



2020

Managing the Maelstrom

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Welfare

13 March, 2020

Never have I seen a world like this. Even when we went through 1987, 9/11 or 2008 it was nowhere near where we are today.

I know what it is like at the top. It is lonely. All eyes are upon you, so here are some thoughts, at the end of this unusual week, for you to consider:

1. Self Care – you are burning a lot of energy to deal with this world right now. You will do no one any good if you become a victim of the virus, so take the time to take care of yourself; eat, sleep and exercise.
2. Be Seen – either in person (unless you are practicing social distancing), on email, or video teleconferencing. People need to see someone at the rudder, steering through the storm.
3. Maintain Your Mantra – remind yourself with a mantra – “keep calm, carry on” “this too shall pass” etc. – when emotion gets the better of you. It will help create the calm within the storm.
4. Remember the ABC – In times of change “always be caring” about others and “always be communicating” with others; it helps them immensely.

I sent these, not because I didn't think you would overlook them, but sometimes we need a reminder when there are multiple priorities and tensions are high. On a final point, the golden rule of leadership is “know your people and promote their welfare”. Now you need to focus on both your welfare and their welfare.

Communication

20 March, 2020

It is the end of another tumultuous week. I hope this finds you and your family safe.

I decided that I would continue to send you notes as we all try to Manage the Maelstrom.

Last week I suggested “Always Be Communicating with Others” in these challenging times. Having reflected on a week of leading from a social distance I realised that communication will be critical to you and your leaders’ success and that it is time to focus on some key concepts. At the top of the house it is critical for you to drive the communications that will be cascaded down to every employee. Here are some thoughts:

1. Beware of Your Communications – Be succinct and clear with your intentionality; for example, make sure you are distinct if you are expressing an opinion, statement or suggestion. They will alight on what you say and scramble away to work on things. Furthermore, remember that you wear the mask of command; all eyes are upon you and you need to balance the tension of authenticity with leading others. You can't always express what you are thinking. You are under stress from all fronts.
2. Structure Your Communications – You need to standardize your meetings so they are predictable and succinct. This is known as “Battle Rhythm” in the Army. Meetings are your window to establish your intent and laterally integrate everyone before they go away and begin working in their basement silo. Reduce the temptation for one-off meetings; it is critical to keep everyone on the same page with a common operating picture.
3. Be Aware of their Communications – If you thought there were a lot of emails and meetings before; they just got worse. Many people will be using technology to make up for being at distance and they will use it to prove their value from a distance. Clarify how and what communications are necessary. Reinforce them that you trust them to be working; they don't have to prove it. Para #2 will help you here.

I use Bill Jensen’s model of communication–this is all people need:

- Know – what exactly do they need to know?
- Feel – how do you want them to feel after the communication?
- Do – what exactly do you want them to do?

Finally, pay attention to when you and they are communicating. Working from home people need to take breaks otherwise they just keep working. This is especially important when your people are trying to impress you with how hard they are working.

The same goes for you; recharge yourself in these stressful times. Build fences around your work time; lead by example.

Hopefully I have not added too much to your deluge of communication.

Mental Health

27 March, 2020

Here is this week's instalment that by no means answers all the questions but builds on what I sent you previously. If you are like me, these few weeks have been an emotional roller coaster and my big concern is mental health. Here are my thoughts for you to consider:

1. Now is the time for Intelligence. This is not a commentary on national leaders but rather a reflection on the need for Intelligence, not just information. The 24/7 news cycle of COVID-19 is not helping. We need to be vigilant for hoaxes and misinformation as well as poorly researched data. Beware of the sources and make sure that your people are listening to the right sources. If you haven't yet, consider pushing Intelligence to your people.
2. Intelligence feeds emotion. The panic that we see around us is based on the information steadily coming at us. Like me, you have probably gasped at the growing rates of COVID cases. All of us are on the same news cycles and, as a result, an emotional roller coaster. That requires us to burn energy and, in turn, can lead to burnout and dis-ease, and that is when we are weakened to fight off illness. Watch for your emotions and the emotions of others. Right now we all need empathy.
3. Control is at the Core. The human need to be in control is driving both our issues of angst and potentially the behaviours you see in others. So much of our world has changed overnight, that we have a feeling of having nothing to lean on anymore. The deluge of data and bleakness merely reinforces it. The real need to get the world back into control comes in varying ways. Its manifestation will not likely be logic but rather emotion. So find ways for you to be in control and give your people that freedom as well.

As I may have told you, I am the Vice-Chair of Wounded Warriors Canada, a national charity that focuses on mental health for veterans, first responders and their families. I firmly believe that what we are going through right now will lead to far more cases of mental injury than the physical injury of the COVID-19 Virus. Beware of this for yourself, your family members and your people. It is one of the things you can begin to control. You can do that by always be caring and always be communicating.

The Close and Deep Battles

3 April, 2020

The battle has been raging for most of us for several weeks now. All of us have been fighting the close battle. We had to deal with the effects of the virus initially and, as a result, we went to social distancing, which led us to whole new ways of working. This was swiftly followed by the huge economic impact with the ongoing shudders. This week, I have been struck by the need for our leaders to be working at their proper levels. Here are some things to consider:

1. The Close Battle - The close battle has been characterized by the initial set up of our businesses, while protecting our forces from the virus and its impact on our businesses. In conversations with clients, routines are set and Battle Rhythms are in place. An aspect of the close battle to turn our attention to right now is work system protection. The protection to consider is the cyber threat to your workforce who are working from home, un-protected by the systems you had in the office and vulnerable to outside threat. As I mentioned several weeks ago, they, and we, need to be vigilant.
2. Your Role - Your leaders, by now, should be fully immersed in fighting the close battle. Leave them to their work at their own levels. Take the time to listen, communicate, and care but empower them through clarity of expectation and provision and acknowledgement of the authority to work at their levels. Your job is to coordinate and remove the silos between them. Now, more than ever, they need clarity of accountability and authority because we need you, the leader, for the Deep Battle.
3. The Deep Battle - The Deep Battle is the future; it is where real long-term success resides. COVID 19 has been a forcing function. It has forced us to work differently, and that, in turn, will require us to be structured differently. Everyone is struggling with structure right now. We at Forrest have always said Structure comes from Strategy. The Deep Battle requires you to start predicting and projecting to create long-term success. Now you need to (re)define what you will be down the road and then structure accordingly. This is your work in the Deep Battle. A good staff can help you, the Commander, with this. To help you I suggest standing up a “tiger team” of experts who are not fully engaged in the Close Battle to help you with your long-range planning. Get your biggest thinkers to help. It is hard to be sure, but you have to make an educated guess and carefully measure the risk. We Canadians are not good at risk; we want surety. Now is the time when you have to predict as best you can. This is your real work, and for what you get paid.

Again, I am sure you have already been thinking this way and considering these areas. It struck me that we are now getting to an inflection point where thinking longer term, structuring the work, and settling everyone into their work is essential. I hope you can also see how the previous missives have led us to this point.

Wishing you all the very best in your Close Battles, Your Role and Your Deep Battle, and hoping you, your family and all those you care about are safe and secure.

Close and Deep Battles #2

10 April, 2020

In talking to people, they have been expressing how much harder they are now working. I believe that is a function of them being both on their own and somewhat still discombobulated. I hope that is not the case for you and that you can rest and recoup this weekend. My emails have been intended to help you stay focussed and to reduce the churn; I hope they have had the desired effect.

Last week I wrote about the Close and Deep Battles, and I thought it might be worthwhile to reinforce the concepts. A new approach to work is emerging, and it requires change - in perspective and in habits.

The Close Battle is the tactical battle; it is characterized by the focus on people, processes, and resources. The first emails were to orient you to fighting this Close Battle, with the orientation around “Force Protection” and you being present and seen as the firm hand on the tiller. I still believe that intelligence and presence is the key to being successful, where communication and connection with others are critical to maintaining morale in the Close Battle. But that now needs to be left to your lieutenants -- they need to take up the fight of the Close Battle to free you up to look deeper. Your battle rhythm will keep you informed as to what is happening in the Close Battle and what decisions you really need to make.

The Deep Battle is the strategic and operational level that focuses on looking further out. The leader that is looking further out to the horizon will ensure the survival of their business in the long run; it has always been thus. It is now more heightened as we get ourselves sucked into the Close Battle. We need to fight against that pull and stay afloat in the Deep Battle, the realm of strategy, which then leads to the “Operational Art,” which will be led by your direct reports. It is about reflecting on the changes affecting you:

- International, National, Provincial and community
- Industry
- Market
- Customer
- Competitors

Consider Strategy – what do you want to be in the new world order? Given the impacts of the external world, you need to review your strategy or your desired end state (vision, mission/purpose, values, strategic drivers, USP, etc.).

1. Does it need to change? If so, to what?
2. What does your structure need to be to achieve this new strategy

If your strategy doesn't need to change, then your structure ("who does what") likely needs to change, given your new work paradigm.

The mark of a great commander is the ability to not get mired in the details, but to step up and survey the whole battlefield to see it in the abstract and then, when needed, step back into the tangible Close Battle. Again, this is your work to determine strategy, and structure to meet the new paradigm.

In the end, as the Queen said, this is a time to "slow down, pause, and reflect". I hope this is an opportunity for you to do that as well.

Challenging Your Thinking

17 April, 2020

All the talk these days is about business resumption. It seems to me that while it is desirable, it is a reflection of human nature. We all want to get back to normal. Indeed, we have all started to show resilience in the crisis. There is still much to be learned.

We have put heavy emphasis on resilience, but I argue adaptability is crucial. The only way to adapt is to challenge our status quo.

We do this by challenging our thinking.

We at Forrest, see that Challenging Your Thinking is a critical managerial leadership skillset.

Here are some ways I would suggest you need to Challenge Your Thinking by asking yourself these questions;

Close Battle

1. Your Profile – In the parlance of Effective Intelligence, people are living out their thinking profiles. They are either caught up in Being Judgemental, in Analysis Paralysis or engaging in Endless Inventiveness. In your decisions:
 - a. Are you relying too much on cold Logic or your impassioned Values?
 - b. Are you endlessly searching for Data and Information or worrying about how it will Impact Others?
 - c. Are you coming up with way too many Ideas or ones that are wholly impractical right now?
2. Your People – I get the sense that we have a handle on what our direct reports are doing, but we aren't sure what is happening further down.
 - o How well are our leaders leading further down, and where are the emergent leaders that we never expected?
 - o Are they providing guidance and direction or are they waiting for the next direction from the CEO's video teleconference?

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- Are they setting a steady cadence of work, are people scrambling, or are they leaving it up to their employees to be busy in busy work?

Deep Battle

1. Doing what we have been doing – We are finding that we are in a rush to get back to normal and that we are not questioning the work we are doing.
 - Given the world has changed so much, why should you be in business now?
 - Is what we do today really needed for tomorrow?
 - How well are we engaging our customers and stakeholders more closely?
2. Structure – You will never have quite the same “hall pass” to change the things that have been in place since you inherited your role. This is an opportunity to remove the clutter and lean out your organization.
 - How can you reduce the number of levels?
 - How can you redefine the work and functions?
 - How can you ensure that there is lateral integration across the business rather than silos?

It is the best of times; it is the worst of times.

By Challenging Your Thinking, you are questioning the status quo and adapting to the new paradigms. You have an unprecedented opportunity to hit reset and fix the things that would have taken far too long and required far too much effort before.

The motto of The SAS (Special Air Services, not Scandinavian Air Systems) is most appropriate now; “Who Dares Wins.” Now is the time for the courage to dare.

Battle Rhythm

24 April, 2020

It's week seven, and getting back to "normal" is really on the minds of everyone. I believe this will be an accordion-like "Stand To" getting back to that normal; it will take a step forward and then one back. (Maybe two steps forward and one back to give the feeling of gradual progress?)

Regardless, it will require planning. That planning will have to be rapid and not plodding. Your Battle Rhythm drives planning. A few weeks ago, I introduced the idea of Battle Rhythm but now realize I didn't go into enough detail.

Battle Rhythm will, ideally, give you the critical intelligence made up of insight and information to run your business.

