

2025

Managing the Maelstrom

2025 - Missives

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New Year Reflection

3 January, 2025

Welcome to 2025. This is just about the fifth year of Managing the Maelstrom, which started on the eve of the shutdown on 13 March 2020. How far we have come, yet we still don't appear to be out of the maelstrom.

I avoided sending out a missive last week, figuring many would be away from the office and not wanting to add to your headache of a post-vacation inbox. Also, if you remember from the week before, I was orienting everyone to Leader Self-Care as the holidays came upon us. As part of your Leader Self-Care, I hope you had the chance to relax and reflect.

In that spirit, every New Year at Forrest & Company, we encourage our clients to reflect on what the outgoing year meant and project forward on what the New Year will be.

I struggled to define 2024 at the beginning; it took a lot of searching to determine what 2024 would be for me. As with all plans, none survived first contact, so it morphed a bit as events overtook.

I concluded that 2024 was a time to be trans-national in thought and deed. While I had been working on Flourishing as a project through Humanity 2.0 in Rome and The Human Flourishing at Work project at Harvard, those projects had slowed by the end of 2024. New changes were on the world's horizon. Instead of the world coming together, we saw divisive nationalism, ethnicity, and religion come back to the forefront. Lofty ideals seemed to be set aside for the lowest common denominator.

At the end of 2024, some of the trends in business included:

- A focus on productivity which looked beyond performance solely and took into account the measure and cost of doing work
- Confusion over the Return to Office reigned supreme in Human Resources circles as organizations tried to balance business needs with personal preferences
- Further, there was churn and a lack of decision-making as organizations tried to game risk and reduce it as much as possible by postponing decisions

All this, combined with external influences, merely accentuated the impact of the VUCA world. VUCA, coined over two decades ago, reflects the Volatile, Uncertain, Complex, and Ambiguous world we live in.

VUCA was a main characteristic of the COVID era when I first wrote these missives, but it has stayed with us. Its only antidote is good clear thinking but, to do that, one needs to take the time to think, overcome the Tyranny of Do, and reflect.

So, what will 2025 mean to you? What will you reflect on to determine a starting point for your path this coming year in the face of VUCA, business, and national trends?

I would like to leave you with my sixteen-year-old son, Alastair's, thoughts. When asked what 2025 would be, his answer was simple: *consistency*. So, may I offer this to you: be consistent in thinking through the challenges you face in 2025, and you will find the path. Consistency in choosing thinking over action will pay off in the long run.

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Welcome again to 2025, and all the very best to you and your family for the New Year.

Cheers,
Julian

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Working At Level

10 January, 2025

For this week's managing the maelstrom, I am returning to a topic from three years ago as a reminder for myself and others. Several times this week, the topic of **working at level** has arisen.

By working at level, I mean working at the appropriate level for your role and compensation.

Here are some examples of not working at level:

- As a Vice President, doing the work of the Directors
- As a Manager, taking over your employee's work
- As a CEO, diving down into detail several levels down, thinking you are somehow adding value

In accountability work, we often discuss the issue of Employees taking work away from their peers and how damaging that is to trust. By not working at your level, you are taking work away from your Direct Reports, which, too, inhibits trust. If you step in to do the work, you have shown you don't trust your people to do it themselves.

There are many excuses given for not working at the level. Some of the most common include:

- My people have too much work so that I will help out
- I have a set of expertise so that I can do this
- My people can't do this, so I will just do it
- I want my people to see I'm willing to "get my hands dirty"

If you are reading the above and don't see an issue, then allow me to suggest some ways to look at this phenomenon.

In a managerial leadership role, one of our key accountabilities is building a team of increasingly capable Direct Reports. If you do the work, you are not growing your people. You may have found yourself in the conundrum of focusing on the task at the expense of the people. If you are at this point, you are not alone.

That said, I think these are really the reasons:

- I don't have time to plan this work
- It's easier for me to do it than to do my own work
- I don't realize that I am doing it

The last reason is the most common. Often, leaders don't realize it until it is pointed out to them. So, how do you stay at level?

The first step is the awareness that this might be an issue. By dropping down to do the work at the next level, you have compressed your organization, and everyone takes a step down. Vigilance is the key – being aware and realizing the impact not just on those under you, but also on you, because now you have more work on your plate.

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The next step is habit. Create the habit of delegation. As a general rule, delegate anything that is below your level of work. Make it a ritual to use the delegation tool of defining QQTR.

- **Quantity**: how many of something is required
- **Quality**: what is the subjective quality standard for the finished work
- **Time:** when it needs to be completed by
- **Resources**: what resources you give to them to meet the quantity, quality, and in the time required

Making this a continuous habit will go a long way to getting you into a routine. But, you can't have a habit without awareness of the issue.

The final step is engagement. We are all human. We will make mistakes, dip down, take away work, or demonstrate a lack of trust. Engagement is talking with your team, being honest with them and asking them for help to remind you. Far too often, we say it once but then don't revisit it, and our Employees stop telling us. Discuss it frequently and truly enlist their help. If you do that, particularly if your Direct Reports are managers themselves, you have led by example, and they, in turn, will start doing the same. The key to engagement is honesty.

It is hard to capture all the facets of working at level but, hopefully, it has given you food for thought. You will help to create a great place to work for your people and, in turn, lift a burden on yourself. So, perhaps give it a try.

After a tumultuous week, have a great weekend.

Cheers,
Julian

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Delegation

17 January, 2025

Last week's missive received considerable attention. The issue of working at a level resonated. In it, I suggested that one needs to get into the habit of **delegating**. Based on conversations this week, I want to build on that.

Last week, I suggested that one get into the habit of defining QQTR as the method to delegate. Delegating in this way is the foundation of accountability. It encapsulates the essence of a Manager's work.

Delegating with QQTR is done in dialogue with your Direct Report where you define your expectation of:

- The **Quantity** you expect
- The **Quality** standard that you expect
- The **Time** it needs to be delivered by, and,
- The **Resources** available to the Employee to use

It is done in dialogue because it isn't a fire-and-forget message. The employee needs to agree that they commit to and understand the QQTR at the outset and, once they do, you can expect that the work will be delivered to the agreed upon standard of the QQTR.

Now, if circumstances change and it becomes clear (well before the T is up) that the work can be done sooner or will be delayed, then it is up to you as delegator to decide if you will adjust that QQTR. Delegation is your work, so you must be the one only one who can adjust the standard.

Philosophically, this means that all the work you delegate is ultimately yours. You decide whether your Direct Reports can do more or less of something or to a different standard. Once launched, it is your job to monitor and coach to achieve the standard that you expect.

The habit of QQTR can be hard at first. Just this week, in talking with a CEO who uses it, he commented that the definition of Quality is the hardest part of the process. This is because Quality is a subjective expression of what “good” looks like, which is different from Quantity, which is an objective, measurable number.

The intriguing part of QQTR is the Time element. While I agree that Quality is often hard to define, the nature of Time rules everything we do.

Time, in QQTR, is the ultimate constraint for tasks. Sometimes, you have the flexibility to adjust it. But in many cases, the T for time in tasks is adjusted with impunity and without agreement with our managers, thereby ignoring the Time standard. The knock-on effect of one missed timeline can create enormous issues for an organization.

Time is about projecting forward. It is about thinking from “where I am right now” and forecasting into the future. It requires you to make a prediction in a real world of uncertainty. Sometimes, if you are lucky, you can compare it to previous situations or you may already have the deadline imposed on you by *your* manager. When you forecast you are going out on a limb, making a subjective call again.

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This is another reason delegating is done in dialogue, with the Employee taking on the task. *Can they deliver the QQ in that Time with the Resources they have been given?* They will understand what is on their plate and how realistic that framework is. They can also provide Best Advice and both of you can ensure that the expectation is clearly understood.

Remember, once they have agreed to the QQTR, you can expect it to be delivered. After all, every Employee's key accountability is to work with full commitment on the tasks assigned by their Manager.

So, a question for you to ponder is this: if the task you delegate is yours and you have defined the Quantity and adjusted it along the way as needed, then why celebrate success in achieving Quantity at the end of the year in performance reviews? Instead, perhaps you should focus on their effectiveness or how well they worked in reaching the full QQTR.

Again, these are all things to ponder in this wintry January.

Cheers,
Julian

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Bureaucracy

24 January, 2025

There is much talk these days about **bureaucracy**. So, for this week and the next few, I will focus on bureaucracy: what it means, how it occurs, its impact, and how to deal with it.

As I have said many times, words are analogies for thoughts, and “bureaucracy” mostly conjures negative thoughts and emotions. While it originated as a form of political governance, it has subsequently come to represent inefficiency, lack of decision-making, red tape, and duplication. This is the aspect I wish to address.

