I mean helping people use their whole selves to make decisions and understand how our thinking colours our worldview.

We also speak of our role to help create “great places to work”, and the two are interrelated because it all comes down to how we think and see ourselves in the world. The common denominator is the human in the system; our world definitely needs a reboot. Our world is at a crossroads, and now is a time of action on many fronts. It may be daunting, but we need to act.

In previous Fora, we had no sense of what we currently see in the world right now. The agenda is impressive, and I will be able to write next week of the results of the discussions and deliberations.

I wish you a terrific fall weekend as we enter into November.

Steadfast, Vigilant, Optimistic, and Adaptive.

Human Flourishing

14 October, 2022

Many thanks to all those who responded to last week's missive. As promised, I will describe some of the results of the Humanity 2.0 conference last week.

The Church sponsored the conference as a place to bring thinking from various perspectives to one of the main challenges of humanity, which is how to accelerate human flourishing in our modern world.

It was held at the Academy of Science inside the Vatican. The venue has been home to notable thinkers such as Albert Einstein, Stephen Hawking, back to its first leader Galileo Galilei. Our conference included academics, businesses, governance, and clerics from around the world.

Our task was to define human flourishing, develop a framework for it, and then discuss how business and philanthropy could help bring it about.

- I am still processing all that I learnt, but I have come away with some insights that you may find useful. So, in no particular order, here are some thoughts:
- Human flourishing transcends our narrow definition of “well-being”. Many organizations focus on well-being initiatives, but human flourishing goes beyond programs and is very much individualistic. It goes beyond happiness, and is about thriving.
- As a result, it goes to what I call the Golden Rule of Leadership: “*Know your people and promote their welfare*”. It is about endeavouring to do the best for others, and it relies on a human connectedness.
- It is an ideal that is worth humanity striving for. As I presented in my address to the group, it can only be considered while also considering the environment we humans live in.
- It is about leadership but, just as leadership requires management, it has to have both elements to it. Its domains include:
 - Happiness and being life centred
 - Physical and mental health
 - Meaning and purpose
 - Character and virtue
 - Close social relationships

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- While it is about looking at the individual, it requires us to look at community and the greater good. We are neither robots nor animalistic. For people to flourish, they need to reach their highest desired potential, and it is about removing the impediments to that goal.

There are many other elements but, to keep this digestible, consider these thoughts:

- Do our organizations really endeavour to help our people flourish?
- Do we consider that, when our employees give us their time and efforts in our capitalist business model, we are doing all we could for them?
- Do we truly, to quote Kipling, “*walk with Kings nor lose the common touch*”?
- Do our leaders really care for others?
- Have we lost our connection because of Covid or now on this side of it in hybrid workplaces?
- Do we lift up those who are struggling to survive, let alone flourish?
- Are we creating sustainable entities, or is it the quick flip?
- Do we know whether our people are languishing (at the opposite end of flourishing) and can we spend the time to find out?

The two days enlightened me and took my thinking to places I had never considered. When I wrote my [book](#), I struggled with some of these constructs but hadn't gone far enough. There will be detractors saying “*we can't do it*”, “*it is too big*”, but I submit that we have to start somewhere. I was surprised and encouraged to learn of large corporations that have created an executive role of Chief Flourishing Officer to help their people and society thrive.

Any organization starting down this path will have a sustainable competitive advantage. Those that travel down this path will better retain their talent, and as is the mission of Forrest & Company, create great places to work that deliver the strategy.

If you would like to know more, please feel free to reach out to me. There is so much more to be done and much more to this than I can cover in this short missive.

Steadfast, Vigilant, Optimistic, and Adaptive.

Sanctuary Trauma

21 October, 2022

The news these days is bleak. Consider these issues:

- Inflation is high
- Interest rates are going up
- The cost of living is up
- Covid, flu, and RSV are on the rise
- Corruption
- Mask or no mask debate
- War in Ukraine has the potential to spill over
- Sabre rattling in the Pacific
- Climate change continues unabated
- Flourishing fringe politics
- Religious fundamentalism is growing
- The rich get richer, the poor get poorer
- Labour unrest in a variety of sectors
- Human trafficking continues
- Biodiversity slumps
- And the list goes on...