Here are three aspects of Business Battle Rhythm:

1. Battle Rhythm is about Planning. Planning starts at the top. Battle Rhythm is about how you pass direction down to the levels below to allow them to react, plan, and direct action as quickly as possible. Specifically, it is where you bring your team together to get their input into your decisions. Then you decide, and the clock starts. They then have their meeting with their teams to get their input and then make their decisions and issue their direction. Then, the next level does the same all the way down so that the front-line can get to action as quickly as possible. Given that it must be touched during the cascade all the way down by management you need to build in time for this to happen. This way, the front-line aren't running to catch up or going in half-cocked. To do the planning it requires:
 - a. Forethought – what might happen?
 - b. Insight – what is happening?
 - c. Hindsight – what happened?
2. Battle Rhythm is about Control. I hear continually, from all levels of our clients, how many meetings they are in now, and how many of those meetings don't add value. Time is being wasted, and people's efforts are being wasted. People forget that when you ask someone to attend your meeting, you are asking them to stop doing their work and start doing yours. Battle Rhythm controls the meetings to organize and direct the energies of the organization. In the age of a distributed workforce, we have people trying desperately to stay in touch and people feeling

guilty that they are working from home. This needs to be balanced to the need to get things done and to enable people to react and think

3. Battle Rhythm is about Structure. How long should it take from you deciding what needs to be done to when it is actioned at the front-line? Battle Rhythm streamlines this so that you can adapt more quickly. Poor structure means that it will take longer. For those that have taken to fighting both the Close and Deep Battle, a good rhythm and cadence will enable you to do both. Good Battle Rhythm allows you to adapt. It is about going from idea to implementation quickly.

My final point is using Battle Rhythm to dedicate time to learning. Go back over what worked, and what didn't, and why. This will make you more nimble the next time. I have not gone into a lot of detail here but if you would like more please feel free to reach out. I should point out that I believe a lot of organizations should have had Battle Rhythm before any of this COVID activity occurred. Meeting management and communications is a perennial problem. Like I said last week though, now is the time to clean up all those things that you inherited.

I hope that you and your family remain safe.

Self Evaluation

1 May, 2020

So, here we are at week eight by my counting; I am not sure about you, but I am getting tired. The drive to get back to normal is overwhelming. The lack of real intelligence (as distinct from information) from the media is not helping.

As I said last week, I believe there will be an accordion effect. Re-opening things, in whatever form or order, will be much harder than it was to shut them down nine weeks ago. It is going to require a lot more of your energy in the weeks ahead. You need to "go to ground" and protect yourself for the long haul and the fight ahead. There is a lull in the battle right now, so you need to use it. With all this in mind, my questions for you this week are for you;

1. How are you, really? How do you feel physically and mentally? You have burnt a lot of energy to get here. You have had no vacation, perhaps blurring home and work (as one of our team calls it Work/Life Blend, not Balance). So, what are you doing to recharge your coping mechanisms? What are you doing to take care of yourself? Finally, what thoughts and feelings are, and how are they, impacting you?
2. How is everyone around you? You have been relying on them through this so far; how far can you rely on them to help in the coming challenges? How well can they answer the questions above for themselves? Who can you truly rely on to help you going forward? What are the relations above you that need to be enhanced? Who are your stakeholders? What bridges need to be built with your stakeholders to get you across into the new realm so that you are not fighting a rearguard action in the new normal?
3. Who can you talk to? As I have said before, it is lonely at the top. Command is a solitary endeavour, and you are in command. (People recoil from this term, but it is real.) Stakeholders and employees, as well as their families, are relying on you. Who can you confide in? Who can give you intelligence as to what is really happening? Who can help you step back from the fray? While working from home, I do not advocate sharing with partners or spouses; it puts them, and you, in an awkward situation. So who is in, or can be, in your circle of confidence?

In the army, in command roles, I always had a Sergeant-Major. The Sergeant-Major's role was to remind me I was mortal, to be brutally honest, and to keep an eye to ensure that I was taking steps to be resilient. They always knew that if I weren't getting rest, eating well, and above all, exercising my

body, I wouldn't be thinking straight. If I didn't think straight, things could go wrong with dire effects on people's lives. So, who is helping you and calling you out? Also worth considering who is doing this for your team as well? This was why we established our Private Executive Counsel business to provide just that advice to get you off the treadmill.

The word is that we are not going back to normal, but moving to a new normal. It requires us to adapt. I hope that these questions have given you pause for thought. Success in the coming weeks will be us on our game to handle the vagaries of a much more uncertain world than that of a few months ago. No chance to withdraw; only drive forward into new terrain.

Wishing you and your family, again, a safe and happy weekend.

After Action Review

8 May, 2020

Well it's not over yet. It looks like it will be with us for a while. As I have said before going back into the new normal will be harder than it was to shut down. In executive coaching we often state that the only way you will get out of the current loop is by figuring out what you should have learned. While it won't be quite that easy, the question this week is what have you learned? Learning organizations are able to shift easily from resilience to adaptability. Learning organizations learn from their mistakes and their successes. In order to learn you need a system. The After Action Review is a process formalised throughout NATO allies. The premise is that we all learn as we go. We have used it quite successfully for many clients to enable them to assess three things:

1. What was the plan?
2. What actually happened?
3. What do we need to do differently next time?

We endeavour to conduct them with everyone present who is key to the event. It is not meant to find who is at fault but to enable us to learn. Very rarely is there one cause for failure or success.

So what do you need to understand

I am writing this at the end of the 75th anniversary of the Victory in Europe. Like you in other times I would be doing very different things right now, but I have found that this time now gives one an opportunity to pause and reflect. I have known many of the "greatest generation" and all of them were humble individuals who did what they saw as their duty. The fact that almost a tenth of the Canadian population at the time served is a testament to duty. Even those on the home front served as the entire nation was singularly focussed on defeating evil. It was a scary time, I remember my father recalling the fear that swept Canada after the fall of France and Hitler's short-lived peace pact with the Soviet Union. Britain and the Commonwealth were on their own, there were no signs of America entering the war.

Throughout the 6 years of war Canadians stepped up and served around the world. The battles of Hong Kong and Dieppe are seared in our history where Canadian losses were huge. The battle of the Atlantic which was acknowledged last week lasted the entire war and one can only imagine the tenacity it took to sail back out to sea knowing the threat from the unseen was looming everywhere. In the air as

well knowing that you might not be coming back from your bombing run must have taken huge feats of emotional strength. We of course know so much more now about the huge emotional cost as people came to grips with PTSD. All of these trials though would have been worth it to be the liberators of Italy, France and Holland. It is amazing to see that the people of those areas have never forgotten what Canadians have done for them and they instill it in their children to this day.

So as I reflect on that time I am drawn to consider what it means for us now. In talking to the soldiers who are working now to care for the vulnerable in the care homes it is interesting to hear them refer to “getting into the fight”. Those who are not in the frontlines refer to themselves as “left out of battle” or LOB. They are all itching to do their part. Of course none except the medical services have been trained to care for the infirm but they are adapting. We on the outside must adapt too. We must stiffen our backs to get the nation and nations back up and going. There is an ever present threat to our health and well being and that is the closest that I can come to compare to those who served in the War. We are inconvenienced by physical distancing measures but it isn’t like leaving family and friends and not seeing them for 6 years.

So I would just suggest that if you can pause and think of what those have done before. I think that if you do that you will like me see that there is a light at the end of the tunnel. It will steal you with resolve that if they can do it we can too. They have pointed the way by their efforts and sacrifice and have passed us the torch. We have been lucky for what the previous generation did for us. They ensured that we would not have to sacrifice ourselves and they made sure that there would not be the same war as they had served in.

I wish you and your family and your organization the very best in the fight ahead. Please stay safe and reflect well.

Change

15 May, 2020

So...the stampede is on—well, not in Calgary, but the stampede to get back at the way we were is definitely running. Human nature is about getting back to the old (comfortable) ways but, the world has changed. As the weeks have gone on, we at Forrest have been examining what has changed and what will change. We are doing this so that we can help our clients as they think through the next steps. Change has occurred and we need to be planning for the future, as people push to get back to what was, which no longer exists.

In our assessment to date, there are 6 business or corporate areas that we project have changed dramatically:

1. Strategy – I wrote to you earlier about this. Whether it is strategy as an end state or strategy as a plan; it has likely changed. So what do you do now?
2. Workforce – Realise now, that no one is coming back the same. They have all changed and been changed by this. What will you do about it?
3. Systems – Your processes, procedures and policies will have had to change over the last 10 weeks. So, what has to stay changed or needs to change yet again?
4. Risks – Your risk register has changed. There are now whole new challenges that were just a glimmer mere months ago. What is your risk appetite about these new risks? Future risk?
5. Finance – I believe that, in all likelihood, your financial situation has changed in some form or another. Back to work doesn't mean back to immediate revenue or cash flow. So what do you do about it?
6. IT – Your technology has changed and therefore how you work. So what do you keep and what do go back to?

There is one of these which stands out to Forrest; it is the one to which we feel people are not paying enough attention.

We believe that leaders are not fully realising the changes that have occurred to their workforce. Some of your workforce has been furloughed and some continue to still work for you in small groups, at the office or alone at home. What do they think about their lives and their work? Your employees have had to learn new skills. They have been stressed and challenged riding an emotional roller coaster. What

they value will have changed. Their relationships with their peers, co-workers, and family members have all changed. What do you know about these changes? Do you care about these changes? If you do care; do your leaders care? Finally, do your leaders even truly value leading?

So, I am going to give you some homework to get into the headspace of understanding how we have changed. Over this long weekend (whatever that means) reflect on how you have changed:

- What do you value now?
- What is important; what is not important?
- What have you learned?
- What does your work mean to you now that you have so far weathered the pandemic?

How you answer these questions may key you into how your workforce might do the same.

I said a while back that this is an opportune, and even necessary, time for reflection. So, take the time to get to know the new you. As my business partner Tony Welsh put it: “not everything has changed but everyone has”.

Wishing you and your family a terrific weekend.

Capability

22 May, 2020

Last week was a discussion of the changes that have occurred, and will occur, as a result of COVID. I gave you homework but didn't hear back (not that I really expected to).

The homework was to consider how COVID has changed you. What do you value now, what motivates you, and, more importantly, how do you see the world as a result of what has transpired?

I asked that to prepare you to consider this week the impact on those in your team and, by extension, your Direct-Reports-once-Removed (DRoRs).

As I have said earlier, this is an unprecedented time. You won't get the opportunity to examine your strategy and your team quite like this again. That examination needs to include your DRoRs as well. Now is the chance to assess who is coming back and how they are coming back. You need to look at the capability of your team going forward because if you aren't there yet, you are about to hit the ground running, and there can be no looking back. Over the years, you have heard me define human capability as made up for four things:

1. Attitude and Motivation – this is the one that may have changed inside people over the last few weeks. Do your people truly value the work they are doing? Have they found new outlets for their energy and passion? They may have lived to work before, but now will they work to live? How truly engaged are they now, and what experiences have they had over this time that have changed their views? For this, you must dig. The adage that when you ask someone how they are doing and say "fine," you better check further.
2. The Ability to Behave Reasonably – In the past, you would have heard me refer to this as the absence of a negative temperament. So in the face of COVID, how have people behaved? You may not have visibility of this but be prepared for it. Are their nerves frayed to the point where they are touched off easily? Has the 5 PM Chardonnay gone further in an attempt to cope? Remember the category of individuals who deliver excellent results but leave a trail of bodies behind them.
3. Skills Knowledge and Experience – This is the most common attribute of capability. It is either what we are born with or develop through experience, coaching, or training. Interestingly enough, no one, unless you were in the public health realm, had the skills and knowledge for

COVID. So, as things transpired 11 weeks ago, everyone was flying blind. There is a lesson here that you shouldn't put all your emphasis on Skills and Knowledge because, if you do, you will have people who are brilliant day-to-day and, if not, they will not be able to work through new changes. So how people made do in COVID (or not) was because of # 4.

4. Cognitive Capacity – This is the secret sauce which, when the individual has this and the other three, they can take off. It is the ability to handle the complexity of the role they are in. Can they think through the work? Can they find ways to solve issues? As the secret sauce, it is also the governor on their capability. If they don't have it, they will ultimately be unsuccessful. In the case of COVID, we had to rely on people's cognitive capacity to develop solutions and not just their skills and knowledge. So, do your people have the cognitive capacity for their roles or are you developing workarounds?