While it initially had a valid use for non-elected individuals to administer government organizations, the negative side has become a euphemism and catch-all for one of the biggest problems in business.

Many times, we equate bureaucracy with hierarchy. Many organizations feel that the flatter they are, they are less likely to have bureaucratic red tape. While there is some truth to this, hierarchy alone is not the cause of corporate bureaucracy.

So, let's explore the causes. The first is Strategy, or rather, the disconnection of the organization from its Strategy. Strategy is the spirit of the direction for the business, identifying the achievements that will realize its true nature. Strategy defines what the organization is to be and becomes the core criteria that employees utilize to make decisions and drive toward goals.

The disconnection from Strategy creates bureaucracy because when employees aren't sure of what the Strategy is or if it has changed, it leaves them to their own devices. This is where busy work comes into play. As organizations get larger and lose sight of their Strategy, there are more and more cases where employees fill the void with activity.

If managers don't define accountability according to the strategy and do not hold their people accountable, you can expect redundancy and "busy work for busy sake."

The next cause of bureaucracy is more related to hierarchy: too many layers of structure. Organizations are not good at structural discipline. The discipline of structure is that structure must come from Strategy, not the other way around.

Pronouncements of 8 layers, each with eight direct reports, do not help. While they may have worked somewhere, they do not represent what people need to do to deliver the Strategy. The science of structure based on human capability is key. Most businesses based on Stratified Systems Theory and their Strategy require only five levels.

If we have too many layers, we create compression or jam-ups where there is no real work to be done. Again, we make work, endeavouring to add value; we build in the red tape, and, in turn, we create micro-management organizations.

Finally, the last cause of bureaucracy is the talent themselves. Organizations need to carefully ensure the right people are in the right roles. Talent assessments that use generic competencies don't help to ensure you have the right talent in the right roles. The individual must meet the needs of the role and not the other way around.

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Sometimes, when we don't have the right talent, we add employees to make up for the shortfall. The organization then becomes bloated. Instead of coaching and developing, we add more headcount.

In other cases, we choose to turn a blind eye to talent or behaviour issues, move people around, and create non-jobs where we feel they will do less damage. Pretty soon, if not dealt with, they either get shuffled all over the place or end up with a department of similar employees.

In short, bureaucracy starts with disconnection to or no Strategy at all. Without a real Strategy, your structure suffers; without real structure, you end up with the wrong talent.

Next week, I will look at the impact of bureaucracy but, in the intervening week, see if any of the causes reflected above lurk in your organization.

Have a great weekend.

Cheers,
Julian

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Ballooning Structures

31 January, 2025

Last week, I explored the **causes of bureaucracy** and it raised several questions, so, I thought I would continue with a deeper dive into the causes rather than focusing on bureaucracy's impact as promised for this week.

Specifically, this week's missive intends to drill down into the cause of one facet: **organization structure balloons**. A ballooning structure is rife with bureaucracy. Wasted energy and efforts, a system moribund in process, and red tape are all hallmarks of these ballooning structures. Eventually, as more people join the organization, inefficiency grows and, ultimately, that becomes ineffectiveness.

This is important because many organizations face bloated structures and, therefore, incur additional costs without understanding the cause.

The primary cause of ballooning structure is that, as I like to say, "organizations are hoarders." They are hoarders in the sense that they collect work.

This scenario explains how hoarding leads to ballooning: hoarding happens because employees do the work they are used to; there is nothing new with that. Employees will continue to do the work they have always done because it is comforting. However, the employee is also asked to do other things as time passes. Suddenly, there is more work to be done. The employee either gets overwhelmed with more work or new resources are added. You can see how the balloon expands once new resources are added as a solution.

This scenario happens at all levels of organizations. Think of a smorgasbord: You have a plate full of food, but there are more tantalizing things out there, and we add more to the plate. Pretty soon, it is overflowing, and we need a new plate. The problem is that we like what we already have, so we don't want to take any of it off.

The hoarding and smorgasbord are simplistic analogies, but hopefully, they convey the real truth that we do not stop to take stock and remove work that is no longer, if it ever was, necessary.

The roots of the issue of bureaucracy lie in not practicing continuous improvement.

While many organizations have continuous improvement programs to find new ways to do things, improve productivity, and reduce waste, these programs are rarely used for higher-level work.

The essence of this form of continuous improvement is the need to explore and determine what activities are no longer valid. By rejecting some activities, we are not making busy work; we are only doing what is necessary and adds value.

But, to choose what adds value, we must make decisions. Those decisions are based on what is necessary and what is nice to have. To do this, though, we need clarity of Strategy. This brings me back to my point from last week: clarity of Strategy is essential to combat bureaucracy.

In decision-making, we have to be clear that not everything is a priority and that we need to establish the various levels of priority.

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In our experience with organizational thinking, this is one of the areas that people are not good at – choosing one thing and rejecting the others as a priority. Time and again, the lack of priorities, or everything being a priority, is the common refrain of organizations.

The reason for not choosing one priority over another or rejecting this work for other work is that there is risk involved. Risk hangs over every decision, and unexplored risk becomes fear. Fear is a very powerful force. If we don't consider the risks of reducing some activities, cutting out work, or even setting real priorities, we become beholden to fear.

As a result, we hoard our work and add more work. When we do that without assessing whether it is value-added work, we are doing work that is, in effect, "busy work."

That said, it is not up to the employee to decide on the work that adds value; they may have opinions and can advise their manager on such matters, however, the real issue is that management is not practicing continuous improvement. They are not ascertaining if the work is adding value and not making the call about what work should or should not be done.

As you can tell, the roots of bureaucracy are poor management practices. The good part is that they can be solved.

Have a great weekend.

Cheers
Julian

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The Costs of Bureaucracy

7 February, 2025

This week, I am continuing my ongoing series of missives on bureaucracy with a discussion of its impact on organizations. The last two weeks have been about the causes; this week, **we are looking at its cost**.

Bureaucracy is characterized by non-value-added busy work, red tape, micro-management, and ballooning structures, which are its symptoms.

The first impact is it creates inefficiency—in other words, resources are wasted to little, if no, value for the organization. Inefficiency occurs when work is duplicated, double-checked, or held up for scrutiny. The scrutiny, while safeguarding against mistakes, reflects a risk aversion. It reflects a desire to reduce risk to near zero rather than manage it. Attempting to control risk costs energy and stalls initiatives. In doing so, it wastes the energy and efforts of employees. Time gets wasted checking and rechecking the decisions.

Seeking zero risk eliminates the use of judgement and discretion. Effective risk management, however, relies on these very qualities. By stifling judgement and discretion, we disengage employees from their work.

Wasted time and effort are unproductive. We live in an age where “productivity” is a watchword. It is essential for long-term growth and competitiveness. It measures how efficiently an organization produces an output. Governments wring their hands based on the latest productivity statistics. Bureaucracy is the root of productivity issues; it gets in the way of our workforce utilizing time well.

Organizations and nations that struggle with productivity need to look further than the bloating, indecisiveness thrust on their employees. Sometimes, this is a result of internal issues, and in the case of nations, it can be a result of extensive government oversight and regulation, which grinds down employees' efforts.

The corollary to inefficiency is ineffectiveness. If resources are being wasted, it often follows that organizations can't reach their goals. Red tape, designed to control people, gets in the way of delivery. Organizations, as a result, miss their milestones and objectives as time and energy are misused.

Extensive rules and procedures also damage organizational adaptability and resilience – the organization struggles to adapt but is caught up in red tape and rules, which sap its flexibility and energy.

But these examples of inefficiency, ineffectiveness, lack of productivity, and inability to adapt are through the eyes of the organization. The real damage of bureaucracy is its impact on the individual, who then also shows the signs of all of the above.

Fundamentally, bureaucracy stifles engagement. Employees don't value lifeless work where their creativity is on hold. As a result, they find no joy in expending extra effort on the work. They disengage from the work and don't look for ways of continuous improvement if all that will happen is they are kept boxed into process and ritual. Scenes reminiscent of the book *1984* are all that employees have to look forward to. Without efforts of continuous improvement, innovation also stalls.

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When work balloons, as I discussed last week, employees don't have real work. They either have portions of real work for their skill and level, or they end up with "busy work." In time, this, too, disengages them. When this happens, you find they have quit the business but don't actually leave for years… or decades. Or, in other circumstances, those ideal employees leave fast for greener pastures.

Again, this is problematic for the organization, but, when you turn this work environment to the individual level, you will find that that individual employee is unable to flourish. Work becomes a chore, and their lives feel wasted. In these cases, we have created the modern “dark satanic mills”.