Undoubtedly, the media and social media are to blame for our awareness and its prevalence – the constant barrage of negativity is inescapable. We are all walking around with this burden, so how do we cope? The issues are real, so what to do about them? As I asked the last two weeks, how can humanity flourish in the face of these things?

It is about leadership and care for others. It is about a genuine concern. Engaging with our people is even more important for those in managerial leadership positions. While the list above is not exhaustive, it still doesn't include the closer daily issues of family, friends, and other detractors so now, more than ever, we need empathy.

In [my book](#) and previous missives, I wrote about sanctuary trauma. This phenomenon was identified in First Responders who face trauma daily. The concept behind sanctuary trauma is that their suffering is

compounded when they go to the workplace; they can't escape the stressors. Over 50% of first responders see this as impactful and distressing as a real trauma. Work is not supposed to make our day-to-day lives more difficult or stressful.

What compounds sanctuary trauma in the workplace:

- Being unclear on our work and expectations
- Not being recognized for our efforts
- Having to negotiate with our co-workers
- The fear of damaging relations with our co-workers
- Disinterest by our leaders in our circumstances
- Cold business practices that don't account for human beings
- Antiquated and not well-thought-out policies
- Time wasted in the workplace in useless meetings
- Overloading of work and a lack of prioritization

This list is not exhaustive either but reflects what we hear from our clients. These issues sap our energy and impact our resilience. Do any of these resonate with you?

So, how can people flourish in this environment? They can only flourish when management does its job and removes these impediments. Now, more than ever, we need professional managerial leaders.

If you are worried about what will happen in 2023, we need to realize that it will require good managerial leaders who care for their people. All businesses have one thing in common: human beings run them and, in the face of all the challenges, we need to help our people be resilient. We all need a helping hand, and those in leadership roles have the task of providing that hand.

This will be the key to getting through the months to come; good leadership on all fronts.

So, ask yourself, where are you on stopping sanctuary trauma? Where are your leaders on doing the same? If we work at it, we can help employees flourish and create great places to work that deliver the organization's strategy at the same time.

Steadfast, Vigilant, Optimistic, and Adaptive.

The Difficulty of Managerial Leadership

28 October, 2022

Last week, I wrote about sanctuary trauma and the implication that we are making the lives of our employees worse if we don't take managerial leadership seriously.

This week, I had the opportunity to be a guest on several podcasts due to [my book](#). It should be no surprise that the discussion was about managerial leadership and why we are not better at it.

My argument is that it is rooted in how our careers develop. As we start off, we have a set of technical expertise that becomes our career's foundation. Whether we start as sales reps, information technology experts, or finance experts, this remains our foundation. Our first step forward is to be a manager of technical experts. Our role now is to ensure execution in that realm of technical expertise. This is the last point in our career that technical know-how is important. The next level is about managing those managers to enable them to make sure the execution occurs.

So, several things happen as we move up:

- We feel the tug of our technical skills and, if we don't shed it, we can get too caught up in the specialized pieces.
- We fail to delegate and, in many cases, prefer to hang onto vestiges of our past success as technocrats.
- We can, over time, micro-manage those underneath either because they are doing it differently than we would or because we believe we are adding value by showing them how.
- We stop managing the work (which is an important phrase) i.e. we don't prioritize the work below us.
- We don't engage with our people and truly lead them by growing and developing them .
- We stop ensuring that our managerial leaders are good at their managerial leadership work instead, we measure them on their technical work output.

As you can see, this becomes a vicious cycle. In the end, we wonder why our organizations aren't successful, we have no successors across the organization, and everyone is exhausted.

The point is that we need to examine the managerial leadership of our organizations. What is the strength of our leadership bench?

1. Do we have the right leaders in the right roles who manage and lead?
2. Do our leaders address the tension well between delivering the tasks and having a positive impact on others?
3. Are we working well laterally in the organization without silos?
4. Are our employees fully engaged?

I have raised many issues and offered only a short insight here. The real answer is for us to be professional managerial leaders, learning and growing our businesses. We must jettison our technocratic expertise, the skills we entered work with. We need to stretch ourselves and our leaders to bring about growth in our true profession at middle management and above.

This is a journey that requires discipline and stick-to-it-iveness. But the spoils on the trip will be truly earned and essential for long-term success.

To our American clients and friends, we hope your Thanksgiving was good and an opportunity for respite for the journey ahead.

Have a great weekend and all the very best for the push to the new year.