So why am I raising this now? Now is the opportunity for you to assess and make decisions going forward. Do you have the right capability underneath you to propel your team forward?

You will need a team of people who have all four of these running well when you get back to a semblance of the way things were or begin establishing your new norms. You have probably seen behaviours over the last months; this will give you a framework to assess them.

Good luck, this isn't easy, but it will help you come out the other side in fighting shape for a hectic Summer and Fall, and beyond.

Mental Health

29 May, 2020

It seems like we take a few steps forward just as we take one or two back. Like I mentioned several weeks ago, this feels like an accordion as businesses, Provinces, States, and Countries move to try to get back to a new normal.

This week I have been struck by the number of discussions about mental health. In my work with Wounded Warriors, it comes up when discussing the need for mental health support for veterans, first responders and their families with some corporations. One, in particular, said the programs that we offer in the veteran and first responder space are exactly what their financial institution business needs.

That got me wondering how pervasive the issue is. In a number of these weekly missives, I have suggested the topic of mental health, but it was always in light of your general health.

Many people think that mental health as an issue in the military started with Afghanistan. It goes a long way back, while misunderstood as shell shock in the First World War, the signs have been there. It became the current issue during the 1990s, as Canadians were involved in more and more belligerent peacekeeping operations. The reason that it came to prominence was that the peacekeepers could not control their environment. They had to watch the horrors with no way to control it.

I raise this because I believe there is a similarity between the age of COVID and the need for control. COVID and its impact have challenged people's sense of control. We are not in control. Further down in organizations, people have even less control over what is happening to them. We made them all go home; then, we made them work from home, then we asked them to keep at the same pace as before. They did this with the prospects of their and their loved ones' health at risk. All the while, their livelihoods being at risk.

Then you layer on the aspects of perhaps being alone in a condominium, or surrounded by children who are clamouring for attention makes it all that much harder. As an example, someone pointed out this week; the pandemic has exposed the inequity between men and women at work. The woman is still expected to mother while doing their work from home.

Finally, the social beings that we are have taken a hit thanks to physical distancing. As a result, we have lost that very human connection. It is not surprising that there will have been periods of outright panic due to these stressors.

Then what about the work that is going on? I raised this several weeks ago. People are working because they think they should. In some cases, they are working, feeling guilty, unsure, or feeling the need to be part of all that is going on. Do you know what the work is going on further down? Are your people just caught in Zoom Hell going from meetings to meetings? Interestingly, the hardest person to reach right now in many organizations is the CHRO.

So, if an individual contributor is feeling these things, what of the leaders? How is their confidence? Do they know what they are supposed to be doing? Are they making it up as they go along?

Finally, consider your own EA, how are they? How do they feel about their work? Do they have work to do? Are they furloughed? Have you taken their work and sense of self from them? It is all intertwined.

Realize people are trying to make this as business as usual, but it isn't. A lot of the old paradigms don't work anymore.

When people say they are "fine," challenge it. Empathize and recognise the feelings under the language and the looks. Recognize that their physical health is being tested, their financial health is in doubt, and their sense of self is suffering.

So what to do about it? I suggest going back to the very first "missive" I sent you. It's all about the ABC's – always be communicating and always be caring.

Now is when the Authentic Leader is needed, express how you are feeling, and the challenges you have personally faced. Be real and human, lead by example. The others will follow.

New Age of Enlightenment

5 June, 2020

It seems every week I write to you about how the world has changed, but this week I think we are reaching our apex. As these weeks have gone on, I firmly believe that the effects of COVID will be lasting well after a vaccine is available to us all. Many people talk about what an incredible year 2020 has become. Whether it is the impact on an individual's mental health or our inability to come together in the groups, it has had a profound effect on individuals, their beliefs and sense of self.

The economic impact on individuals is massive as well. Whether it is the fired, the furloughed or the failed business, it has and will have a considerable effect. The vapourized assets from the changes in the markets or even the turbulence as markets bounce around will add to economic woes. In turn, these financial woes and health woes are adding more powder to the fire of injustice.

This week has seen the powder keg explode not just in the US, but now around the world in various forms. The horrific domestic images we are seeing are hopefully making us all realise we are not so different, and we are all one. We have reached the common denominator. As I said on twitter this week: "in these days we are all black and indigenous, and we cannot allow these injustices to go by with impunity."

I believe that 2020 is a new day for humanity; it is a time for us to transform this planet. It is not about getting back to December 2019. It is about moving forward and taking the time to change what should be changed on every front. 2020 has taught us a new respect for the individual. That respect came when you saved lives by sending them home, and when you set up the health and safety measures as they came back. For a time, we have set aside profit for humanity. I always say you cannot get out of your current circumstance until you learn what you need to learn about it. I believe that this new respect for humanity is that learning.

So what do we do with this learning? Well, we lead. As leaders, now is our time to shine. We say that leaders need to exhibit these three traits:

- Be Authentic – have a heightened sense of self-awareness and be real to your core
- Be Servant – care for those who work for you and remove the interferences to their potential

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- Be Transformational – continuously improve and transform your team and organization. Transformation is what is needed now; leaders that transform their environment.

These three traits come together to create the Enlightened Leader who leads through a Story – Who I am, Why I am here, and What I am trying to build. Telling this Story is what we need to do as leaders. But it does not stop there. Just as I have said in past emails, we need to do the management work of Strategy, Structure and Systems. When all these come together, you and your organization will shine.

Now, this looks simple, right? There is one crucial ingredient I have left out. It is discipline. It is the discipline to stick to it and never waver. The addition of discipline is critical. It is easy to declare and it's easy to say "Do The Right Thing" until it becomes difficult, or until it becomes expensive and unpopular.

With the discipline to stick to our learnings, we can create the New Age of Enlightenment.

We are in a New Age of Enlightenment, and it is high time for all of us to transform our world for the better.

Risk

12 June, 2020

In the upheaval of the last few weeks, we have seen an orientation to ethical behaviour that has been the catalyst and growth of discussion about risk. The corporate statements in support of the protests were from an ethical standpoint but also in response to risk. The risk was the risk to the reputation of the business.

Risk has been the common denominator throughout this pandemic. As I mentioned in the early days of COVID, the risk was to our employees' health and safety. Now the risks seem to be getting more bountiful.

Risk is always with us. It is a risk that hangs over us like a shadow in every decision we make. The core issue of Risk is the ability to predict the future. It is the ability to determine how far out on a limb one can go. It is about the nature of surety—the less inclined to assess risk and assess surety the more "risky." So risk is all about assessment and evaluative judgment.

In some cases, it relies on data, and it relies on a feeling. In all cases, it requires us to judge or form an opinion. In that assessment, though, we have to be able to determine what is the acceptability of risk. We have to have criteria against which to assess our risks. For example, based on data and a prediction, we sent people home because our criteria were that no one should lose their lives because they came to work. So, staying in an office was an unacceptable risk. In other cases, though, that level of probability became an acceptable risk to fulfill our work. So again, it comes to the acceptability of the risks.

In our experience, though, people are not good at risk assessment. Instead of predicting what it is the likelihood and the severity of something, they merely rely on their emotion. When emotion is involved is when risk becomes fear. One of the great disservices in our society is that our educational institutions don't teach thinking; they teach regurgitation. It is the work of organizations to train their people "how" to make decisions and think through risk. The problem is that even organizations don't provide their people with how to deal with risks. It is no surprise then that the #2 issue in our survey of organizational pain is the lack of decision making in corporations, which is rooted in people having no frameworks for their choices.

So what will be risky going forward? Based on what we have been gathering, here is an in-exhaustive list of risks. See where you stand? Which are you dealing with, and which might you have overlooked? Are there any that are even bigger than these?

Performance

1. Loss Of Productivity
2. Supply Chain Challenges
3. Market Volatility
4. Business Viability
5. Customer/Shareholder Disenchantment

Process

1. Loss Of Internal Controls
2. Cyber Threat
3. Disconnection Of Workforce
4. Lack Of Compliance

People

1. Loss Of Essential Talent
2. Retention Of Undesirable Talent
3. Disengaged/Disenchanted Workforce
4. Corruption/Unethical Behaviour

Again the list is by no means exhaustive. When we started this pandemic, and now, the risk to health and safety is number one. But, all in the list roll up into the meta risk for all organizations: reputational risk. Conversely, these can occur because of damage to your reputation. The days ahead will continue to be full of danger, so it will be essential to assess your risk appetite.

I wish you and your family the very best in these ongoing tumultuous times.

Junior Leadership

19 June, 2020

Over these weeks, I have sent you a variety of different thoughts covering multiple areas for you to consider as you manage in the maelstrom. All of them have been geared to you personally and your senior role in your organization. Topics have ranged from last week's Risk, to Mental Health and to Organizational Structure. This week I am writing based on what we are seeing as an area for growing concern – the role of the junior leader in your organization.

Here are where the concerns lie: in our experience, junior leaders are the ones who have the least attachment to leadership traits. They have come up through organizations and then, suddenly, find themselves thrust into leadership roles where they may have little interest and may not truly value the task. What I believe has exacerbated this situation is that, with the advent of COVID, they have found themselves all alone. We also see that the gap in leadership is usually at the mid-level, where the mid-level leaders don't know how to lead leaders.

In talking with various CEO's, they have done a great job of connecting and holding their businesses together in these days by engaging with employees in zoom rooms or team sessions. The unintended consequence of this great work is that we may have left no role for our junior leaders. Of course, now if we all charge out and engage them, there is a further unintended consequence by taking the engagement of these critical players away from mid-management.

So here is a series of suggestions for you:

- Make Junior Leadership a topic with your senior team. At your next appropriate meeting, talk about how you need to support this level and make sure they are ok.
- Take the time now for leadership development. Leadership development can be your fireside chat, or that of mid-management, or it can be training, but take the time to engage them in their development, don't just do it lip service.
- Hold your leaders accountable. Demand to see what they propose to do to develop their leaders. It is their work.

Junior leaders are critical to your success because they are at the coal face. They are in the mix of the

execution, and they drive your success. Coming out of this, you need them prepared and inspired, ready to charge forward. You don't want them sitting at home wondering what to do next.

Stay safe

Taking a Rest

26 June, 2020

It is the Friday before a week of potential holidays and the real beginning of summer.

Now is an excellent time to talk about the nature of rest. In the last few weeks, as I have mentioned before, we are seeing more and more employees in organizations feeling overwhelmed, burnt out and generally stressed. This is not surprising; we have been through lots these weeks and uncertainty is around every corner.

In previous posts, I have mentioned the need to take care of yourself, and this is a good time to reiterate it. You, as the leader, cannot afford to go down as a stress casualty and so, with the prospect of long weekends and summer, it is a good time to reflect on your stress levels and what you are doing to deal with them. Too many negative stressors lead to distress as we burn energy to deal with them.

Many people are blissfully unaware of the symptoms of distress. They find themselves in three areas, with some examples:

1. Physical – muscle pain, rashes, headaches .
2. Behavioural – workaholism, overeating, excessive drinking
3. Emotional – fidgeting/uneasiness, anxiety, depression

Most don't realize that, apparently, over 70% of physical illness is a result of stress because burning that energy makes us unwell. Have you ever gone on that much-needed vacation only to end up with a cold? Illness like this is a symptom of distress.

So, it comes down to how do you deal with these symptoms? The best method, I believe, is to examine both our coping and our thinking mechanisms.

Coping Mechanisms:

- Getting the proper balance of true rest: either sleep, mindless activities, or even the chance to sit and think/meditate.
- Connecting with others, whether in Covid or not. We need to connect to other humans.
- Taking action on things rather than letting the lists build-up.

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- Basic self-hygiene like eating correctly, and working out.
 - Managing your time so that you aren't rushing from meetings to meetings.

Thinking Mechanisms

- Build your self-esteem by not letting it be torn down.
- Re-describe the negative into the positive; see the glass as half-full.
- Be compassionate to others, recognize where they are and sincerely wish to help.
- Express what you genuinely think; don't bottle it up.
- Feel your connection to the broader humanity and care for the world.

So, with the prospect of holidays, take the time now. Logic would dictate that you have spent a lot of energy to get here, but the marathon is not over. Every day we hear either from clients or the media of the fears of wave 2. You need to be in your best shape possible to fight that next fight.

Take time with family and friends and recharge and above all else, stay safe.

Ethics

3 July, 2020

I hope you heeded my advice last week and in some cases, you may still be replenishing yourself today.