There are financial measures for lack of flourishing, but is it all about money? If our employees don't flourish, is that really for the greater good of our communities and our society? When they are not thriving, is your organization really a great place to work? On an ethical level, is it what we want to be remembered for? Yes, it is true – it is the choice of the employee to stay, but, if they are disengaged, is that ideal for your organization?

The age of robber barons should be over. Management needs to look at the workplace they have set up and ask themselves, "*Is this really what we want?*" Far too often, management swallows hard and acknowledges they are bureaucratic but doesn't do anything to arrest the bureaucracy. Time is nigh to deal with it for all the reasons above, but, I would add, most importantly, from an ethical standpoint.

Have a great weekend.

Cheers,
Julian

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Dealing with Bureaucracy

14 February, 2025

This is the last week in my ongoing series of missives on bureaucracy. I wanted to highlight bureaucracy not just because of the work of DOGE in the US but because there is a real sense that, in our struggle as a nation against poor productivity, much of it has to do with bureaucracy.

This series shows that bureaucracy often naturally occurs and flourishes when we are not vigilant. It is a natural facet of human beings at work.

This week, I intend to leave you with three ways to deal with it: **Strategy, Structure, and Talent**.

Bureaucracy often grows when we lose sight of our Strategy. In some cases, many organizations *claim* to have a strategy but, when you peel back the covers and look in, they have a *plan* but are not clear on their intent.

Strategy defines what the organization is to be and becomes the core criteria that employees utilize to make decisions and drive toward goals. A strategy is formed at a high level to envision the spirit of the direction for the organization, identifying the achievements that will realize its true nature. A plan, on the other hand, is an approach to a goal.

If an organization is unclear on its intent, people will do work, erroneously believing they are achieving the aim. If they plan to achieve goals unaligned with Strategy, they waste energy and create non-value-added work.

An organization needs to revisit its Strategy regularly to confirm that circumstances have not changed, requiring a change to the Strategy. Equally importantly, the organization needs to continually re-emphasize the Strategy to show that things have, or have not, changed.

We exist inside our organizations to deliver the Strategy, so we need to be clear about it. As the leader, by highlighting the Strategy regularly, you give people the opportunity to confirm that their work aligns with corporate ambitions.

Structure is a manifestation of Strategy. It is how we organize ourselves to deliver the Strategy. But, too often, Structure is haphazard. It is based on incumbency or what was done in an old business. Sometimes, it is based on comparing to other competitors or similar businesses. In other cases, our Structure is based on financial modelling or constraints. All of these can work, but they do not reflect what Structure needs to do.

Structure must be based on the human component. By this, we need to understand how employees work, and base our Structure on human capability. After all, Structure is how humans will deliver the Strategy. To do this, we have to get very professional about our understanding and use of Structure. There need to be clear principles and criteria based on science, not whim, for the organization's Structure.

But, most important in this, is the clarity for the employees of what they are expected to do to achieve the Strategy. Everyone has a part to play in the Strategy, and we need to be able to clearly link our people to it. Organizations that use this approach find that they lean out their Structure and have much

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more engaged employees because they are clear on what their work is and how it relates to the Strategy.

To remove bureaucracy, we need to ensure we have the right people in the right roles. That means they have to have the capability for the work. This means they need to:

- Have the necessary skills, knowledge, and experience,
- Value the work they are doing,
- Be able to behave reasonably, and,
- Have the cognitive capacity for the work.

As you can see, talent is related directly to the work. Without the Structure and clarity of the work, it makes it hard to assess talent. Far too often, organizations assess their talent against generic competencies, but that is not necessarily the organization's work. As a result, you often end up with the wrong talent in roles.

The final piece of talent to ensure the reduction of bureaucracy is a managerial leadership practice. To ensure your organization avoids the dreaded bureaucracy, your leaders must practice continuous improvement. They need to always look at ways to do the work more efficiently and effectively. To ensure this happens, though, you must hold your leader accountable to practice continuous improvement. This is the core to removing bureaucracy – holding them to account. Managerial leaders must make it part of their daily work, and their managers must ensure they do this.

I hope you have enjoyed this tour of bureaucracy. The tools of increased productivity are all in our hands.

Cheers,
Julian

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Spheres of Control

21 February, 2025

If you are like me, the beginning of 2025 has been bewildering. There was uncertainty at the very beginning certainly but, suddenly, all old norms and beliefs were upended. If you are also like me, it feels really uncomfortable not being in control of what is happening and feeling almost victimized by politicians and political leaders.

This week's topic is **control, anaklesis, and their impacts on our well-being.**

In past missives, I have written about anaklesis. Anaklesis is the very natural human need to lean on things to feel whole. In this context, anaklesis is leaning on our beliefs, experiences and opinions. When something runs counter to our experience, we can feel lost and forlorn as we try to return to what we knew and believed.

Since the beginning of January, it has been a hugely anaclitic time. Norms and standards in Canadian politics have been upended, and, to make matters worse, the very fabric and form of our nation have been threatened by who were thought to be our friends. In the last week, those same expectations of diplomacy, statecraft, and political relationships have been thrown into turmoil, so much so that alliances that have stood for decades have been tossed aside in the space of days.

As all this has happened, I have worked through stages of my anaclitic response. I started first by ignoring the issues; *this, too, shall pass*. Then, the more powerful feeling of betrayal came into play; it was an emotional feeling of disloyalty by politicians and allies. After that, I moved into a space where I did not want to accept the changes happening. Whether it was the romper room of Canadian politics or the messages coming from south of the border, I expected it would all be nonsense, and nothing would change.

The issue is that it hasn't been a progression to a better place. Instead, I have found myself caught in a loop of avoidance, betrayal, and resistance. The real problem with this loop is that it is taking its toll emotionally and intellectually.

So, what do we do about it? Anaklesis represents our lack of power and control, and so, as a result, the issues of feeling towards the changing environment represent our inability to control those things that we rely on.

My epiphany this week was to get back to what I talk to clients about all the time. It is about understanding the nature of control and where and what control you have in circumstances. The control model occurs in three spheres.

The first sphere is the most important; the Sphere of control. I have absolute clarity about what I control, and I am in control of that destiny. Our thoughts and feelings often represent this sphere. With awareness of where my thinking is going, I can control it.

The next sphere is that over which we have only partial control: the Sphere of Influence. In this sphere, my efforts, at best, give me only a 50% chance of being in control. In this sphere, I only have control over

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my own behaviour and responses and may only be able to influence others. The nature of our conversations with others characterizes this.

Finally, the Sphere of Interest is the sphere I have been living in, which has entrapped me through my anaklesis. It is the sphere where I have no control whatsoever. Our interests lead to emotional responses that become unhealthy. I may take an interest and spend time concerned over what is happening, but I have no control over what happens.

So, for me, getting back to understanding this model and focussing on what I have partial control over, where I can influence things, and where I have full control over myself is key.

I started writing these missives almost exactly five years ago because of the maelstrom we found ourselves in during COVID-19. Now we are faced with potentially equally existential threats in an ever-expanding maelstrom. Still, by understanding anaklesis and how it impacts us, and working on expanding our spheres of influence and control, we can improve our lives and enable us to flourish.

Have a great weekend.
Julian

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Stepping Up

28 February, 2025

Many thanks to all who reached out after last week's missive. The idea that we live in unprecedentedly discombobulating times has resonated with many.

I recently spoke to a global HR team about living in the VUCA world, so I am sharing my thoughts and experiences with you this week.

By VUCA, I mean Volatile, Uncertain, Complex, and Ambiguous. The term was coined by the United States Marine Corps commandant in the 1990s. VUCA was intended to explain the upended world that occurred after the fall of the Berlin Wall for the military, who had relied on a formulaic enemy in the form of the Soviet Union.

My point to the group was that, while the principle is the same, we are ten times past that VUCA world. Even five years after COVID shut down society and sent everyone home, we are still seeing the effects.

In previous missives, I wrote about the seething anger we saw after COVID-19. It was like the line from the movie Network: "*I'm mad as hell, and I'm not going to take it anymore!*" In effect, in those days, not so long ago, we were feeling betrayed and confused.

But now it is much different; we live in a very uncertain age. Yes, there was lots of uncertainty in the past, but in a discussion with Jason on the Forrest team today, we discussed whether this is worse than the days of COVID. It think it will be different for all of us.

The issue for me is that it is hard to describe how I am feeling. I mentioned last week that I felt distraught because so much was out of my control. A lot of my disquiet comes from this thinking.

How about others? Where do they stand in all this?

Many are struggling with this issue. What should we do if the Gallup statistic that 78% of employees feel lonely in the workplace is true?

At the end of my presentation, the crowd asked what was necessary to overcome the feeling of VUCA. I had explained the issues and provided a prescription of sorts, but, at that moment, it hit me that one important solution was missing in our world.