Steadfast, Vigilant, Optimistic, and Adaptive.

Unsung Heroes

4 November, 2022

This week is a marked departure from what I normally write about. It was sparked by a story of a US Navy SEAL who was deployed but needed to come home when his boy was diagnosed with autism. The line that caught my eye was that his wife had been through a lot; “she was a Tough Navy Wife”. It got me thinking about the unsung heroes of our success; those that support us.

I have lived that life while I led two worlds, one serving the country while simultaneously working a job that took me away. Lo and behold, family was the third on that list, and my wife had to carry the burden of working and raising four kids almost alone while working herself.

So, this week is about the unsung heroes of our lives; those that support us. We often don't reflect on all those that have our back or as we say “our 6”. Often, we plow on with the work, not realizing those that enable our life to give our best.

That said, we also have to recognize that it is not about child rearing or family management but those that support us to our core and enable us to get up and get going every day. I often ask leaders who they talk to about the day's events and who gives them perspective. Inevitably I get the response – my significant other.

That said, I often warn those who take work home in this way. At the same time, we cannot escape, including a significant other, because they are friends or confidants. We have to balance it. Working from home has made this even more of a challenge because we have successfully blurred what used to be a clear schism between home and work.

In this exchange, we have saddled them with a situation beyond their control. We have locked them into that moment, and if they care for us, they will remember whatever the issue may be. We have isolated them in a chamber where we roam about freely, and as circumstances change, we can wander about and resolve issues, but they get stuck in that moment. So, I warn clients to be very careful; it is unfair to those that support us to burden them with our thinking for the moment.

Mental well-being practices tell us that we have to seek connection with others. I am not suggesting one not, but for us to be mindful that we have not to burden those that support us with something beyond their control.

This brings me to the final point about support, which is through the lens of us as Managerial Leaders. What of the individual who may not have that supporting mechanism?

Consider, for example, the single parent who balances family and life and works for us. It brings me back to another ongoing theme – the golden rule of leadership “*know your people and promote their welfare*”. We need to know our employees’ circumstances. We need to know their challenges. As leaders, we must step in and provide support with empathy and understanding. As Servant Leaders, we need to be able to provide support yet balance being fair and equitable to all.

So, as the weekend approaches, consider the nature of the support you get and how in turn, you support others. We all need help. If you have been blessed with great support mechanisms, as I have, ponder over them and acknowledge them. If you don’t, then how can you get that support? Think as well about your people and truly promote their welfare by being their support.

Tuesday was Giving Tuesday, so this weekend consider those that give to you and how you give to others.

Steadfast, Vigilant, Optimistic, and Adaptive.

Lack of Role Clarity

11 November, 2022

Do you find yourself in too many meetings? Too many meetings that you don't know why you are there, or that result in nothing? Or do you sense frustration and burnout in your employees and yourself? Do you feel like you have too much work and not enough time to do it? Finally, are things not moving forward and is there contention between employees?

Welcome to the new work age – the old age of work on steroids.

Time and again, these are key pain points that we find afflicting our clients. There tends to be a “get'er done” attitude that, if we push harder, we will get through but – I hate to burst that bubble – it can't be pushed through; it needs to be solved.

This week, I argue that these pain points are all symptoms of a lack of role clarity. There may be a variety of additional causes, but the common denominator is the lack of clarity of expectation for us and, in turn, the lack of clarity of what others are to do.

By lack of role clarity, I mean these things:

1. We are not fully clear on the expectations that are upon us for our work
 - a. We are unsure of what is the endstate for our technical work
 - b. We are unclear of the expectation of us as employees
 - c. There is no definition of the expectations of us as managers
2. We are unsure of who has the authority to make decisions
 - a. We lack the context for the decisions
 - b. We lack the skills for decision making
 - c. We are unsure of priorities
 - d. We believe we all have the right to the decision
3. We are uncertain of the guidelines for our work – specifically, the authority we and others have
 - a. We aren't sure of the authority to get service
 - b. Others don't believe or understand our need for service
 - c. We don't have clarity on who can comment on the output of our work
 - d. We don't know for certain if we can comment on others' outputs

e. Who actually can call a meeting?

Role clarity is the work of management and sometimes we are too busy to take the time to confirm or we see people busily at work and assume they are crystal clear on what they Should Be working on. The truth is they are not.