So what is happening in a week where the North American continent is caught up in holiday thoughts when holidays continue to be very surreal concepts?

My answer is, I am not sure, but I believe there is a lot of room for reflection. So this week's perspective is on a topic that I think doesn't get enough focus or thought. It is the realm of ethics in business.

I read an interesting article this week that argued that in the COVID and post-COVID age compliance would give way to the pre-eminence of ethics. We see businesses boycotting the likes of Facebook ostensibly for ethical reasons. Is this putting ethics first, or is it acting before compliance issues arise? Compliance is being ignored with impunity starting with politicians down through society. For business, the nature of the new workplace has made compliance very hard to enforce. Instead, we need to rely on ethical behaviour.

So how do you get ethical behaviour? I think it starts with defining what actions are moral. That, however, is not going far enough as we have witnessed in the news the last five weeks. Just setting what is acceptable is not adequate because people will choose to ignore the guidelines. It is the application of accountability that changes the environment. It is the act of holding someone accountable to the set standard that creates a difference.

Establishing the standards is critical work. Many people believe we shouldn't have to do so. They believe there should be common standards, but like common sense, common standards are not so common. It is part of our diversity as human beings that we do not all have pre-set standards. There is always the hope that there are some high-level ethics to which we can all agree. For example, the "respect for the dignity of all persons" seems like a universal ethical standard but trust me I have seen way too many abuses of this with no consequences. I think it is essential to realise what gets in the way of people being ethical. Here are some potential causes for ethical lapses:

- Different expectations

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- Opportunities to break free
 - Confusing standards
 - Competing priorities
 - External pressures
 - Differing values

The list can go on. So why discuss this now? As I see it, you are in a tumultuous cross-road; the old standards don't apply. The COVID age is having an impact, and we must scrutinize the nature of our ethics. I believe this is an age where we need to define the standards and then hold people to the standards. As a sidebar, isn't it ironic that the reason we have compliance legislation in the first place is because we weren't holding people accountable to ethical standards?

So this week, ask yourself:

- What do we truly stand for?
- What standards have changed?
- What have I discussed about ethics in this new age?
- What is the clarity of expectation required?
- What will be the impact on compliance?
- How will I drive this down through my leadership?

The first question is about clarity for what you stand. Definition of what is important to you is the first step to the Authentic Leader that I spoke of several weeks ago.

Have a great weekend but spend the time on reflection. All the very best to you and your family and of course, stay safe.

Open and Honest Dialogue

10 July, 2020

So I thought a different tack for this week's managing the maelstrom. Today's message comes from a few weeks of working with Executive teams in this new world order of COVID. Watching teams interact brought me to the conclusion that one of the victims of COVID is open and honest dialogue.

For years, I have said that open and honest dialogue is the Holy Grail of business; everyone wants it, but no one can find it. I think COVID has now exacerbated this. I am not sure whether it is economic uncertainty, technology as a platform, discomfort of communicating at a physical distance, or all three of these that are the causes.

I was intrigued when a group of academics and authors spoke out about the freedom of expression this week, which may be part of the issue as well. People are on tenterhooks. They are concerned to offend, or to misstep. We know only too well that the fear of damaging relationships is a powerfully destructive force in organizations. It leads to dysfunction between Managers and their Direct reports and vice versa.

Ask yourself this:

1. Is this an issue for you?
2. Are you getting Best Advice from your people?
3. Are they genuinely expressing their opinions?
4. If you answered yes to any of these, how do you know?
5. What insights and perspectives are being left off the "cutting room floor" in the interest not to offend?
6. If you're paying people for their thinking, do you hear their thoughts?
7. Are they sharing, AND are you truly listening? Because if you aren't doing the latter, you certainly won't get the former.

So, it does start with you. You cannot expect your subordinates to screw up the gumption to overcome all the things listed above to have the tough conversations. To overcome the hesitation, the British Army has instituted a policy of "obligation to dissent" -- better to have your subordinates poke holes in your plan before the enemy does.

For decades now, we at Forrest have pushed the idea that all employees are accountable to give their manager their Best Advice. Best Advice is a softer form of obligation to dissent. We distinguish it by saying it is an accountability. It means that a manager must demand it and apply consequences if they don't get it. It can't be left to a person feeling obliged, but rather it is the manager that must prompt for it.

We have seen how the organizational culture changes when the accountability for Best Advice is applied. For that change to occur, it is not just talking about it, but applying consequences - good or bad - for the Best Advice received.

Now a cautionary tale here, beware of the genie you unleash because it requires follow-through. You have to be ready to "put your tin hat on" to quote a former CEO's warning to his team. The Best Advice is probably something you did wrong or didn't do at all. So, check your ego, shelve your perfectionism, march into the hail of bullets and truly listen to what they are saying.

Once you have done that, though, it doesn't stop there; you need to coach your leaders below you to do the same. In this simple exercise, you will begin to create an even more engaged workforce. Your employees can no longer sit and let things happen. They need to tell you and your subordinate leaders what they see, what they think, and what needs to be done about it. Remember, you are not obligated to follow or implement the Best Advice, but you are obliged to tell them "why not".

So, give some thought to the nature of open and honest dialogue in this COVID age and get the Best Advice flowing. Now that we are working at a distance, you need to hear what people think.

Have a great weekend, stay safe and, my Best Advice, wear a mask.

Close Battle Revisited

17 July, 2020

It has been 19 weeks since I first sent out the Managing in the Maelstrom weekly missive. A lot of water has gone under the bridge since then. I thought this week it would be worthwhile going back to some of the concepts that I raised way back and to see where you are.

If you are like me, every day is like the film Groundhog Day. I find myself reflecting on Bill Murray in the film and see myself going through the same things day after day. If it is happening to me, I have assumed that I am not alone.

Upon reflection though I realise that I am stuck in the Close Battle. The Close Battle is characterised by routine and getting through day-to-day. It is like modern trench warfare where you have your routines in the defensive position and only rarely go on the offensive and only for short periods. In the First World War it was a monotonous time, where ritual and routine were the norm, and you rarely sallied forth. The offensive action took the form of raids, and when significant attacks occurred, they were costly and gained little ground. In other words, it was a battle of attrition that wore everyone down.

This is what seems to be happening now; we are in a defensive stance where we are trying to protect ourselves and our businesses. We spend our energy on keeping people safe and keeping the lights on. We have seen cases in the media this week where States in America manoeuvred and opened up only to find themselves back from where they started.

I discussed weeks ago the need to think and plan the Deep Battle. The euphemism that I used was the idea of the break-out to get out of the survival mode and into new realms. The Deep Battle was about planning the Strategy of what the future would bring, but now five months later, we are still in the Close Battle planning tactical wins to keep our businesses and people going.

How many have actually had the chance to plan the Deep Battle honestly? I get the sense that very few have been able to plan what the future for their businesses will be. We are all trying to get back to antebellum.

So here is my thought for this week if you and your people are worn down by the Close Battle. It is time to reassess the Deep Battle.

- If you don't have a Deep Battleplan, it's time to make one.
- If you do have a Deep Battleplan, it's time to review it.
- What has changed fundamentally since your first attempt at the Deep Battle?
- Be prepared to start from scratch.
- Are the earlier assumptions still valid?
- Is the plan still realistic?

Remember that even the act of planning the Deep Battle benefits you by engaging your people and getting their creative juices flowing regardless of the outcome.

The work of senior leaders is to plan, if you are caught up in the fray in the Close Battle, you will do your subordinates jobs, and they are probably better at it anyway. So ask yourself am I genuinely working at my level? If not, then start planning your break-out battle so that you can go deep.

Also, remember the axiom that "no plan survives first contact with the enemy". The enemy has a vote in your plans. You won't hit the bullseye every time, and you will sometimes miss the target entirely. Fear of imperfect execution or incomplete information is no excuse to not engage in the Deep Battleplan. Nobody knows for sure what the future holds, but it is safe to say that while many plans can be rendered useless by circumstance, the art of planning remains essential.

So once again have a great weekend, stay safe and all the very best to you and your family.

Steadfast

Your Story

24 July, 2020

As the summer rolls along, I am seeing the Back to School flyers arriving in the mail and reminded how September is always a time for re-launching. For years I have advocated that the beginning of September should be the real start of the New Year. After so many years of programming telling us that Labour Day is the time when things start anew, the feeling is that September will be the restart to so many of our businesses and projects.

In talking to our clients, it feels like many see the beginning of September as the re-launch of business. This September will look like no other in our memory. So many question marks remain about everything while we wait for the other shoe to drop signalling the Second Wave. After Labour Day will be a milestone, not the least because of the current drive to put kids back in school. September will be that next milestone to our path to getting "back to normal". As I mentioned weeks ago, there is a powerful force that drives humans to desire to get back to what we once had.

So, are you planning either consciously or unconsciously that September is a new start? If we come back in September to what are we coming back? What is the new way of work? Furthermore, who is coming back? As I mentioned my partner Tony made the comment that I have used ever since; "not everything has changed, but everyone has." The people who will be coming back to work will not be the same people who left in March. Pressures, struggles and circumstances have changed us all in some way. It will be the role of the leader to align these new people.

So if September is a new start, is it possible that now is the time for a radical re-think? Is it time to realise that the work has changed fundamentally, and it is time to find our true Purpose? Purpose is a reflection of intent. Purpose and thereby intention reflect our motivations, what we value and our character. We aren't talking about goals here; we are talking about who we really are. Is the pre-COVID world making you a boiling frog? Were you just comfortable sitting watching your life go by?

In The Leadership Path program, we challenge our participants to write their Story. The Story becomes their personal brand. We get these senior Directors and Vice Presidents to reflect truly on their Purpose. The exercise of reflection helps them to get in touch with their true selves. It gets them to explore the threads that hold them to their current world. From there they determine to either strengthen

or cut those threads. Their Story requires them to dig deep into who they are to enable them to be Authentic Leaders. We ask them to be able to answer these questions:

1. Who am I – what unique experiences have impacted me to make me behave the way I do?
2. Why am I here? – what is my Purpose and the Purpose of my work?
3. What am I trying to build? – when I leave here what is my legacy and what teachable point of view have I created for others?

Suppose you are like me, I annually have two inflexion points; New Year's day and September. This year's September has immense significance; it is not just the time to reflect on my personal Purpose, but the Purpose of our business. I would suggest that you spend the time to reflect as well. It will help to align your people. Developing your Story will help you launch your intentions. As we said, people have changed, and no doubt you have as well. Leadership is all about aligning people to a common direction, but you need to start with yourself first.

We have all the tools to help you write your Story, and I am willing to share if you would like.

Time to start and September is coming.

Take care and stay safe and of course, wear a mask.

Steadfast

From Steadfast to Vigilant

31 July, 2020

It's the end of July, and we are halfway through the summer (of our discontent?). Last week's missive was all about Purpose, and if you haven't taken the chance during the doldrums of summer to reflect on your Purpose and start developing your Story, I strongly recommend getting out of the close battle to do so. Even if you had a Story before, these COVID days would undoubtedly have had an impact on it.

This week's Managing the Maelstrom is a bit of a reflection. As you may have noted, I have ended the previous missives with "Steadfast". The gist of that term was to make us think in terms of being steadfast and resolute in the face of the changes that COVID brought. It was a spin on "keep calm and carry on." Ironically "Carry On" is the motto of the military Regiment I grew up in and later commanded, and "Steadfast" is the motto of the Brigade of soldiers I later commanded. So, as you can see, the concepts are firmly locked in my mind as a state of being.

In reflection this week, I think it is time to shelve Steadfast. I believe we are at a stage in the world that is different. We have watched as countries, states and cities have opened up in an attempt to get back to normal.

This has only, in turn, led to them having to backtrack, close down and retreat from normalcy. I believe the reason is a lack of discipline. People have not heeded the dangers that are ever-present and, as a result, have had to step back.

So, I think it is not so much a time to be Steadfast but a time to be Vigilant — have vigilance in all that we do. In previous missives, I have talked about risk: risk to health, and safety risk to business. Vigilance is about keeping an eye out for the dangers, but as the groundhog days have led to weeks and months, we have become complacent. A key indicator of the complacency is the spike in the under-40 infection rate.