It is the demonstration of leadership. We refer to it as Enlightened Leadership. It is about being authentic, digging deep into ourselves and believing our role is for the greater good. It is about being a servant in that we are leading others for their good, not our own desires, and, finally, it is being transformative in changing those "dark satanic mills" into great places to work and be.

VUCA is growing in power and holding sway over us because our leaders are self-absorbed and do not exercise enlightened leadership. For them, authenticity is doing what is good for them, servanthood is making others indentured servants, and transformation is changing people to meet their personal aspirations.

In the darkness, the leader has to step up. I remember days as a young, inexperienced, exhausted, insecure leader, reaching those points where it would be easy just to go away and escape it all. But, for

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me, it was the realization that I had a job to do, a role to perform, and people depended on me. That enabled me to step up. Sure, I made mistakes, and things didn't go according to plan, but I had to push through.

So, in this VUCA x10 world, we need to demand our leaders step up, hold them accountable, and step up ourselves. Leadership is about the greater good, no matter how much we want to focus on ourselves.

If I can add any insight, it would be that this, too, shall pass. Like in those first few weeks five years ago, we were uncertain as the world shut down. Now we have come out the other side.

It will be different this time, but it will pass.

Have a great weekend.

Cheers,
Julian

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Establishing Truth

7 March, 2025

Four and a half years ago, I wrote about the subject of truth. The circumstances then were very different. It was the height of the pandemic, and it was very hard to discern what was true because there were many different opinions. Think back to the days of masks versus no masks, whether the virus was airborne or not, etc. In those days, doctors were media darlings because they must have known something of the facts.

This missive is about the loss of truth and the weaponization of falsity for personal gain.

To set a level on what I mean by truth, we can see the state of truth through this definition.

By truth, I mean objective fact. Many people use this limited definition to express their truth, but what truth *is not* is just as important as what it is.

Truth is universal. By that, I mean it is not an opinion, a belief, or even merely an idea. Truth can be both quantitative and qualitative. At its core, it's meant not to be an interpretation. Just like the notion of quality, it is a truism that is the same for everyone.

The problem is that, nowadays, the definition of truth has changed. It has been co-opted in some cases by a term as well as the intention of personal truth. In other words, it is *my* truth, and I can say it's a truth because I believe it. Or, in some nefarious way, I throw it out as an idea to make you think it is a truth.

Seven or eight years ago, this was known as fake news, a social media phenomenon. It wasn't a universal fact but instead an opinion delivered in such a way as to make you think it was a fact. The proliferation of social media made these untruths pop up everywhere. In fact, every time you "liked" the untruth for whatever reason, the algorithms of social media reinforced it and fed you more points of view that further embedded you into what is tantamount to a lie.

Two weeks ago, I wrote about how uncomfortable I was because I was losing control of my environment. The loss of truth and the proliferation of lies have made it worse. It is hard, if not impossible, to understand what the truth is now.

But it is bigger than that. What is truly disturbing is that politicians, in particular, are brandishing untruths and lies with impunity. There is no one holding them accountable. The media, which used to be the fifth estate, is falling into the trap of choosing sides and not pushing the truth. Instead, they have been co-opted into their editorial self-interest.

Politicians controlling the narrative is a huge issue in our society. They blind their followers with what they want to hear just as social media "likes" do and get away with it. The book *1984* has been referenced heavily in the last few months.

Two weeks ago, I wrote about the three spheres of control. The first is where I have full control, the second is my sphere of influence, which I partially control, and the third is my sphere of interest, which I have no control over. Politicians spouting lies, however angry they may make me, are outside my control

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unless I choose to step up, take them on, and truly hold them accountable. My control is where I choose what I do.

Over the last week, I have spoken to many clients, and many have developed self-preservation techniques like triangulating different sources to ascertain the truth. The value of this is that while I may not be neutral, I can interpret and judge the facts. It allows me to formulate my own opinion. Those who know *1984* will remember that the key to getting closer to the truth is critical thought. We must all use our minds to think through what we see and not kowtow to the opinion of the day. Furthermore, as a democracy, we must hold our politicians accountable for delivering what is important to us.

Regardless, there is an opportunity and an imperative for us to get as close as we can to the truth. Otherwise, opinions and beliefs will wash it away, and our world needs more focus on truisms, not just fly-by-night ideas and incalcitrant beliefs.

We must demand truth and hold people culpable for outright lies. But first and foremost, we must think for ourselves in the current maelstrom to regain control. That is the essence of leader self-care.

Have a great weekend.

Cheers,
Julian

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Five Years Ago

14 March, 2025

This is an anniversary missive. Five years ago, on 13th March, 2020, the world essentially stopped.

If you remember, there was a run-up to the dangers of Covid from early January onwards. Two days before, on 11th March, the World Health Organization declared a Covid 19 pandemic. From there, the dominoes began to fall. On Friday, as the weekend approached, everyone was told to go home and not return anytime soon. We thought it might be a week or two, but it continued. Soon, schools, restaurants, theatres, and hotels were closed. That Friday was the first of the pandemic shutdowns; what started as a week became a month and then longer.

We were glued to our TVs, trying to get the latest news and "be in the know." But we didn't know. We listened to experts, and many popped up overnight to tell us what to do and what not to do.

As time passed, we gradually got into a routine and began living in this new reality. That Friday, the 13th, sparked this missive: *Managing the Maelstrom*, as I tried to find a way to add value to our clients as we faced this existential threat.

Cast your mind back to those days five years ago. Where were you when it happened, how did you feel, and what did you think? What do you remember from that time?

One of my biggest recollections living downtown was how silent the city became. I remember well the discomfort of not knowing what would happen or what was the right thing to do, the fear that came at the prospect of contracting the virus for oneself or one's family, or the interminable line-ups at the grocery store waiting to be allowed to enter and get basic foods.

Remember the rush on toilet paper? The edicts of masks on or off, the social distancing and the never-ending Netflix programming consumed. The anger and disappointment over cancelled plans and the isolation of it all.

The effects of the pandemic at the time were varied:

- There was an increase in anxiety, depression, loneliness
- We learnt how to work from home and how to lead teams online
- We managed to survive through the economic disruptions
- Children struggled to learn on their own and online, and finally
- Our societies became more polarized and fractured

Worse still, there were the lost loved ones, as well as those who, to this day, suffer both physically and emotionally because of the pandemic.

But in the end, we survived. Over time, we adapted to our changing circumstances and got through it all, both the good and the bad. Five years ago, the world seemed incomprehensibly on the verge of destruction. But after it all, we got through it.

Sure, there are vestiges of the effects of COVID-19: staff exhaustion, feelings of listlessness and loneliness, and even the ongoing debate about returning to office.

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It was a maelstrom then, and strangely enough, we find ourselves in a new maelstrom today: a maelstrom of conflicting information, doubt, uncertainty and even anger.

My point this week is to remember the tenacity of the human spirit, to overcome the odds and issues, and to drive to a better place.

So, perhaps this weekend, think back to where you were five years ago and where you are today. It is an opportunity to take stock and see just how far you have come.

Have a great weekend.

Cheers,
Julian

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The Benefits of Flourishing

21 March, 2025

I have devoted the last few weeks' missives to addressing the nature of our society and, in particular, the challenges currently in North America. If you have followed me in the past, however, I have spent a lot of time talking about the nascent concept of **flourishing**, and so this week, I intend to return there.

The definition of “flourishing”, as used by the preeminent international scholar Tyler VanderWeele, is relatively simple: *a state in which all aspects of a person's life are good.*

There is an interesting facet to this definition: by flourishing, we are going beyond the absence of negative to the positive. To use a natural example, when a plant flourishes, it goes beyond mere survival to thriving and growth.

As you can see, this is intimately related to society's current state of upheaval. How do we reach a point where we can burgeon and prosper again?

One place where people can get there is through their work. Flourishing is not just a philosophical construct of academics – it has real value in the workplace. There are three ways to look at flourishing at work and its real value.

The first is the **individual**. If they work in an environment where they can flourish, they are more likely to stay, so retention increases. Furthermore, if they are flourishing where things are good at work, they are likely to be more engaged and use their discretionary energy for the business. Ultimately, they become net promoters of your business and encourage others to join.

The next is for **management**. If employees are thriving at work, they will engage more readily, and downtime or absence will go down. Furthermore, if employees' lives are good at work, the likelihood of internal strife and interpersonal issues will go down. In short, when employees are flourishing, we are likely to see greater performance and productivity, so the needs of management are met.

For the **executive, ownership, and governance**, there is a whole host of benefits. Not only are employees engaged, but management is as well. Notably, the organization is truly renowned as a great place to work, as employee net promoter scores go up. There are also cost savings as health care costs drop and less turnover of employees, to name a few. However, the biggest is the productivity bump that comes from a flourishing organization.