COVID made this phenomenon worse. In many cases, people felt they should be hard at work, working long hours and being busy; but the question remains whether it was valuable work or work for work's sake. We had to rely on people's sense of responsibility; their personal feeling of obligation to do the work. The challenge with that was, in many cases, the same old work they had always done, which may or may not have been valuable. When people work solely from a sense of responsibility, they work on what they know and have experienced. As a result, they miss opportunities for continuous improvement, especially when circumstances change.

So, it is the role of management to provide clarity by defining what people are accountable for and how they need to work laterally across the organization. Only then can we expect them to work with that subjective sense of obligation.

Role clarity is the work of defining accountability and authority and, in so doing, making sure your organization is efficiently using its people, effectively achieving the goals and all the while building trust amongst co-workers.

Next week I will explain the process for Role Clarity; it is the key to organizational success and a fully engaged workforce.

Have a great weekend, the last gasp of Fall.

Steadfast, Vigilant, Optimistic, and Adaptive.

Bringing about Role Clarity

18 November, 2022

Last week, I began describing the importance of role clarity for employees, and this week is about how to bring about role clarity.

Role clarity starts with clarity of Strategy. Words have meaning, and I am being very specific. By Strategy, I mean an understanding of an endstate, a vision, a mission, a set of values, lucidity of the nature of the business you are in, and what makes you unique to your customers. It is about long-range objectives and a general essence of how you might get there. The structure of work needs to come from the Strategy and not the other way around. It is important for sustainability that form follows function.

The key to role clarity is that endstate. Endstate is a term coined by the military to denote a successful disposition at the end of efforts. It is important because it is from this endstate that people can then plan how to get there. It defines the ends and empowers others to define the ways and means to get there. I chose the word empower because it is key to the engagement of individuals in the work of the organization.

Role clarity is about defining what someone is accountable to deliver and allowing them to use their judgement and discretion to ascertain how to do it. Role clarity defines that endstate for others and is, by its nature, different from a job description. A job description is a tool by which human resources can source someone for a role based on a set of activities and define compensation standards for a role.

Role clarity is the tool of management to define the expectations for the role, and from that expectation, you find the right individual to fit that role. The expectation becomes the standard by which they measured against; how well they used their judgement and discretion in fulfilling the expectation for the role. In this way you explore how effective they are in the role.

Role clarity begins with you, the manager. It would help if you had clarity of what you are accountable for and then what you will delegate to them to assist you in completing your endstates. Specifically, role clarity requires:

- Setting the context for the work

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- Clarifying how the work relates to the Strategy
 - Establishing the priorities
 - What is the endstate of the accountabilities someone has
 - What authority the role has over others
 - What authority other roles have over this role
 - What resources the incumbent has to assist them in fulfilling their accountabilities

Role clarity is a process to provide this clarity over an entire organization. While it can look onerous, it is some of the most important work a manager can do. Our clients who follow our process find this is the most engaging work that employees engage in. By its nature, it will change the face of the organization. It defines;

- The talent required for roles
- It re-defines existing processes
- It re-defines performance management
- It re-defines talent management
- It establishes succession plans
- It can determine the nature of how supporting functions like technology support the talent not the other way around

In the end, role clarity transforms your organization to a humanistic organization where the human beings that do the work are the key to organizational success. It is hard work but important work that ensures you get the results you are looking for and need.

Steadfast, Vigilant, Optimistic, and Adaptive.

Christmas Eve Care

25 November, 2022

Here we are, the third missive of the month, just before the December holiday season. It is hard to believe that so much time has passed since the world shut down on 13 March 2020. This week's will be short because I sense that many are already off for the holidays, and those not are in the frantic scramble to clear the decks before the onslaught of a New Year.

So, the simple message here is about leader self-care. Take the time to relax and reconnect with your family and friends. Contrary to what the media wants us to believe, we don't know what is on the horizon, so we need to practice force protection.

Force protection and renewal enable us to have the strength to face future challenges head-on just as we did in March 2020, and now is the time to rest and recuperate. The rest is essential, and engaging with others gives us more resilience.

I wish you, and your loved ones, all the best in the season that begins with the winter solstice. Yes, it is the beginning of winter, but also the start of longer days, signifying that more sunshine, spring, and new growth are around the corner.

Have a terrific holiday and rejuvenate yourself.