As anyone in manufacturing knows, when you become complacent, injuries occur. So it is a time to be vigilant. Keep an eye to:

- Your health and safety
- The health and safety of your team

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- The risks of an attack on your business
 - The risks to you and your corporate ethics and integrity
 - The risks to your systems and supply chain
 - The risks to your customer

With vigilance, you will get through this. Without it, you will be stepping back again and again.
So keep calm and carry on, while being steadfast, and forever vigilant.

And of course, wear a mask.

Decision Making

7 August, 2020

As I sat down to write this, I pondered what thoughts would be valuable for you this week. I am not always sure this hits the mark, but they are missives based on my experiences and the challenges we are all facing during the pandemic. I wanted today's to be a tool you can use right away.

This week I was reminded, by several clients, of an issue that inhibits organizations: the lack of decision making. In our ranking of organizational pain points before COVID-19, it ranked as the number three issue. I understand anecdotally it has become worse as people are working from home and disconnected from the "mother ship."

We define decision making as choosing one thing and rejecting all others. The challenge for people making decisions is the inherent risk in choosing. It requires you to choose the one thing which is risky and then reject all the others, which is also fraught with peril.

The nature of risk is that it begets fear. Fear as an emotional reaction stymies our ability to act. As I often say, fear is really just unexplored risk. So decision making is always overshadowed by potential misstep, error, and our exposure to danger.

The decisions we make are often sub-optimal; they can take too long, be flawed, or be done too quickly. Added to these potential pitfalls are that, in the corporate context, they come under scrutiny. We get paid for the decisions that we make, and we make dozens of decisions every day; some are automatic, but others are far more complex. However, every one of them is overshadowed by risk.

In our research, the real reason people struggle with decisions is that they have no framework for making decisions. If you doubt me, try this: ask someone how they make decisions. Very rarely in my experience are people able to walk me through their thinking process. We find that when people don't have a framework, they do not trust their decisions, which leads to a lack of timely decisions. When they don't have a structure, they can be prejudiced in their decisions opting for the quick solution. Finally, if they don't have a framework, they are open to all sorts of challenges from others firmly rooted in the perils of risk. Ultimately, if I can't show you my thinking, you likely won't trust me.

So here is a brief framework for decisions (the tool I promised you):

- Purpose – what am I truly trying to solve here? What is the goal of the decision?
- Criteria – what criteria will I use to achieve the purpose? What do we need, and what do we want?
- Options – what new possibilities might meet the purpose and criteria?
- Information – what do we know about the options against the criteria?
- Evaluate – which options met all the needs and satisfied the wants?
- Risk – what is the worst case that can happen if we choose that option and what is the probability and severity of the worst case coming to pass?

As you will note, the decision process finishes with assessing the risk. It is essential to think through the three steps of risk:

1. Imagine, what is the worst case? – because that is the most dangerous; hence riskiest
2. What is the likelihood? – requires you to make a subjective guess
3. What is the severity? – means you subjectively assess the danger of it.

Some things will be more severe but less likely, and some will be more likely but less severe.

Then you can make your final call, which is the chosen option, rejecting all others.

The risk assessment is a tool you can deploy at any time, and the moment you use it, you will remove the emotion of fear and clear your head – guaranteed.

My final observation is that I've made the decision to wear a mask. I feel the risk is worth it.

Steadfast and vigilant, have a great weekend

Taking a Break

14 August, 2020

This week's Managing the Maelstrom will be a short one. I decided to take my own advice and took some time and got away to a resort with my family this week; hence the shortness and the theme for this missive. I was pondering what to cover this week, especially given last week's substantial discussion on decision making, and then it hit me.

In previous missives, I have discussed the need for you to take time for yourself and to recharge. Now having done it, I can't agree more. The change was indeed as good as a rest, and I managed to do both. The issue that I considered is the fact that many people I know have not taken enough time off.

For some of us, though, the thought of rest/vacation can be as anxiety or panic-inducing as not having time off. There is a type of arrogance of being too essential to be away, or the fear of missing out, and both can cause a lot of angst as well. There will be a delicate dance needed to discover what "time off" means, in a way that is healthiest and right for each person. Even if you can't take a week away, committing to working shorter hours, having non-communications time, or personal project time is equally valuable and will help refresh through change.

Here is where the concern lies. We are all on tenterhooks waiting for the next waves of COVID to hit. If you haven't taken the time to recharge, then you will be going into the next rounds of mayhem with depleted energy. We know that the end of August and beginning of September are going to represent changes to the norm we have lived these last few months, so the best thing is to be revitalized going into them.

If you haven't managed to get time yet, you have likely been fighting the close battle. I was fighting the Close Battle, and the time away has given me the energy to take on the Deep Battle. I believe the changes and challenges we will face in September will rival those we met in March. Whether the changes are getting back to normal as we try to get back to work or a new wave while our children are going back to school, they will impact you, your teams, as well as families. All of these will be challenges that will require your best thinking and your energies.

So, my advice is to try to take some time and recharge, reshape, and re-balance your energy. In previous missives, I have recommended to delegate as much as possible and leave the Close Battle to your lieutenants. Your team and your family will thank you. You add to your risks by not being on top of your game, so help yourself and the organization.

My bet is you have likely been making sure your people take time, and now is the time for you to take your own advice. It is no good arriving to battle exhausted; you need to be fresh.

I wish you a terrific weekend and all the very best to your family.

Steadfast and Vigilant

Decision Making #2

21 August, 2020

Well, it has now been 24 weeks since my first missive. I hope you took last week's to heart and took some well-earned vacation. Many people that I have talked to reiterated that it was great to get away and clear their head (or escape the same four walls of 23 weeks).

This week, I thought I would revisit one of the topics I raised two weeks ago, in that I posited that Decision Making was a critical skill that businesses lacked. Businesses lacked it because people don't have a framework and were never taught how to make a decision. Without a framework, we don't trust our own decisions, and we don't trust the choices of others.

I also posited that decision making is inextricably linked to risk; all decisions are fraught with risk. If you have no framework, then you are fodder for fear. Lack of thinking process is the tactical reason why we don't make decisions. So, for this week, I thought I would explore the operational reasons we don't make decisions.

At the operational level, the issue is that, inside organisations, people are unclear whose decision it is. The problem of the lack of clarity of decision rights is as severe as the tactical. When you put the two together, they are a powerfully destructive force in your organisation and teams.

Right now in your organisation, there are employees caught unsure of who can make a particular decision. If I am unsure, then I will also weigh in on the decisions that are made. It is because we all have opinions. This can muddy the waters and reduce clarity.

If you disagree with me (and many CEOs do on these points), here are the hallmarks of lack of clarity of decision authority. See if any fit your organisation:

- Stalled initiatives
- Endless email traffic
- Endless "cc" or even "bcc"
- Endless meetings
- Numerous committees
- Unlimited phone calls and check-ins

- Everyone in meetings
- White Knights charging about "fixing" things
- Finger-pointing or the "blame game"
- Challenges to the decisions that are made
- Lack of trust between groups
- Escalation of minor issues
- Silos in the organisation
- Continually revisiting decisions
- Limited to no new ideas coming forward
- Sycophantically responding to bosses

Do any of these resonate?

What you won't necessarily see are the emotional signs of the lack of clarity of decision authority:

- Stress
- Sleeplessness
- Exhaustion
- Depression
- Guilt

During the COVID age, these are even worse because employees are stuck at home and putting on a brave face when they do see you over virtual means.

BUT, enough doom and gloom; there is a solution. It is the exercise of Role Clarity. Right now, we are busiest in this realm because many of our client organisations have realised that overcoming these issues is their competitive edge. COVID exposed this Achilles heel when everyone launched from the cocoon of the office where we used to get clarity through osmosis at the water cooler. Once at home, they are left to their own devices, literally.

The solution is taking the time to do Role Clarity before the shoe or flag drops, and we are racing again in the Fall. Role Clarity is at the individual level and is:

- Clarity of the mandate of an individual's work
- Clarity of accountability

- Clarity of authority
- Clarity of resources and, foremost,
- Clarity of decision making

If you do this, you unleash the potential of the organisation.

Have a great weekend, stay safe and of course

Vigilant and Steadfast

Organizational Pain

28 August, 2020

It's been an interesting week. As follow up to last week's discussion of lack of decision-making authority, this week opened up with many conversations about organizational pain from various businesses and sectors. For several years now, Forrest has been collecting what employees feel are causing them pain at work. We gather the symptoms to diagnose the real cause correctly. Too often, we see assumptions of the causes resulting in applying the wrong solution.

Imagine this, we all have various forms of pain in our body (as I get older, this becomes truer). In many cases, we ignore or work through the pain. Sometimes, if we don't deal with it, our body adjusts resulting in something else getting out of whack and pain crops up elsewhere. We take a pill in some cases, and that alleviates the pain and lasts for a while, but we haven't solved it. If we don't solve it, we burn too much energy to overcome the pain and experience distress. Distress is when we have burned more energy and have not recovered. We then get unwell and have still not dealt with the pain.

The same is true for organizations. The pain of day-to-day makes the organization unwell, it can't bounce back, and it gets over-weighted in distress.

Based on our pre-COVID research, here is what organizations typically see as the top 11 pain points.

See if any reflect your organization:

- Managerial Ineffectiveness
- Unproductive meetings
- Lack of trust
- Lack of decision making
- Resource squabbles
- Work overloading
- Ineffective policies
- Lack of innovation
- Ineffectiveness
- Poor strategy and implementation
- Lack of talent

My research with CEOs has seen these as their top pain points:

- We are not hitting targets
- We are doing the same things the same way
- We have a disengaged workforce
- We are not servicing the customer well enough

When we get the pain, the first question we ask is "whose problem is this?"

As you know, the answer is that this is management's problem. This isn't the employees' fault. For any of these, the problem is our managers.

Since the advent of the pandemic, all of these pain points are still there. But what is screaming loud and clear from organizations is that overloading is much worse, and the symptom falling out of that is exhaustion. When we asked a conference of HR professionals for their feedback on the top three of the eleven issues, their response was:

1. Overloading
2. Managerial ineffectiveness, and
3. Unproductive meetings

As you can see, the pandemic is just accentuating the problems. So, the prescription? Well, as you might have expected from me, all these issues emanate from a lack of clear accountability and authority.

If you want to fix it, that is where you must start. As I said last week, a lack of clarity on whose decision it is is merely an issue of who can make decisions. This is why Role Clarity is the focus of Forrest and Company's client work during this age of COVID.

I hope this helps. So, as you look at August's waning days, ask yourself, are we overloaded, and how are my leaders contributing to the pain in the organization?

Stay safe and take care of yourself and your family.

Vigilant and Steadfast

Enlightened Leadership

4 September, 2020

I promise this week's missive will be a brief one. The last couple of weeks have been heavy with content laden topics, all of which I think are valuable to you, but thick nonetheless.

This week I want to come back to a topic from over a month ago. I was commenting on back to school and how September is the start of the new year. Well, here we are.

What brought it home was that we still don't know any more about COVID and the future. I was alarmed by a statistic that asked when companies would go back to "normal". The most significant response, over a third, said they had no idea. The next biggest group was just over a tenth and said Q1 2021.

The point is that we still live in a world where we don't know, and yet we all want to think we know, and we hope our leaders have it all figured out. Well, newsflash; they don't, just like the doctors, they are working it out as it goes.

So what is the implication for you? Well, many people are looking to you for answers. So what do you do as a leader if you don't have the answers? One possible solution is to make it up; however, that rarely goes well.

What we have found is that people need the Enlightened Leader to get them through this. I have to say that one thing COVID has provided is an opportunity for Enlightened Leadership. I am pleased to say I have seen many cases of this. We define enlightened leadership with three traits:

- The Authentic Leader – this is the leader in touch with their true self. It is the leader who admits they don't know it all and can be very honest with their people.
- The Servant leader – this is the leader who realises that the success of their people is their success. They tune into what their people need in these challenging times. The servant is the empathetic leader.
- The Transformational Leader – this is the most challenging part of Enlightened Leadership. Transformational Leadership is leading through a vision of a better place. It is about stepping out of the reality of what is now and looking to the future. In these challenging days, it is about seeing the need to change and improve and taking the time now to do it.

I am not suggesting you aren't doing these things now; far from it. But if you are like me, you need a little reminder (in my case, a big reminder) that this is what people need. I would suggest that we live in an age where we are not getting these things from our public leaders, so your people will need it from you and your subordinate leaders.