So, there are true tangible benefits to being a flourishing organization. But there is also the intangible, which is the ethical consideration. We are in a tumultuous period of human existence. Our world is in one of its least secure times in history. People are feeling the effects of all this. Loneliness, disconnection, anxiety, and depression are everywhere in our society and reaching a crescendo. Flourishing, and encouraging people to flourish, is the ethical thing to do.

Far too often, people feel like cogs in a wheel with little control of the world and the changes around them. This is about enabling them to grow and return to the driver's seat. Again, in the volatile, uncertain, complex, and ambiguous world we live in, striving to enable our people to flourish is the right thing to do.

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I have purposely kept this week's missive short. Over the next few weeks, I will delve into the realm of flourishing to explore its various facets and how you can get to a point where you can enable your people to flourish.

As we in the northern hemisphere face the prospect of spring coming out of the darkness of winter, now is a great time to focus on things that grow and thrive.

Have a great weekend.
Julian

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Flourishing & Enlightened Leadership

28 March, 2025

As promised last week, I am continuing my exploration of **flourishing**. By flourishing, I mean a state *where all aspects of a person's life are good, or moving in that direction.*

Flourishing will become one of society's next big seismic moves. It has already become a topic in the G20 and is set to be on the agenda for the G7 this year in Alberta. It is the offshoot of the idea of rebooting humanity, which I wrote about several years ago, and it is being studied by academics around the world.

This week, I will explore the notion of **Flourishing at Work**. After all, if a person's work life is not thriving, then all aspects of their lives will not flourish. Specifically, I intend to look at the roots of flourishing at work.

Organizations that endeavour to ensure their employees flourish gain clear advantages, and I wrote about them in last week's missive. The advantages are both economic and non-economic.

When the CEO or the Board sees the advantages, they will undoubtedly want their organization to embrace the idea. They will see the value of being known as a flourishing organization and it will bring an inherent value to the Brand. However, here is where caution is necessary.

Far too many corporate initiatives become about setting up programs and systems, but miss the very human aspect of how this truly comes about. When things that involve human beings become programs or projects and are reduced to a checkmark, they lose life.

Management has to play a role in ensuring employees' prosperity. To ensure this, management must be held accountable for delivering the necessary elements. For flourishing to work, our managers must practice Enlightened Leadership.

In my book, I outlined Enlightened Leadership. It is key to flourishing because it ensures that people prosper. Simplistically, Enlightened Leadership is about realizing that our people's success is our success. From flourishing, we see:

- Engagement
- Attachment
- Retention

Who wouldn't want that?

Authentic, Servant and Transformational Leadership are the elements of Enlightened Leadership that ensure employees prosper.

Authentic Leadership: This is being yourself and having a heightened sense of self-awareness:

- Valuing your employees and their roles
- Having integrity and sticking a belief in flourishing
- Being open with others and willing to hear their needs and points of view

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Servant Leadership: This is being focused on your team's needs and desires because you are accountable for the output and working behaviours of your Direct Reports:

- Key to flourishing is the golden rule of leadership -knowing your people and promoting their welfare
- Encourage their thinking and input
- Fully understand their capability and maintain or enhance their self-esteem always

Transformational Leadership is the foundation of flourishing because it is about creating change where people grow and burgeon.

- Develop the potential of your Direct Reports by removing the impediments
- Inspire a desire in others by example
- Manage the tension between current state and future goals where employees are successful

My caution to you again is that, if you believe your employees need to flourish and you want them to be successful, this is not a program. It is rooted in the sacrosanct relationship between the Manager and the Direct Report. No HR system or initiative will make the change to ensure your employees blossom. It is the accountability of your management.

You need to hold your management accountable to exercise Enlightened Leadership.

I hope you have the chance to prosper and grow this weekend.

Cheers,
Julian

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Letting Go of Control

4 April, 2025

Here we are, once again, in another week of VUCA. It's been a steady state for the last few months, and continues to be a volatile, uncertain, complex, and ultimately ambiguous world.

If you have followed my topics over the last few weeks, I have brought us back to the idea of **flourishing**. However, it has become increasingly difficult for people to flourish in this week's VUCA world.

Massive swings and changes in direction, uncertainty about what will happen, the complexity of feeling like we are living in a 3D chess game, and the inexactness of multiple interpretations of events have buffeted society and our world.

I was at a loss as I planned for this week's missive. While I wanted to get back to discussing flourishing, I found that the external world was seeping into my thoughts and impacting how I saw it.

Figuring out where to turn has been hard in this crazy time. In all this, how can one prosper? How can one live one's best life?

I am not really asking this question rhetorically – *how can we, as a society, flourish in the face of this?*

I can't innumerate all the facets and changes people have struggled through in this state. We all have different needs, beliefs, experiences and ideas.

Often, I feel I have to have a set of lessons and answers, but with each of us being different, please bear with me as I try to explore my own ways and means to deal with it.

In past missives, I have used the concept of the three spheres of control. After all, the issue with the VUCA world is that we are not in control of the changes. This, combined with not having a solid footing or a place to stand, makes it difficult to deal with these issues.

To revisit – in the centre of the three spheres is the sphere of full control, which is the world that I have control over and is specific to me. In the work world, this is the sphere where I know what is expected of me, I have access to the tools to enable me to do the work, and I have clear guidelines of expectation. If we could all get this in our work, this would be a major step towards flourishing.

The next sphere is the one where I can influence, and that is where I have only partial control. It is important; if you want to gain more control, it is a matter of expanding this circle. It gets expanded by building a network and engaging with others. In these trying times, taking time to connect with others is good for both us and others. However, an important thing to remember is that it isn't just about the quantity of engagement with others; the quality and nature of the connections are key. It isn't about being the dragonfly flitting from one to another but truly being present and engaging with others.

Perhaps the most relevant sphere right now is that of interest. It is the sphere where I have no control whatsoever. It's the one that upsets me the most. In VUCA, things happen to me, and I have no say. In this case, we need to do two things:

- Make the sphere small by focusing on what we can either fully control or partially control

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- Step away from those things that we can't control and truly let go

Letting go is the key. If you are a type A personality or you are used to being in control, this is the hardest thing to do.

There is a paradox here – to flourish, you must let go yet, simultaneously, you are concerned about not being in control. It is a challenge. The more I want to flourish, the more I must let go of the control.

I am not sure if I have helped you prosper. However, with this approach, you can begin to hold back VUCA's encroachment, which should, in turn, help you flourish.

My final thoughts this week are that if any of this resonates, perhaps think about how you may be able to use it to help others, and in doing so, you will begin to expand your sphere of influence.

Cheers,
Julian

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The Skill of Decision Making

11 April, 2025

This week, I am changing direction to an issue that I see many organizations and people struggle with. **Decision-making** is a critical human skill, and it is learnable.

We find that people and organizations struggle with decisions. When they struggle, they introduce stress into their lives, but our lives require us to make decisions every day so how do we alleviate that stress? Some of these decisions are rote and done without much thought, but then there are others that require great thought.

First, what is a decision?

I often ask this question in group sessions, and there is no common theme or definition. The most common is the idea that a decision is a choice. While this is true, it presents it in an almost binary selection. While this can also be true, it makes decision-making stilted.

The definition I like to use is from my mentor Jerry Rhodes, who defines it as "*choosing one thing and rejecting all others*". Herein lies the roots of the decision-making challenge – it isn't just a choice. It is about rejecting the other choices, and this is where the realm of risk enters. As I also like to say, "*unexplored risk becomes fear*", so if there is a risk in rejecting our options, fear enters and stifles our thinking.

One reason we don't make decisions is the nature of risk: *What if I get it wrong?* It is much easier to gather data or brainstorm ideas than to make a choice. So, we try not to make the choice until we have to. But we can't live our lives like that.

All work involves the exercise of judgement and discretion. We have to make calls, and the more senior you are, the more complex those calls become. However, there is a paradox: the more you can use your judgement and discretion, the more engaged you are in your work, but if you are concerned about your decision-making ability, then your work may not be that engaging for you.

In our experience, there are three reasons why people don't make decisions in the workplace:

1. They don't have a framework for their decisions. People aren't taught a cognitive framework for decision-making. Our parents teach us right from wrong, but that isn't a framework, and neither is learning by mistakes. A framework is a supporting structure that gives form to our thoughts. So, if we don't have a framework, are we confident in our thinking process? People make decisions based on their natural thinking style and hope for the best. That framework must address risk assessment.
2. If we don't have a framework, how can we share our thinking with others? I have often had managers tell me, *"I don't trust other's thinking because they can't explain it."* Go back to math class in Grade 11. You didn't get the full marks just for the answer; you got the marks for showing your work. We live in a society where we want the proof. Ironically, in profiling thousands of leaders in organizations, we have yet to find people with exactly the same profile. This means we see the same thing but all process it differently. If you have a framework, you can show your work and gain the trust and confidence of peers and bosses.