Steadfast, Vigilant, Optimistic, and Adaptive.

Welcome to 2023!

2 December, 2022

Welcome to 2023! I avoided sending out a missive last week, figuring many would be away from the office and not wanting to add to your headache of a post-vacation inbox.

Every new year at Forrest & Company, we encourage our clients to reflect on what the outgoing year meant and project forward on what the New Year should or could be. As I did my own thinking on this, I was struck that 2020, 2021, and 2022 were years of Survival. Right up to December 2022, the media was warning of impending doom from COVID resurgence, RSV growth and flu, so it, too, ended as a year of Survival.

For those who followed my exploits in Rome at the Vatican in November, you will remember I was there for the International Conference on Human Flourishing. To me, this focus was timely – 2023 really needs to be the year of flourishing – we are moving beyond Survival to Flourish.

Flourishing denotes, as in plant life, growth. It goes beyond illness and wellness to growing. It is beyond the popular resiliency which was de-rigueur in the height of Covid. Flourishing denotes a form of self-actualization but, at its core, flourishing is different for every one of us. What may be flourishing for me may not be the same for someone in much different circumstance.

So, my question for you as you step into 2023 is what does Flourishing look like for you? Consider:

- What do you need to feel that you are growing?
- What do you want to feel fulfilled?
- What connections are missing with others?
- What opportunities will you strive for in 2023?
- What will be your goals for 2023 that will enable you to flourish?

These results describe what you are striving for and your intent for 2023. This becomes your *raison d'être* for 2023; which is why you are here. Why you are here is driving you to a purpose.

By setting your sights on what flourishing means for you, you will establish your purpose. In previous messages and in [my book](#), I describe the need for a leader to have a story – who am I, why I am here,

and what I am trying to build. By examining what it will take for you to flourish, you are describing why you are here. It is a critical point of clarity for you and an important message for others.

A final note on managerial leadership – as I have said, the golden rule of leadership is “*know your people and promote their welfare*”. So why not take the time in 2023 to truly understand what your people need in order to flourish and support them in achieving it.

To do this work, you will need to commit the time to think, so my wish for you in 2023 is to take the time to determine what flourishing will mean to you before you step into understanding what others' needs and wants are.

Steadfast, Vigilant, Optimistic, and Adaptive

2022 Reflection

9 December, 2022

So, have you taken the time to reflect on what 2022 was about? What did you learn? What relationships were created, and which were reinvigorated?

As I mentioned last week, 2022 (and by extension 2020 and 2021) were years of survival. I still believe that the focus of 2023 needs to be on the transition from survival to that of flourishing. We have learned new lessons, had new experiences, and faced down new challenges that we can now bring to bear.

What is 2023 about? How does it fit into your life's purpose? What are your projected goals and milestones on your journey for the year? What will it take for you to flourish this year?

As you can tell, I am picking up where I left off last week. Judging from the responses, the idea of “flourishing” resonates with many. A New Year is a good time for us to take stock of ourselves and what we need and want, but it is also an opportunity to do it for others.

Starting close to home, consider what your family members need to flourish in 2023 and beyond. What is important to them? What goals do they have? As a parent, I think I know the answer for my children, but I need to check my assumptions. Just because we have been there ourselves doesn't mean we have the answer for them. On the other end, we may wish to consider what our parents need to grow and develop. Unlike our children, they **HAVE** been there before us, but it is still worth it to ask ourselves how we can help our parents and other family elders as their needs evolve.

I am not suggesting here that you need to solve things for them, but you need to do the mind work and think it through. You need to ask the questions that will confirm your suppositions and you need to do it with empathy. You will need to listen hard, avoid prejudice, and recognize that they are different than you with different information and perspectives. Resist the temptation to impose your beliefs onto them and their choices.

What of your friends? How can you help in their flourishing? Of course, this is the realm of responsibility – a personal feeling of obligation – and each of us will, of course, have differing levels of a feeling to help them prosper. My premise is that the beginning of the year is a time to take stock and assess

which friends might need some help to grow. The choice is always yours to determine whether and how you might help but, again, it is about taking the time to reflect and make that assessment.