Finally, take this weekend to recharge and hit the ground running; there are more upheavals ahead, so you need to be taking care of yourself to manage through it.

Stay safe, wear a mask and all the very best to your family and you.

Vigilant and Steadfast

Authentic Leadership

11 September, 2020

Here we are now, 27 weeks since the first missive I wrote, and it is amazing to see what has transpired over time. It seems like there is a positive vibe coming as schools start to open, and businesses open up even further. Of course, the fear remains for the dreaded second wave, but we shall see.

Last week I introduced the idea of the Enlightened Leader. As the week went on, I started to see some un-enlightened leadership signs, so I thought I would begin to drill down into the model. Of course, this is not for you alone to shoulder, so you may wish to consider your subordinate managers and feel free to pass this on to them.

The first element of enlightened leadership is Authentic Leadership. We define this as the leader being themselves. Having taken the time for introspection, an Authentic Leader has a heightened sense of self-awareness. They have pondered what makes them do what they do. That may seem odd but, too often, we behave in a way to feed an unknown set of desires that have been programmed into us, either by DNA or experience. (As a note, when someone tells me they “are self-aware”, they usually are not.)

This awareness enables us to:

1. Understand our strengths and limitations;
2. Understand our goals and objectives in life;
3. Have and live by integrity to our true selves;
4. Be open to others and willing to hear opposing views and the “bad news”.

In essence, it is to be real. To be true to who you really are and not who you think you should be. I believe I will someday write the book – “First, Burn All Your Business Books”, because I think in many cases we try to emulate things that have no relation to our real world. We believe we should be like... (you fill in the blanks). This leads to incongruity with our true selves and often leads to dysfunction and issues with others. People can sense it. There is no quick fix to being a leader; no pill, no short cut. It requires self-reflection and openness.

I've noticed recently that lack of authenticity manifests itself in generally three destructive traits that all interrelate:

1. Feeling like an imposter – The imposter syndrome is alive and well. If I do not reflect on my beliefs and upbringing I can feel like a pretender in my role. As a result, I don't fully engage and shy away in fulfilling my accountabilities.
2. Lack of confidence – Lack of confidence can result from imposter syndrome but, without taking stock of my strengths and capabilities, how can I be truly confident? Again, I may not fully commit to my role as a leader. Furthermore, a lack of confidence can make me feel small in relation to others. This leads me to behave badly to others by either challenging or over-controlling.
3. Not listening to others – Lack of confidence and imposter syndrome can all lead me to not listen to others. I may not feel comfortable enough to be challenged and have my logic tested, so I create an awful place to work where others' opinions are ignored.

To be clear, I am no saint and have lived these three above. It is hard to overcome these without being genuinely Authentic. Again, consider sharing this with your team and encourage authenticity throughout the organization.

Take care and stay safe

Vigilant and Steadfast

Servant Leadership

18 September, 2020

Welcome to the Friday of the Ides of September. At this point, we have all got back to school and are just waiting to see how long the normalcy lasts.

The last two weeks' missives have been about what we term "The Enlightened Leader". There is nothing pejorative about the phrase; instead it is used to denote leaders who have a particular philosophy made up of authenticity, servant orientation and a focus on transformation.

Last week I wrote about Authentic Leadership – or having a heightened sense of self-awareness. This week's topic is Servant Leadership.

There are a lot of books on Servant Leadership; it has become a bit faddish. My perspective on Servant Leadership is from my earliest leadership training in the Army, 38 years ago (yes, that long ago). For me, the phrase that best denotes Servant Leadership is "leaders eat last".

Now, unlike Simon Sinek, who wrote a book about this and made lots of money from it, I lived it. It is a concept instilled in Junior Officers from day one. The premise is, you need to take care of your team first because they do the heavy lifting for you. It is not about ego and power position; it is for the care and concern of your people. As an example, we had to keep a Platoon Commander's Notebook where we had everyone's details, including the names of their family members, their hobbies, right down to their shoe size. We had to know and care about every aspect of the 31 soldiers under our command. All heady stuff for a 20-year-old. But I digress.

Servant Leadership is critical even more so in this age. We need to care because we rely on our people for our success and the success of our mission. Too often, leaders lose sight of this. As one client said to me this week, about the thousands of employees working for him, that "we need to know and care for everyone because everyone is struggling in some way or another right now".

Our characterisation of Servant Leadership is embodied in our golden rule of leadership – "know your people and promote their welfare". Honestly know what makes them tick and make sure that you understand them in detail.

The successful Servant Leader lives by these four tenets:

1. Seek and accept responsibility for your team and lead them by example
2. Ensure that your team truly understands your intent and direction
3. Encourage their thinking and input because they are closest to the action
4. Fully understand their capability and always maintain or enhance their self-esteem

In a nutshell, their success is your success. I really mean this; it is not a pat statement that people regurgitate. If you don't live by these steps above, you will not achieve this level of success.

Too often, though, we don't practice Servant Leadership. In many cases, it is because we are not Authentic Leaders. Instead, we are driven by our ego and our need to control people. Servant Leaders need humility. You are performing a critical role to unleash the potential of your people. If you have personal interferences in doing this, you will not be successful.

So take the time and ask yourself, do you live by this credo? Do your leaders live by this philosophy, or are they just collecting paycheques? Authentic and Servant Leadership, as part of the Enlightened Leader, are mindsets and need to be practised and need a disciplined approach.

Take care of yourself and your family,

Vigilant and Steadfast

Transformational Leadership

25 September, 2020

The weather seems to be holding, but I would say that we are well on our way to the second wave.

This week, I thought I would continue to outline the Enlightened Leader model that I started three weeks ago. So far, I shared with you the model overall and then two of the elements, Authentic and Servant Leadership.

The third and final element is Transformational Leadership. This topic is the one that has the least written about it, but has potentially the most significant import in the COVID era because of its focus on the future, and on building for the future.

Its roots are summed up by the direction I received when I took command of a new team, unit or formation. This direction was to “leave it in a better state than you found it”. It wasn’t good enough to achieve your goals; it was about making things better. At its source is the notion of Continuous Improvement. The exercise of leadership over others is always an exercise of Continuous Improvement.

Our job as leaders is to help people to get better and to transform themselves and, therefore, our organizations. Organizations don’t change because we decree we need more of this and less than that, they change by the efforts of energetic human beings. Leaders who do not understand this are destined to be very disappointed indeed.

What annoys me these days is the assumption, by many leaders, that they can get to their goals by hiring better people. They don’t realize that their work is to transform the people they already have and help them grow in their careers, not just to be tossed on a slag heap because they can’t hit the goal right now or, god forbid, they made a mistake. Integral to Transformational Leadership is learning from mistakes and allowing for errors. Transformation doesn’t come from a perfectionist mindset but rather a growth mindset that sees people and learning along the way. Therefore to practice Transformational Leadership, you need to be Authentic and clear on your foibles, and you need to be Servant to help your people.

Transformational Leadership is about being the change agent for your organization. It is about change that creates great places to work. Leaders that transform:

- Have a vision and lead by it
- Develop the leadership potential of their Direct Reports
- Inspire a desire in others by example
- Manage the tension between the current state and future goals

In short, they point the way by breathing life into others. They don't get caught in the reality loop. Instead, they choose to look towards the possibilities of a better future.

So ask yourself, do my leaders think this way? We don't have to transform the whole organization, we merely have to change our team. As I ask every leader when they take over a new team, what will be your legacy in three years?

Why this is important now is that our people sit on a precipice where the current reality can appear bleak. They are trying to work while balancing significant issues at home. There is no certainty right now, so leading people through this age is critical. Inspiring them is essential; it will give them the breath of air to deal with the stressors coming at them. If we can do it, we will in turn, gain their confidence and trust. As we enter the second wave, we will need leaders who don't get caught in the maelstrom with their people, but who can see through to the other side.

I wish you all the best in your journey to be an Enlightened Leader; the world needs more of them as we deal with the maelstrom.

Vigilant and Steadfast

The Profession of Managerial Leadership

2 October, 2020

Someone posed an interesting question to me this week – “What is the biggest problem in organizations today?” It took me a moment, but I reflected on why, over the last few weeks, I have been writing on the Enlightened Leader. I firmly believe that the issue facing organizations, is there is no sense of a professional managerial-leadership class of roles. In other words, there is no common profession of management. In the military, there is a profession of arms. It is a common approach across nations and relies on developing and instilling a sense that leading people is an honourable profession.

The Enlightened Leader is part of the profession of managerial-leadership. It is the ethos that the leader uses to infuse their management skills. Their management skills encompassed by the Accountability Management System, defines work, organizes work, and ensures its delivery.

The Enlightened Leader, as I have said in the last few weeks, is made up of three elements of Leadership. These are Authentic, Servant and Transformational Leadership. I defined them in the past, but this week I thought it necessary to explain how to exercise these leadership traits.

1. Authentic Leadership requires you to look deep inside yourself. What makes you tick. It means you must ask:
 - a. What is essential, and what do I really need?
 - b. What is important, and what do I want?
 - c. What do I truly stand for, and what am I unwavering in?
 - d. What are my strengths and weaknesses?
 - e. What insight will others give me?
 - f. What opposing views can I consider fairly to challenge myself truly?
2. Servant Leadership requires you to look yourself in the eye to the truth. For this, you must ask:
 - a. Do I believe that people can be intrinsically good?
 - b. Do I truly value being in a leadership role?
 - c. Do I truly value my Direct Reports and their efforts?
 - d. Do I truly see my role is to help others?
 - e. Can I sense how others may be feeling, and do I value that?

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3. Transformational Leadership requires you to inspire others and breathe life into them. To do this, consider asking:
- a. What might success look like?
 - b. What might be a better state, and how might we get there?
 - c. How might I instill a passion for reaching that place?
 - d. How might we challenge the status quo and tip over the sacred cows?
 - e. How might I walk this talk to show others the way?
 - f. Am I sure we can't, and am I sure we can get there?

Being an Enlightened Leader is the first step to professional managerial-leadership. It is about taking the time to think through these things to understand who you are as a leader.

Now, more than ever, we need a profession of managerial-leadership just as now we need Enlightened Leaders. As we go into the dark of winter with all the external challenges, our people need leaders who take their roles seriously and are there for them to help them through to the other side, caring for them and driven by a North Star

Take care, and stay safe.

All the best to you and your family

Enlightened Leadership and Mental Health

9 October, 2020

As we face continued uncertainty in the news these days, I saw an interesting event that caught my attention. It was a tossed-off comment on social media that described a Commander in the Army leading a training session for his troops on mental health at work. It was timely given that this is Canadian Mental Illness Awareness Week and tomorrow is World Mental Health Day.

But it got me thinking -- in business, how many leaders are teaching their people about mental health and what actually to do about it? Several of my missives have referred to my concerns about mental health in the workplace. COVID is adding new dimensions to the challenges for people's physical and mental health. Now, more than ever, is the time for the Enlightened Leader. I would point out that Enlightened Leadership is a way of being. As individual leaders, while we should exercise the traits, we must ensure the leaders under us are exercising the characteristics.

A critical role for Enlightened Leaders is ensuring that their leaders are looking to the mental health of their people. Business needs to understand that, by and large, the work is done by human beings. That humanness means we need to ensure the physical, social, and psychological health of our employees. Unions were initially created to protect the physical health of employees. Legislation now forces business to focus on some elements of social and psychological, but it is scattered.

I would argue that, to embrace the safety needs of your employees, your leaders need to practice the three elements of the Enlightened Leader; Authentic, Servant and Transformational leadership. I will start with Servant first.

Servant leadership shows up by:

1. Embracing the mindset that their role is to look after the welfare of their people.
2. Looking for the chinks in the armour of their people and truly sensing them.
3. Anticipating and digging to make sure that their people are well and understand the spectrum of wellness.
4. Imagining how would they feel right now if they were not in control of the situation.

To exercise Authentic Leadership, your leaders need to:

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1. Be very real and human and genuinely realize that people are emotional creatures and feel emotion.
 2. Embrace the foibles and failings that come with being human.
 3. Share their mistakes and failings.
 4. Speak the truth and not let things slip off the table and, in particular, express how they, themselves, are feeling

Finally, they need to exercise Transformational Leadership by:

1. Understanding that their role is to boost morale at all times and, with that boost, to help their people see better days.
2. Helping their people embrace change and encouraging them to find ways to change.
3. Creating the vision that inspires people through the dark days and re-describing to find the silver linings.
4. Encouraging their employees to use their judgement and discretion in their work to make decisions and, in turn, gain a sense of control.