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3. Finally, there is an operational aspect to why we don't make organizational decisions. We have found that, in many organizations, it is unclear whose decision it is to make in the first place. This looks like interminable meetings or a slowness in getting on with things. Even if a decision is made, it often gets reopened. This is especially true if there is no framework because everyone has an opinion and wishes to reduce risk.

Over the years, I have been surprised by the number of times I have resorted to teaching a framework for decision-making. I assumed that, since these people were successful, they must have this all sorted out. Alas, I was wrong. Furthermore, cases of lack of role clarity are replete in organizations everywhere, and defining who has the authority to make the decision is stymieing organizational success.

Decision-making is about action and execution, and organizations that don't spend time ensuring they have a framework, or that it is clear who has the hammer for decisions, are wasting time and resources.

If you doubt me, ask some people how they make decisions next week, and you will find out that they likely don't have a framework.

Have a great weekend,
Cheers,
Julian

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Time to Rejuvenate

17 April, 2025

Given this long weekend, I am going to take a hiatus from lofty things this week. Next week, I will return with more details on decision-making.

I wanted to share this week the need for rejuvenation. A long weekend usually involves reconnection with friends and family. What we know about human beings is that connection is important. It is even more important when one is under stress and pressure.

This weekend, regardless of religion, represents renewal and rebirth as we begin to enter spring, so I suggest you use this as an opportunity to recuperate. At the same time, connect with others who are meaningful to you to increase your resilience.

The storms will continue around us even on the weekend, but with respite, you will be more ready for the weeks ahead.

All the very best to you and your family,

Have a great weekend,
Cheers,
Julian

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A Framework for Risk

25 April, 2025

Welcome back after a brief respite. Hopefully, you were able to get some rest over the long weekend.

I am returning this week to decision-making as a topic because I feel we are not great at it and, at least for Canadians, a decision will need to be made in the federal election on Monday.

Two weeks ago, I argued the need for a cognitive framework for decision-making. I want to dive deeper into an area I touched upon then.

The topic of **risk** is fascinating to me. As I argued weeks ago, it hangs like a cloud over every decision that we make. Yet, once again, people are not good at dealing with risk. For one reason, no one teaches you about risk at school (unless you are an engineer), so we once again don't have a cognitive framework for it.

Without a framework, we allow risk to float about inside us and we harbour it. We shelter it and allow it to seize us.

We inadvertently harbour the "feeling" of the possibility that something bad will happen. Risk is essentially a negative or undesirable consequence of an action. Like Newton's 3rd law – every action has an equal opposite reaction – risk is the opposite side of every decision you make.

We harbour it because we let it sit and seldom explore it. As I said two weeks ago, any unexplored risk becomes fear. It remains inside of us because we have not cognitively explored it.

Risk is an emotional event. For some, the fear becomes so great that it seizes decision-making. If it stays only in the emotional realm, we can only deal with it through another emotion: courage.

There is another path to dealing with fear and, ultimately, risk, and that is by using our minds and approaching the risk through a cognitive framework. It means taking it from inside our "gut" and thinking through the risks.

The first stage of thinking is asking, "*What is the worst that can happen here?*" In decision-making, it is about asking, "*What is the worst thing that can happen if I choose this path?*" This requires you to use your imagination, but the key is to be able to give form to the amorphous fear.

The next stage involves assessment. It is about assessing the likelihood, probability, and odds of that worst thing coming true. I always have to do this when I hear on the news about the distressing stuff happening around the world: "*What is the likelihood of that happening to me?*" I would likely never leave my home if I didn't do this.

The final stage is to assess the severity, danger, and gravity of that bad thing happening.

Some things will be very likely but not severe, and others will be very severe but not likely. This is now where we have to discern what choice to make. Decisions are choosing one thing and rejecting all others. Assessing the risk, taking it out of the emotional space and into a realm where it can be thought through, helps us make that choice.

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The exercise of assessing risk involves making a prediction. In some cases, this prediction can be counted but, in most cases, it must be judged. The prediction is a judgement call about the future. However, having a framework helps in making the choice.

A final thought on risk is that it is the role of a managerial leader to manage it. Everything has a downside, and the job of the leader is to identify, assess, and reduce threats. There is risk in everything we do, and getting good at dealing with it through a framework can help your decision-making immensely.

Monday, you can practice risk assessment when going to the polls. First, assess the worst thing that can happen with each candidate or party and the probability and severity of that happening. Make sure you don't shirk either severity or probability because, as we have seen, much of the social media and media rhetoric has presented worst cases. Now you can decide for yourself.

Good luck in your choices.

Cheers,
Julian

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Thinking Through Risk

2 May, 2025

Welcome to May, halfway between spring and summer. I thought this week I would explore the topic of **risk** more fully. The last two weeks were risk in making decisions and I am going to continue looking at risk at the tactical level – how we deal with risk at the decision level even if those decisions may be strategic in nature.

As I've said, risk is in every decision we make, from the simple to the complex. Furthermore, unexplored risk becomes fear. That fear stifles creativity, leads to analysis paralysis, or furtive decisions made at the last minute. Those last-minute decisions themselves become risky because they have come together without considered thought.

I did a household check on how family members saw risk and they came back with:

- Failure
- Scary
- Unknown
- No safety net
- Dangerous

Exploring risk is about thinking it through fully because in decision making there is always a threat.

The traditional definition of risk as I gave it last week was through the lens of exposure to dangers. This is where risks are a threat and so, in the process of choosing one thing and rejecting all others (decision making), risk figures highly. But, as pointed out by one of Forrest's risk experts Rob Quail, risk is really about uncertainty. Uncertainty is that cloud that hangs over the actions we take.

Human nature is to awfulize and catastrophize. That, then, becomes an emotional event – just look at the descriptors above. So, we start the exploration of risk to reduce the emotional event. To control the emotion in making choices we need to understand what might go wrong, assess the likelihood, and consider impact. But, the process does not stop there.

While the first step of identifying the real risks and then making an assessment so as to be able to approach it rationally is valuable, there is more valuable thinking work yet to be done. We need to explore more and think it through.

If we take the uncertainty definition, we need to understand how we can better control the uncertainty. So, how might we control the identified risk?

We often believe we can't change the negative event upending our chosen solution, but can we? An exploration of the worst cases will determine how we may be able to intervene and not be a victim of circumstance. A key skill here is to be creative to challenge yourself and ask "*are we sure we can't change the path of events?*"

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Even if we can't change the track of history, all is not lost. We need to explore what else we can do about it: this is where we begin to regain control by exploring what can we do to reduce the effects of the event.

If we have made our choice, there is tremendous value to thinking through how we can protect our choice as best as possible. The protection comes from thinking through and planning how to mitigate the likelihood of the bad thing happening and how to reduce the severity of the event it if it does.

We are back to power of cognitive thinking. A plan is all about identifying the goal and thinking backwards how to get there. In protecting your decision, you are thinking rearward about how to reduce effects.

Control comes through thinking. Much of that thinking is cognitive but, when you assess things, you will have to make a call by using your feelings, senses, and intuition to help you.

My experience has taught me that we don't spend nearly enough time thinking, that instead we react. If you think things through you reduce the risk of bad things happening, reduce uncertainty, and ultimately better control chance.

Cheers, and have a great weekend.
Julian

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A Final Thought on Decision-Making

9 May, 2025

This is the final installment of the decision-making series for the weekly missives. While I have been on this topic for several weeks, there has been little uptake and response. That could be because of the time of year (spring) or the topic. I'd welcome your insights on that.

Decision-making is not a sexy topic. Sometimes, when I explain it to clients, they smile and nod, and I get the sense that they are just waiting for me to stop talking. After all, we can't go through our day without making decisions. We do it autonomously, so why make a fuss about it?

It is true that we make decisions all the time. However, do we make the *right* decisions? Can we replicate the successful ones? What do others think about the results of our decisions? Would we make the same choice? If not, why not?

To be clear, I am not talking about decisions about what colour socks to wear. I am referring to business decisions that have real-time risks attached to them. These are the choices that, if wrong, could cost jobs or impact our organizations down the road.

As I have said, the real issue for organizations is that they don't have a framework for their decisions. It is a huge issue for teams. If we have no framework, we find the following things happen:

- Decisions get revisited
- Decisions get pushed up to avoid culpability
- People are either openly challenged for the choices they make, or it becomes a passive-aggressive subterfuge
- We lack trust in others because we would have made a different choice

In the end, our team cohesion starts to falter. In addition to these tensions and challenges, we soon see a fraying in the team. Issues become "interpersonal", and we get to a point of acrimony.