Finally, the last group are those that you are not just responsible to help flourish, but you are accountable to help. As a managerial leaders (as I say in [the book](#)), we are accountable to our manager – be that an individual, a board, or an owner – to build a team of increasingly capable direct reports. Within that increasing capability are the seeds of flourishing. It means to grow them beyond where they are now. But it doesn't just stop there. As I have said many times before, the golden rule of leadership is to know your people and promote their welfare.

Promoting their welfare is embedded in servant leadership. Servant leadership is not just ethically and philosophically important, it is pragmatic. The ethical covenant of servant leadership says that in exchange for employees doing your bidding, you are obliged to help and care for them. Nurture them and give them the resources they need to be successful. The pragmatism comes from the fact they will be more engaged and less likely to quit and leave thirty years later, or to quit and join your competition.

Next week I will go deeper on the role of the managerial leader in flourishing. This week, I suggest you take stock of your people and determine who needs the help to thrive. Reflection time now will help you navigate later.

I assure you; you will find this reflection period time well spent and it will help you to flourish as well.

Assisting Others to Grow

16 December, 2022

If you have been following my threads, you will know that the emphasis so far this year is on flourishing.

Last week was about personal flourishing and how to help those close to us prosper. This week is about the managerial leader's role in assisting others to grow.

I have [written extensively](#) on the need for a new age in leadership, the age of Enlightened Leadership. The tenets of Enlightened Leadership are authentic, servant and transformational leadership.

Authentic leadership is about leaders being true to themselves. Interestingly this relates to flourishing because leaders need to be true to themselves in order to grow and improve. In a sense, this is a form of the concept of flourishing. We need to flourish inside ourselves if we are to help others to do the same.

The core of enabling others to flourish is for leaders to be **servant** leaders. We need a mindset that we are here for others and to make their situations the best possible for them. We live in an age of selfishness; our world has splintered. The new age of enlightenment needs leaders who care for others and are concerned for their welfare. We are servants to help others to flourish.

Finally, **transformational** leaders are about creating change. Like all living creatures, without growth, we stagnate and die. To die in the work sense is to give up and merely get through the day. Our leaders need to help us to grow and transform. We need to help enable the chrysalis to become the butterfly – that is our leadership role.

So, to help our people flourish, we need to know what is in their interest; we need to go beyond superficial data to the needs and wants of our people. To do this, we must:

- Listen and respond with empathy. We need to acknowledge that these details involve feelings, and we need to recognize what they are
- Challenge them to be all they can be and enable them to reach their goals. We do this by:
 - Helping to make them aware of where they are currently in relation to their goals.

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- Helping them to make choices by assisting them to see the alternate paths to get to where they want to be.
 - Helping them to be confident in themselves to make the decisions they need to in their life.

Those that know me will recognise these steps as the foundations to coaching. Coaching is helping others to determine where they want to be, and where they are now, and assisting them in a path to getting to that ideal state.

Coaching can be defined as $\text{performance} = \text{potential} - \text{interference}$, to use Tim Galway's equation. In helping people to flourish, we need to help identify that potential and help them remove the things that are getting in the way of the desired self.

So, as you consider all those things you need to do as a managerial leader, you may be seeing this as an additional effort and time consumer, but consider the cost if you are not helping your people to flourish. This is an important arrow in your quiver for those struggling in the war for talent. Enlightened Leadership builds engagement, loyalty and greater capability. Can you afford not to engage in helping your people to prosper and grow?

I wish you a great weekend to consider flourishing for you, those that are close to you, and your people.

Authentic Leadership and Flourishing

23 December, 2022

Last week I laid the framework for leading flourishing organizations and positioned that it was about exercising Enlightened Leadership. Enlightened Leadership is about rethinking how we lead in the face of so much that has happened and is likely still to happen to humanity.

Enlightened Leadership is about practicing Authentic, Servant, and Transformational Leadership. If you are to flourish, and your people are to flourish, you need to practice these three leadership traits. This week I will focus on **Authentic** Leadership.

Authentic Leadership is about being true to yourself. In my experience, many people walk through life in someone else's skin. Some believe they should be like great leaders in history: the Napoleons, the Welchs, the Buffets, or even Musks. Some are inadvertently living out their parents' dreams for them, and others are just going through the motions. This is what I mean by living in someone else's skin – they are not being true to themselves. They are unaware of what they truly want and need, and are not living by their ethics and morals.