Leadership is about being human and understanding the true nature of humanity. If your leaders don't like leading, they need to find other work. The Enlightened Leader exercises "force protection" and makes sure that they move as fast as their slowest person so that their teams stick together. They cannot leave anyone behind because the leader's role is to build a team of increasingly capable Direct Reports.

Historically, Human Resource processes and handbooks generally have practices to deal with physical illnesses and issues, but we need to understand that there is no health without mental health. We need to navigate these challenging times by adjusting our behaviours, attitudes, lifestyles and social interactions to recognize the impact of mental health on physical health, and both of these on our workforce.

So again ask yourselves -- are your leaders addressing mental health in a period of a mental health crisis? It is what is needed in today's society, and since people spend the bulk of their waking lives working for you, they need leaders who care.

Wishing you and your family all the very best for a long weekend.

Team One and Team Two

16 October, 2020

It is hard to believe it is now 32 weeks since my first missive. Overall, these weeks I have written these missives as a reminder or a sharpener for you. It has not been the case that I don't think you have been doing or thinking of these issues; rather, I, like everyone else, need a reminder now and again.

I hope after all these days there may have been some points of value in my musings. The last thing I want to do is add to your overburdened inbox.

Many of the missives are based on discussions with the Forrest & Company clients. This week will be no exception.

This week's is about an issue that was huge before COVID struck but is exacerbated by the current state of the world. It is core to effective teams and organizations. It is the idea that each of us is a member of two teams: Team 1 and Team 2. Team 1 represents the one to which you belong first; your manager's team. Team 2 is the team that you, in turn, lead.

The first part of this delineation is to point out that we must be followers first before we lead our own teams. Even the CEO has to follow the Board and the Chair first before they lead their team. There is not a lot written down about followership, but it is crucial to leadership. Knowing when to lead, and when to follow, is a distinction few can make properly. There is a synergy between the leader and the follower that makes Team 1 and Team 2 effective. Followership, too, is a discipline, and there are times when you need to buckle down and follow before you should step anywhere near leading.

The second delineation is that a team or organization needs to have lateral integration before vertical execution. We need to be laterally integrated with our peers in Team 1 before we go to execute with our Team 2 vertically. The real issue is that too often we are not laterally integrated and instead go straight to vertical execution. The hallmarks of teams not laterally integrated are:

1. Silos
2. Arguments over resources
3. Confusion
4. Missed deadlines

5. Lack of Trust

COVID era has made this worse, especially when people are not physically working together. It has left people to rush to get on with things in a tyranny of vertical execution because we feel better doing something; anything. If an Executive team is not vertically integrated then the shock waves flow throughout the organization. As you can imagine, in the age of COVID, the shock waves grow exponentially.

So what to do about it? There are five things the leader needs to do to integrate their team laterally:

1. Clarify context and strategy. You need to get them on the same page.
2. Neutralize any resistance to the way forward. After you have heard their concerns and reflected and perhaps changed plans, you need to demand they all leave the room aligned.
3. Define the work for everyone, including accountability and authority. This is important to ensure they know what the expectations are and how they are to work together.
4. Define how people need to behave. This is the most important; everyone is different; you need to set the standard of expectation for behaviour.
5. Today, now more than ever, people need this clarity. If you think you are there already I suggest you reflect and challenge yourself in the interest of continuous improvement; can we have more lateral integration? I know I have to challenge myself all the time.

Wishing you and your family a great weekend

Stay safe and wear a mask

Vigilant and Steadfast

Spheres of Control

23 October, 2020

As you can imagine, after 33 weeks, it sometimes can be hard to think about a topic that might be of value to you. Well, luckily we have the advantage of speaking weekly with our clients and getting a sense of what are the issues on the front-lines.

An issue that came up this week was a common one that we all have to face: what do you do when your employees are feeling overwhelmed by what is going on around them? In our research, the number one issue that employees faced before COVID was feeling overworked and overwhelmed. Now, in the COVID era, the feeling is uncertainty.

Now and again, we all feel powerless over our environment. It makes us feel that we are at the whim of the tides. No wonder the ancient Greeks chose to believe that the Gods left you to the fates. The less we can control, the more we are uncomfortable. This aspect of the human condition is the reason people resist change.

So how to help ourselves and others to deal with this feeling? In our experience, it is crucial to understand the nature of control and to come to explore our relationship with our need to be in control.

I have found the model of the spheres of control below helps people to explore the nature of their angst. In this model, there are three spheres, and we need to examine and categorize our need to exert power through these spheres.

The first sphere is the most important; it is where I have full control. In the work environment, this is the realm where I have clarity of what I am to deliver. It delineates the limits and extents of my authority. As leaders, our role is to make sure our employees are clear on what is their sphere of full control. If we don't, they will always feel uncomfortable because they feel powerless.

The next sphere is that which we have only partial control; the sphere of influence. The sphere of influence is where my efforts, at best, give me only a 50% chance of being in control. In this sphere, I only have control over my behaviour and responses and may only be able to influence others. This is characterized by the nature of our conversations with others. It is vital for us, as leaders, to make sure

our employees understand where they only have partial control and to be satisfied that this is the limit of their ability to exercise their power over this sphere. At the same time, encourage employees to exercise their ability to influence others and make it evident that inability to influence is not a failing but is the nature of dialogue.

Finally in my experiences, the sphere that we inadvertently spend most of our time fretting over is the sphere of interest. It is the sphere where we have no control whatsoever. When we spend our time in this sphere, we find ourselves fretting over issues that we can do nothing about. Our interests can lead to emotional responses and can become unhealthy. I may take an interest and spend time concerned over the election in a week but I have absolutely no control over the outcome.

So how to help your people? First is to define the nature of the sphere of full control. Assist them in managing their sphere of influence and help them to understand the waste of energy and emotion focussing on the realm where they have no control. There are many issues that we will have no control over, and it is crucial to understand how, if left unexplored, they can be toxic.

My thought is I think it may make leaders uncomfortable to go into the final sphere with their employees because that is the realm of biggest emotion. We'd all love to be able to control the world about us, but the truth is that we can't. At the theoretical level, this is nothing new and we are aware of it, but at the emotional level, it can be very difficult. So Leaders need to be prepared to confront the emotional as well. Since emotions are unpredictable, this pulls leaders into that sphere as well so a leader would have to be prepared to confront their own feelings of uncertainty before approaching their employees.

Enjoy watching the events unfold over the next few weeks whether you had partial or no control over the events as they unfold.

Take care and stay safe – you may find this model helpful for your family as well.

Sacrifice

30 October, 2020

This has been quite a week. I can't remember a more tumultuous week in recent memory. For those of you have struggled to make sense of it all; hopefully, last week's missive on Spheres of Control helped.

In Canada, this week is Remembrance Week, and so, like before, I thought it essential to focus on this topic. COVID has changed many things, including how we will remember at the 11th hour of the 11th month. But remember we must, and this is why.

Last night I had the honour of being the only non-serving member at a military drum head Ceremony of Remembrance. I was there in an official capacity, but it gave me time and got me to reflect. Those taking part were Reservists. Many had served in Afghanistan, but all had other lives as workers or students. These soldiers, representing all sectors of society, were there to acknowledge the fallen as they had done every year.

Every year the roll is called of those veterans who have fallen over the year. Most are so old; the young soldiers cannot always connect with them. Their common bond, however, is service to the nation. This year is different. In the space of 365 days, two young soldiers had taken their lives. The troops weren't thinking of the old and bold; they were reflecting on friends they had known and served with.

It got me thinking that sacrifice comes in many forms and to many different degrees. So what are the sacrifices you have made for your organization? What sort of sacrifices have your people made for their families, loved ones, their communities and your business? I am not equating willingness to put your life on the line with working on Zoom until 11 PM. However, how good are you at noticing and recognizing those employees who are putting service before self?

In the past missives, I have spoken of the importance of mental health. Our role as leaders is to know our people and promote their welfare. So we need to know what they are dealing with and help them through.

For yourself, think about this as well. Who are you talking to? Who is your battle buddy to help you through the storms? Your mental health is just as important as your physical health. Your people need you at your peak to help them through.

Perhaps on the 11th hour of the 11th day, you can join me in doorstep remembrance. Since we can't go to cenotaphs, stand on your doorstep for 2 minutes of silence to acknowledge those that have given their tomorrows for your today.

Lest we forget

Mission Command

6 November, 2020

Today is the post Remembrance, Veterans, Armistice Day Managing the Maelstrom Missive. The thought for this week came from Forrest & Company's very own Chris Corrigan. A former commander of the Canadian Forces in Bosnia and currently a mentor at the Command and Staff College. Chris and I got talking about the role of a military concept of mission command, and its application for business in the COVID era.

Mission Command is the process by which commanders (leaders) issue direction to their personnel. It came out of Prussian losses in 1806 and was effectively utilized by the Germans 100 years ago in the First World War. It wasn't until after the Second World war, that the NATO allies US Canada etc. embraced it and it became the mode of operations in the 1990's. It is the forbearer of empowerment in business as it became translated by military veterans into business.

It is ideally suited to the VUCA world we live in today; the volatile, uncertain, complex, and ambiguous world. In Afghanistan, it was critical to enable decentralized execution and ensure elasticity in highly complex environments. It is to allow some independence of action while, on the other, would preclude misguided action by lower-level leaders.

It is to enable decision making at the lowest levels and to 'empower' leaders to fulfill the mission with the least amount of involvement from their leaders. The involvement all comes at the start by clear direction.

Two things the mission command leader needs to consider, before they issue their direction, is the context of activity and the capability of their direct reports. Critical to Mission Command is to understand the bigger picture to enable decision making at lower levels. This is balanced with making sure that your leaders have the skills, knowledge, attitude, and motivation as well as the cognitive capacity to achieve the goals.

As a Mission Command leader you must:

- Ensure your leaders understand your intent.
- Tell them the effect you want and why.

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- Make certain you consider the cross-functionality of any task you give and who they need to relate to.
 - Ensure they understand the big picture and the extent and limit of their authority.
 - Allocate the appropriate resources to achieve their tasks.
 - Limit your constraints to enable freedom of action.
 - Allow your leaders to decide, within their delegated freedom of action, how best to achieve their tasks.

In the COVID era, where our people are working from home or are not around the corner near the water cooler to check in on, Mission Command's direction empowers them to get on with the work. It enables us to work at the appropriate level, removes silos, and stops micromanagement. As I have said, we need Enlightened Leaders who practice Authentic, Servant and Transformational leadership. Mission Command is a way to transform your organization.

I could go on about this for pages, but it is Friday, so I wish you the very best for the weekend. Stay safe, practice physical distancing and wear a mask

Resiliency

13 November, 2020

Welcome to the 36th missive. This week started with the topic of resiliency. In the past, I haven't written about resiliency because it was everywhere when the pandemic started. Every other consulting firm had a piece on it. The interesting thing is that resiliency is about recovery, elasticity and getting back to something. In this instance, resiliency is about getting back to being healthy

This week, in particular, I believe we are on the cusp of crises. We are in full-blown wave 2 and people have been working extremely hard for at least 36 weeks to deal with the pandemic. We have all burned energy to be resilient and get ourselves back. This week I spoke to too many clients where the strain is really showing.

As a reminder, mental health is broken into 4 stages:

1. Healthy – normal mood fluctuations, sense of humour, physically and socially active, normal sleep.
2. Reacting – irritable, impatient, intrusive thoughts, procrastination, changes in eating.
3. Injured – negative attitude, trouble focussing, pulling away from others, tiredness or fatigue, frequent use of alcohol.
4. Ill – anxiety, panic, inability to concentrate, withdrawal, cannot sleep, significant impact due to substance abuse.

I am giving this to you because I think it is essential to reflect and assess where you are. As an example, I have found myself too often “Reacting”. We as leaders need to be on top of our game before we can deal with and help others.

The stresses and strains that our people are going through are probably going to get worse. The prospect of lockdown, Christmas, the further shortening of days and finally cold weather will likely adversely impact our teams. Our job will be to dig deeper beyond the “I am ok” response.