The real culprit is that we see the same things but don't have a common process for solving problems.

Our decision "frameworks" are usually just constraints on our decision-making, like the limit of $X00,000 without approval.

A framework is a replicable approach to examining the matter to be decided upon. It is designed to help us choose one thing and reject all others. It gives us the same model to explore the topic, but instead of arguing how we got there, we have a process, and our discussions are about the data we are using, not the process design.

Here is what we recommend as the framework:

- Purpose – what are we truly trying to solve here? What is the goal of the decision?
- Criteria—What criteria will we use to achieve the purpose? What do we need, and what do we want?
- Options – what new possibilities might meet the purpose and criteria?

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- 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?

While these look like step-by-step processes, the point is that you may need to recycle through any of the steps, so you need to be flexible, as one step may inform others.

All this discussion of frameworks is incomplete without the realization that you need to confer authority on people to make decisions.

By using this, you can avoid the unpleasantness above. But more so, you increase:

- Effectiveness
- Efficiency
- Trust and
- Adaptability

To be clear, this is the process for making any major decision that requires options or when faced with many options. It takes work to get good at it, but in the long run, it is worth it.

If you have any questions, please feel free to reach out. Have a great weekend.
Cheers,
Julian

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The Nature of Rest

16 May, 2025

It is the Friday before the official arrival of spring in Canada, and it is an opportunity for new growth and life.

Now is an excellent time to talk about the **nature of rest**. In the past months, as I have mentioned, we have seen more and more employees in organizations feeling overwhelmed, burnt out, and generally stressed. This is not surprising; we have seen a lot of volatility, uncertainty, complexity, and ambiguity around every corner.

In previous posts, I mentioned the need to take care of yourself, and this is a good time to reiterate. As the leader, you cannot afford to go down as a stress casualty and so, with the prospect of a long weekend, 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 extreme 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. Cast your mind back as an example – 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, engaging in mindless activities, or even the chance to consciously sit and think/meditate
- Connecting with others: as a social species, we need to connect to other humans
- Taking action on things rather than letting the lists build-up
- Basic self-hygiene like eating correctly, and working out
- Managing your time so that you aren't rushing from meeting to meeting

Thinking Mechanisms:

- Build your self-esteem by bolstering yourself and 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 broader humanity and care for the world

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So, with the prospect of holidays, take the time now. Logic would dictate that you have spent much energy getting here, but the marathon is not over. You must be in the best shape possible to fight that next fight.

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

Welcome to Spring and have a great long weekend.

Cheers,
Julian

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Understanding Strategy

23 May, 2025

I had a variety of topics for this week's missive, but settled on one that kept coming up repeatedly in discussions with clients: **Strategy**. While I have written about it in the past, I intend to take a different tack today.

Strategy is an often-used but misunderstood word. People like to use it to describe roles or their work. Organizations throw it around, but again, they often misunderstand it. “Strategy” is conflated with “planning”. Sometimes, it is used as a $5 word for plan because, after all, PLAN is a pedestrian four-letter word. It is much more chic to use Strategy.

The first issue of Strategy is intent. I often ask CEOs if they have a strategy, and they say, "Yes, of course," only to find out later that they have been planning but don't have clarity in Strategy. It becomes clearer when you ask the employees further down; they often don't feel there is a strategy or that it has somehow changed. Therefore, it is necessary to get to definition.

In Strategy, my intent is to envision the spirit of the direction for the entity, while identifying the achievements that will realize its true nature. Strategy defines what the entity is to be and becomes the core criteria that is used to make decisions and drive towards goals.

Strategy is essential to any endeavour, whether it be a national government, a corporation, or a not-for-profit entity, a team, or even an individual's life.

It is different from “Strategic Planning” which, at a high level, translates a decision made in Strategy into a series of related actions over time that mobilize organizational energy around events, organize resources, and reduce uncertainty despite unknowable changes.

The thinking process involved in choosing a Strategy differs greatly from developing a plan.

Strategy is about making a choice and setting aside other possibilities for the one you want and need to bet on. It involves risk. *If I travel down this path - what if I get it wrong?*

The reason we often do not have a Strategy stems from a lack of understanding of its importance and role, as well as the fear factors above.

It is also because of the "Tyranny of Do." The Tyranny of Do is that innate predilection to action. Organizations place more value on *doing* than *thinking*, and for individuals themselves, some prehistoric holdback may drive us to act rather than contemplate.

To be clear, the process of Strategy is valid for the organization, the team, and the individual.

It is important for the individual to have a sense of self and purpose. Purpose is a critical element of Strategy. Why we are here is an important thing to consider in one's life. The same is true for our vision, our mission, what makes us different, and, of course, what we value. Far too often, we move through our lives without considering these important facets.

For the team, it is important to know the end state we are hoping to achieve, our role, and what is important along the way.

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Finally, the organization needs it to align the organization. Without clarity, it is hard to align the efforts of many to thousands of employees. Corporate Strategy needs to explore:

- Vision
- Mission
- Purpose
- Unique, sustainable competitive advantage
- Strategic drivers
- Goals and objectives
- Lines of operation to achieve the goals, and,
- Structure and organizational spine

These are all the way-stations that need to be visited in the journey to define Strategy.

However, again, far too often, we don't take the time to explore these as we are overwhelmed by the Tyranny of Do. We need to articulate a choice for our organization, teams, and ourselves around a cohesive position and definition of our intent.

I can often get people to the point of realising the need to articulate Strategy, but they frequently don't take the necessary steps to actually do it. All I can ask is that if this has given you any desire to clarify Strategy, you take the time.

After all, sometimes, we don't get a second chance for things in life.

Have a great weekend.

Cheers,
Julian

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Personal Strategy

30 May, 2025

This week, I will continue my exploration of **Strategy**. Last week, I endeavoured to set out its meaning and the elements of Strategy, but this week I intend to delve deeper into its meaning and role.

I still get the sense that the meaning of "Strategy" is not clear. For many, it is simply something we do. It becomes a check in the box – it is done or not done, almost like the parsley on your plate; it has no meaning, but it is expected to be there.

Nothing could be further from the truth. Strategy is the essence of every endeavour that we are involved in.

Strategy is the end state of what you want to be. It is not a process to get somewhere. Plans are the process. No matter how big, plans are the activities over time which leads to achieving the Strategy.

As children, we set our dreams on what we want to be when we grow up. Yet what happens is that, over time, we lose sight of those wants. We reject the "childlike" aspirations of the reality of our world. The "real world" gets in the way, and we lose our sense of dreaming and imagination in favour of pragmatic reality.

Real Strategy is about exploring the reality of our dreams and establishing what our end state is and what is important to us. This is about exploring our world, not through naivety, but through the lens of the reality of what we want to be.

At the individual level, it is about choosing what is important to us and where we want to go and, as such, it means diving deep into reflection of:

- What is my Vision for myself?
- What is my Mission? What am I really?
- What is my Purpose? Why do I exist?
- What do I Value? What is truly important to me?

These questions are the essential questions of life. Yet, we avoid exploring them, instead choosing to move directly to action, which makes us feel like we are accomplishing things, yet what we are doing is merely wasting our potential.

There is a simple way to look at Strategy, and that is to understand and explore the fact that we may have only one life to live, so how do we live it to its fullest?

This is a profound realization that in our "tyranny of do" lives we lose complete sight of strategy. In a sense, we can go through life unclear of who we are and what we want to be. However, if we can explore and determine the essence of our true self, we can truly live.

This is a deep exploration of Strategy from the individual level. However, if you understand that Strategy's intent is to define who you are and where you are trying to go, you can see its application beyond the self. Its application to groups and, ultimately, to organizations is about making the choice of who they are and what they want to be.

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My experience has been that we often fail to do this for our organizations, our teams, and ourselves, and we miss incredible opportunities for clarity and direction.

Have a great weekend.

Cheers,
Julian

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A Final Word on Strategy

6 June, 2025

This week is the last missive in my review of the **nature of Strategy**. As you have probably noticed, I have views. Some of these concepts stem from my military background, where Strategy is the realm of the national direction, then, it is up to the military to develop plans to achieve that Strategy.

I have endeavoured over the last few weeks to position Strategy as the definition of what we want to achieve. Planning, such as Campaign or Operational planning, is how to accomplish that. This week is all about why Strategy doesn't get delivered.

In the corporate world, there is considerable confusion over the term "strategy" as there are many different definitions of what Strategy is about. Understanding someone's mental model of the word “Strategy” is important, and we need to understand what people mean when they say it. Do they mean a high-level plan? Do they mean a definition of what the entity is to be which then becomes the core criteria used to make decisions and drive towards goals? The last few week's missives have been about the latter.