Being Authentic is being true to one's self and having a heightened sense of self-awareness. Self-awareness is crucial to being authentic and enabling yourself to flourish. It isn't just being aware of your weaknesses as we are often apt to gloat on, but it is being aware of, and honest about, your strengths. It is about leveraging those strengths to grow and overcome those weaknesses.

Authenticity requires clarity of purpose – *why are we here?* I have a habit of going back to the root word because I find there is a great deal of learning in doing so, and I also find that while we often use the same word, it may not mean the same thing to each other. Purpose is from the Latin *propositium* or “intention”. So, clarity of purpose is what you intend for your life. Only with this clarity can you flourish or help others grow.

To help others to prosper, you need to be centred, and you need to do these things:

- Be yourself and have a heightened sense of self-awareness
- Understand your strengths and limitations and seek to better yourself
- Understand your goals and objectives in life

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- Have integrity or be whole with yourself
 - Be open with others and willing to hear opposing views
 - Be real, be who you are, not who you think you should be

Authentic Leadership is the first step to flourishing for yourself and a precursor to helping others to flourish. So, take the time to ask:

- How well do I know myself?
- How well am I in touch with my ethics, beliefs, and desires?
- How confident in myself am I?, and,
- How secure am I around others?

Authenticity is about being genuine and stripping yourself of façade. This can be very uncomfortable for people as it can make them think they have to be vulnerable, which requires a lot of trust and courage, especially at work. But being authentic isn't about exposing yourself raw to people, it's about consistency – having a set of guiding principles and staying true to them regardless of challenges.

Unsurprisingly, this requires a great degree of courage and commitment. Paradoxically, it can be tempting to curate our “authentic selves” for presentation to our teams. Beware the façade as your people will see through it and it will erode trust.

Take the time this weekend to reflect on flourishing. All the best to you and your family.

Steadfast, Vigilant, Adaptive, and Optimistic.

Servant Leaders and Flourishing

30 December, 2022

Last week I asked you to reflect on flourishing through the lens of the first of the leadership tenets of Enlightened Leadership – Authentic Leadership.

So, did you or the hurly-burly of day-to-day life get in the way? Reflection is an essential skill of the Enlightened Leader. One of the reasons our clients send participants on our year-long high-potential managerial leadership development program is to get them to reflect on being authentic, and getting away and giving them focused time at [The Leadership Path](#) is one of the few ways to do it.

Today is about reflecting on another tenet of Enlightened Leadership that enables you and your people to flourish – **Servant** Leadership. Servant Leadership is an oft-talked about but little-understood and exercised leadership practice, and it is essential to human flourishing. It is about caring for others, namely your people. It is grounded in the golden rule of leadership “*know your people and promote their welfare*”. It is all about enabling our people to prosper.

So, how does enabling your *people* to flourish help *you* flourish? Doing things for others has been proven to be not just intrinsically good, it has been proven to be beneficial for those doing it. It reduces stress and links you to higher callings or vocations.

From my perspective, to be a Servant Leader you need to practice these things:

- Seek and accept responsibility – lead by example
- Ensure people understand your intent
- Be an impediment remover for your people
- Encourage others' thinking and input, and most importantly,
- Know your people

Deep down inside though, you need to have humility. By humility I mean modesty and underplaying your importance – of course, you are important, but your people are the important ones. They are the ones to make you look good. To demonstrate that humility, you must have authenticity or be authentic. So Authentic Leadership is linked to Servant Leadership because, if you are filled with hubris, you will

not be helping others. Hubris is the anathema to Servant Leadership; it works against it and, as I argue in [my book](#), I believe it is rooted in three things:

- The desire to maintain a façade and keep people away
- The misbegotten belief in being perfect, and
- A lack of confidence

One of the key takeaways from [The Leadership Path](#) is the need to be a Servant leader. Participants walk away with a true sense as to why they are in their roles and respect for their relationship with others. They learn the covenant of trust that comes from mutual respect and care for others. This covenant is the foundation of Servant Leadership and is the key ingredient to flourishing.

This weekend's reflection is about you as a Servant Leader, so ask yourself:

- What is the covenant of trust and mutual respect between my people and me?
- How well do I really know them and how well do they really know me?
- How well do I relate to others with humility and authenticity?
- Is there anything I would do differently?

I wish you another weekend of reflection and flourishing. All the very best to you and your family.

Steadfast, Vigilant, Adaptive, and Optimistic.