I believe there are four things that we, as leaders, need to do:

1. Self Assess – Where are you right now? If need be, what do you need to do to move from where you are to healthy?

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2. Truly Listen – You need to listen to others and imagine where they might be. It is best if you reinforce to them how mental health can be an issue and there is no stigma to it.
 3. Share – Share your journey and discuss the signs of mental health. They must understand that they need to be vigilant in taking care of themselves.
 4. Follow-Up – We need to follow up and check-in. This is where we can often fall off

As a final thought, always check in on the mental health in their home environment. So many are working from home where there can be issues. In other cases, they may be distracted and worried about the health of family and friends. The same is for you to remember it isn't just adults that are suffering.

As a sidebar in the missive from week 16, I discussed coping mechanisms and thinking mechanisms for resiliency, but can provide more detail on all these issues.

So again, remain vigilant and steadfast. I wish the very best for you and your family and the very best luck in reinforcing your coping mechanisms.

Operational Tempo

20 November, 2020

As we watch the rollout of Thanksgiving in the US this week, it is important to realize where we are. For me, the realization that we are this close to the New Year was alarming. The usual refrain of “where did the time go?” comes to mind. Earlier in the missives, I explained the analogy of the Close Battle and the Deep Battle – well 2021 was the Deep Battle then; now with just over a month to go, it has become the Close Battle.

The Close Battle is the tactical battle; it is characterized by the focus on people, processes, and resources. The Deep Battle is the strategic and operational level that focuses on looking further out. This week, I intend to talk about your plans for the close battle – what planning will you do, now, to set your team and organization up for the advent of a New Year? The Deep Battle now is how will you get back to business when you can put everyone back together after the arrival of much-vaunted vaccine rollout.

The New Year will be an inflexion point for everyone. It is that moment that we irrationally believe that the “dumpster fire” of 2020 will end and we can start afresh. So, what will you do for your team in the next few weeks? What is your plan?

My sense from clients is that the operational tempos are very high right now in the run down to the year-end. So imagine for a moment, your employees hard at work at home or in the workplace. What are they feeling, sensing and thinking right now? Do you know? Usually, in organizations at this time of year, heads are down, driving to the bitter end. In other cases in the past, the myriad of holiday parties are beginning at this time of year but obviously not this year. If the heads are down, are you clear on what they are doing? Is it sanctioned work, or is it so that they can keep busy? With no parties and connection to one another, how are they feeling?

My challenge to you this week is to reflect – truly reflect – where are your Direct Reports and those underneath them? What are their hopes and dreams, and how can you help them in their achievement? The golden rule of leadership, enshrined as a leadership principle in our Army, is: know your people and promote their welfare.

What do you know, and what do you need to know, and how will you help them cross the finish line as one team in 2020?

I usually suggest you need to be focussed on the Deep Battle, but at this juncture, I suggest you reflect on the Close Battle to win the day and finish the year strong.

Don't forget as well to think through the inevitable let down when nothing really changes on the 1st of January and how will you respond to it.

Positive Thinking

27 November, 2020

I hope this finds you well. I am trying something new with this week's missive – sending it earlier, so it doesn't get lost. Please provide feedback if this does or doesn't work.

In this week's missive, I am following the tradition of the last few weeks of discussing wellness. This week is a personal reflection and a bit of an admission. Strangely, once I had set my sights on this topic, it kept coming back in various conversations I had with clients and our team.

This missive comes from the feedback I received on something I did. We had a meeting to review how October had gone. All in all, it was a very positive month. However, when faced with how well it went, I went on to, “ but, I am not sure about November”, etc. The feedback was, we should celebrate success and not cloud success with what the future might, or might not, have in store. It got me thinking – what does success look like in the time of COVID? Can we really relish the small wins or are we always striving for the bigger ones? Worse still, are we (or me) waiting for the shoe to drop? Just in last week's missive, I was going on about planning for 2021, and here I was not even enjoying the current successes of 2020.

One of our clients has done quite well this year and found themselves in the same boat; too busy driving forward, pushing everyone and not revelling in their success. Now, they are stopping to smell the roses and celebrate achievement. So, I wondered were you caught in the same trap? That insatiable desire for success or never enjoying what you have as you drive forward.

The roots of this are a form of perfectionism—the desire to have it all perfect and exact. Unfortunately, perfectionism is the sure path to unhappiness. It feeds the anxiety and makes us lose sight of the good and what is just enough.

Weeks ago, I wrote about the spheres of control. This is just another example of needing to focus on the spheres where we have full control or even partial control. After all, we are the ones that let in fear and anxiety. It is a choice we make. To end this cycle we need to, as one of the Forrest Team Karen Calder puts it, “guard our thoughts”. If tranquillity is the absence of fear and anxiety, then we need to

steel ourselves to focus on joy. We need to see the glass is half full. Dare I say, maybe even be thankful there is a glass at all.

We need to be vigilant in our thinking. As leaders, it is critical to remember the real influence we have over others. I forgot that when I went on to gnash my teeth over what the next month had in store. It impacted others, and so the spiral began. Again, as we run down to Year-End, I suggest you reflect on for what you are genuinely thankful. The horizon has the excitement of vaccines appearing, but we need to be steadfast in our resolution not to let the vagaries, anxieties and concerns take hold. We owe it to ourselves and our people.

So, take the time to pause and enjoy the incremental improvements and relish the power of continuous improvement. Take it from someone who knows better but sometimes can't help himself.

Workplace Stress

4 December, 2020

Welcome to the weekly missive. The last few weeks have been about mental wellness and this week is no different. This week, I would like to broach the nature of our roles. Specifically this week, and perhaps for the next few, it will be about what we call the covenant between the Manager and the Direct Report.

The covenant transcends the relationship of accountability. In accountability, an Employee is expected to work with full commitment on the work assigned by their Manager in exchange for their paycheque. The covenant is based on trust. That trust is that I (the Employee) will do my all, but expect you (the Manager) will care for me. In weeks gone by, I referred to this as the principle of "know your people and promote their welfare".

This week, the newest member of the Forrest team, Vince Savoia, took our team through the nature of workspace stress and the implications of COVID. He pointed out that COVID is a trauma that our people are suffering from. It was something I knew inherently, but hearing it stated explicitly got me thinking -- if present life is causing a deeply distressing and disturbing experience then what, really, is the role of us as leaders? What are leaders really doing to care for their people through a traumatic time?

Thankfully, I get the sense that there is new compassion in managerial leaders that wasn't there before COVID. But I come back to "what are we doing about it"? Did the mental wellbeing of our people get outsourced to Human Resources or our Employee Assistance Program?

Your people are the critical resource unless robots do all your work. We would be careful not to harm our employees physically, but do we pay attention to not mentally hurting them? We may not be harming them directly, but do we even know if they are hurting inside? COVID is trauma because it has the very real threat to us physically but the reaction to the physical danger has added a mental threat. This is magnified when we work from home with family challenges and in isolation from others.

I am not expecting managers to become experts in trauma counseling, but the onus is on the leader to be aware of, and sympathetic and empathetic to, the realities of their Employee struggles and be able

to adequately provide or refer to resources. That trauma, of course, makes people uncomfortable, but leaders need to be willing to engage in real conversations about emotion and stress in order to be properly supportive.

How to fulfill our covenant role in the face of COVID trauma is what I will be writing about in the next few weeks. If you have it covered, send me a note, and I can drop you off the list. The starting point is how are you dealing with this trauma? It is about being authentic and really assessing where you are. Like two weeks ago, how are you reacting to the stress? No point in being the hero; instead, it is time to assess truthfully. In order to help someone else, you need to be prepared yourself -- like on the airplane, when they tell you to put your mask on first before helping others. Have you and your Managers honestly assessed your own feelings in order to empathize with your Employees?

Coping Mechanisms

11 December, 2020

As promised last week, this week is another missive about mental wellness. By now, you should have received our holiday message from Forrest & Company. (If you haven't got it, please tell me, and I will have it resent - spam filters can be unforgiving). The message for this year was very intentional -- in our holiday message, we sent you a link to the sounds of a forest. Yes, a bit of pun on words but very deliberate.

The rationale for the sound of the forest was to provide you with a small coping mechanism. I firmly believe that this week is one of those weeks where stressors are especially high. We are coming to the end of the year and a usual time of shutdown and preparation for holidays. There is always tension before the holidays because there is much to do in little time. Add to this is the tension of holidays in general, a time where we see mental wellness stretched as we try to deal with domestic issues. Finally, the denouement to all of this is that this is happening in the age of COVID. COVID has increased the physical health stressors as we worry about self and family, and know there is no respite because we can't gather as we usually do. It is, therefore, in my mind, the soup for a very highly stressful time.

Of course, as in the past, I am concerned for you. As a good leader, you will have been caring for others potentially at your own expense. Who is caring for you? In earlier missives, I have suggested you use coping mechanisms, no matter how small, because by doing so you are taking control of your life. Using coping mechanisms shores up your inner thoughts and feelings by giving you back a sense of being in control.

So whether you take the time to listen to the few minutes of forest sounds, or take a walk, do yoga, or just sit with a cup of tea, you are bringing your world back into control and replenishing the energy to take on the challenges of holidays.

Remember as well that a key coping mechanism is our sense of connection. So, take the time to connect with that person you may have lost track of in the maelstrom and reach out. You will find it will help them and, by doing so, will help you.

If you are starting the holidays this weekend, I wish you the very best to you and your family. If not, recharge this weekend for another challenging week to follow.

Christmas Eve

18 December, 2020

I am sending this week's missive early at the risk of clogging your email either amid your holidays or just beforehand. It is Christmas Eve and, at risk of being ethnocentric, I am sending this to you now as a reflection point. Hopefully, you are not focused on your emails but, if you are, here we go.

It is Christmas Eve, and I want to reflect on what the real message is. Regardless of one's belief system in this age of political correctness, this is meant to be a time of hope. It is related to winter solstice; the coming longer days and the reduction of darkness (even if the best of the snows have yet to come).

It is about a new beginning and anticipation. It is about inspiring us to go on to a better world. Inspiration is meant to breathe life into us for the next hundred yards. It is also about us coming together and being one with others and our humanity.

If we ever needed it, it is now. As we struggle to make sense of our current world in the age of COVID, it is a time for hope and, even if we cannot physically connect with others, we can do so in spirit.

So, I hope you are inspired with a new hope for a better time as we gradually come from the darkness of the last months.

I wish you and your family all the season's greetings. It is the season when we are one.

2020 Year in Review

25 December, 2020

Well, here we are at the end of 2020—Happy New Year on this very different New Year’s Eve. Again at the risk of adding more to your over-burgeoning inbox here is the last “Managing the Maelstrom” for 2020.

Well, we did it—an incredible year for all of us. For many, the chaos created confusion and challenges, and for others, it also created great opportunities. Looking back on it, Forrest & Company was in the latter group. While I don’t know what 2021 has in store, I am immensely thankful for all that our team has done to get us through this most challenging year.

At the end of every year, we at Forrest used to send out a tool for reflection. It started as “The Year in Review” and then later became a card. Its role was to help our clients to reflect. So in keeping with the spirit of the year in review, here are the things I will be considering, and I recommend them for you as well.

1. What did you learn in 2020?
 - What were the top three things you learnt about yourself?
 - What were the top three things you learnt about friends and family?
 - What were the top three things you learnt about your work?
 - What are you most proud, and what are you least proud of from 2020?
2. If you had to give 2020 a name, what would it be?
3. What will you do differently in 2021?
 - For yourself?
 - For others?
 - For your work?
4. What is the name that you will give 2021?

Some additional thoughts:

- Who have you lost track of over the last year, and what will you do about it?
- What are the things you meant to but didn’t, and when will you do them in 2021?
- Where were you hoping to go to but didn’t (for obvious reasons) and when will you go there?

And if you want to go deeper:

- What do you NEED in 2021?
- What do you WANT in 2021?

Socrates' view that “an unexamined life is not worth living” is a bit bleak, but the essence of being an Enlightened Leader is taking the time to reflect. All too often in the past, we didn't take that time. Now is the chance to make that time.

I wish you the opportunity to reflect now, and I encourage you to make 2021 a year of reflection. If I may be so bold, feel free to pass this on – we can all use the power of a year in review.

I wish a very Happy New Year to you and your family. Stay safe and help others to be so.