Strategy is essential to any entity, and last week, I explored its role for the individual. The week we return to the organizational issues of Strategy.

One such issue is that organizations often go to great lengths to determine their Strategy, and then, once completed, forget about it. Too many times, the elements of a strategy become posters on a wall and nothing more. Organizations are notorious for articulating Strategy and then leaving it as a placemat.

The posters I often see are Vision statements, Purpose articulations, or even a nice description of the Values we hold dear, but then they remain there, lifeless and hanging.

The point of thinking and articulating a Strategy is to take action. It is to move from words to actions. But too often, the move from intention to execution falls into a gap.

Often, the chasm between words and actions is a natural one, as it is often easier for people to fall back into their old ways of doing things. The greater the distance from where we are now to where we want to be, the more likely it is for stasis to set in, as it becomes easier for those implementing to stall, retreat, or wait and see.

Some blame this on the organization's culture, but three interrelated issues cause the chasm:

1. **We don't know how to organize around our Strategy.** A key part of Strategy is structure. Structure is how we manifest our Strategy. By structure, I mean clarifying and defining what work our employees must do to deliver the Strategy.
2. **We lack the discipline to follow it through.** Organizations often fall victim to the shiny object syndrome or latest burning platform and quickly lose focus on their Strategy. We can quickly and inadvertently turn our direction elsewhere. The hallmark of this is when employees start thinking and questioning if the Strategy has changed.

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3. **We lose our confidence.** As we start to work towards our Strategy, things may not go as simply as we thought. It is exacerbated when we encounter rough waters. We begin to question our decisions and wonder if we got the right Strategy in the first place.

So, while we can believe that “culture eats Strategy for breakfast”, it goes beyond culture.

Strategy stalls when our leaders don't drive it – when our leaders fail to understand the interrelationship between Strategy and structure, they don't add urgency and discipline, and we lose confidence in the real need for leadership. As a result, our Strategy falters.

As you may have noticed over the last few missives, the final issue is that we don't understand the value and importance of good strategy articulation.

All of these issues fall at the feet of managerial leaders. Our executives need to take the time to articulate the Strategy. Our senior management needs to develop operational plans to achieve the Strategy, and our middle management needs to enable our frontline managers to execute. In effect, structure and accountability are key to delivering our Strategy.

As an axiom, all employees exist to fulfill the organization's Strategy; they need clarity on the Strategy and what is expected of them to deliver it, and they need to be held accountable for providing it. That is how your Strategy goes from thought to action.

Have a great weekend,

Cheers,
Julian

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Back to Basics: Accountability vs Responsibility

13 June, 2025

Every week, when I plan for this missive, I often focus on the discussions I have had with clients. This week, while not a new topic, presents a new take on the issue of **accountability and responsibility.**

At Forrest, we go to great lengths of time to delineate between these two words, yet we find that, even as we distinguish them, people will conflate the two. Here are what I think are the reasons that people struggle to distinguish them:

- In many cases, they don't value a distinction
- In some cases, they cannot conceive of a different way to look at the two words
- Ultimately, they fail to grasp the distinction.

Here is how we make the distinction:

- Responsibility is a subjective, intangible personal feeling of obligation to act or to do something.
- Accountability is an objective, tangible, and defined requirement to act or do something, defined externally by a manager with a direct report.

The premise of a sense of responsibility is that it originates from within the individual and is typically a combination of values, ethics, beliefs, and experiences. As such, it varies across individuals and over time. For example, today, I may feel more responsible for acting than I did yesterday. One individual may feel responsible for doing something versus someone else. By its nature, it is very personal, and because everyone is different, there is no real sense of universal responsibility.

Accountability, however, is driven by Strategy; a manager defines it as the ways and means to deliver Strategy and, as such, has an innate requirement for definition relative to the work that is required to deliver an output of some form. It is a delegation of work from a manager to their direct report and then holding them accountable for the output. It clarifies expectations in exchange for the paycheque. Given its direct relation to Strategy, it must be defined in relation to others within the organization.

So, what is the importance of the distinction? Far too often, the direction of an organization is left to the responsibility of the employees. We hope to hire well, and if we find that someone is not engaged in the work, we will terminate their employment. As such, we are leaving it to luck or fate to deliver the organization's Strategy. Additionally, many of the issues that occur in organizations are a result of unfettered responsibility, where employees overstep and, as white knights, solve issues while stepping on others' feet in the process. In other cases, those who lack the same internal drive as others become pariahs and are either shuffled to places to live out their sentence or disparaged to the point that they either leave or are fired.

On the other hand, if we have accountability, people are clear on their expectations. They know how they are supposed to work, they know who they can go to get service or support in their work, and they understand the guidelines and extent of their authority to engage with others.

Far too often, interpersonal issues in organizations are a result of rampant responsibility. If I have a strong sense of responsibility, I feel obliged to question the work of others. After all, I would do it differently. I need to lean into decisions made by others and question everything. While these may be

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extremes, they are observed across organizations where employees drive the work while their managers remain in their offices and work through spreadsheets.

Accountability is all about managerial leadership. It is the process that management must use to align the organization.

A final word on accountability: it requires consequence. If there is no consequence, either positive or negative, it is just defining a role and then relying on someone's sense of responsibility to deliver. The act of holding someone to account is the key difference. It requires the leader to apply effective consequences for a job well done and opportunities to define areas for improvement.

A phrase I often hear is *"we are going to hold each other accountable*". While I appreciate the sentiment, it is not really holding accountable as you cannot apply true consequence to a peer. In effect, we are asking people to engage their sense of responsibility and screw up their courage to call out their peers.

Perhaps in the future, I will write about this piece and the nature of honest and open dialogue in a team but, for now, I leave you with this: if a manager tells their team to "hold each other accountable", they are abrogating their role and accountability for the team's output and working behaviours. In effect, they are asking the team to do the manager's work and potentially setting up an environment where people are unsafe psychologically and socially.

I hope this week has given you more insight into the nature of accountability and responsibility. Have a great weekend.

Cheers,
Julian

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Back to Basics: Authority

20 June, 2025

Last week, I revisited the delineation of accountability and responsibility. This week, I am delving deeper into the realm, specifically the area that has the most applicability to accountability and, indeed, every employee. This week is about **authority**.

The clarity of authority is a critical aspect for organizations. It is a force multiplier and enhances productivity and performance. While this may be self-evident, organizations rarely take the time to clarify authorities.

For clarity, by "authority", I mean legitimate(d) power. An authority is something bestowed upon a role to enable it to function effectively. Ironically, authority can only be granted by someone or some role that, in turn, has the authority to do the assigning. If a role lacks clarity of authority, then the incumbent has two choices: one, they can withdraw and do a minimal amount of work, or, two, they can endeavour to seize authority for themselves.

In organizations driven by responsibility, we often see the latter where, in a well-meaning effort to be successful in their role, employees endeavour to exercise power over others. An example is the officious administrative clerk who tells everyone, including the CEO, what they can or cannot do. This authority is not given but rather taken up.

In organizations run by responsibility, it is natural for people to want to exercise control. Many do it for very lofty reasons, primarily for the greater good, while others (a smaller percentage) do it out of power grabbing. Authority has basic human needs tied to it as well, and it is another reason that people seek to seize it. They are endeavouring to control their realm – a common human need.

Authority is essential for accountability to work. In accountability, the manager defines the work and expectations to establish the power the individual has in their role. If the manager doesn't define the work, the resources, or the power the role has to exercise, then it is fundamentally unfair to that individual.

A rule of authority is that it must be commensurate with the role and, as I discussed last week, the role emanates from the Strategy. This provides a logical rationale and ensures that the power is appropriate for the task at hand rather than being subjectively based on the incumbent of the role.

Another rule of authority is that the manager doesn't just restrict it to the direct report relationship. Yes, authority does extend vertically but, even more important for organizations, is understanding that it needs to expand horizontally as well. Horizontal authority is where one role has authority over another in the performance of their accountabilities.

For example, if role 1 needs to obtain information, know-how, or insight from role 2, then this must be an agreed-upon authority. In turn, the manager of role 1 ensures that role 1 requests the support, and the manager of role 2 ensures that the support is provided. That is the nature of accountability.

In the case of the administrative clerk above, once assigned, they now have legitimate power over the CEO, as it is truly derived from their objective work.

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Now, returning to my earlier comment that authority is a force multiplier, organizations sow the seeds of trust through clarity of expectation and accountability. As role 1, I don't have to badger role 2, and as role 2, I don't need to hide from role 1 because it is a clear part of my work to support them.

While this can look like a lot of work, it is the essential work of managerial leaders. Their role is to enable their employees to execute, and defining authority is critical to the core accountability of every manager for the output and working behaviour of their direct reports.

Over the weekend, ask yourself, am I clear on my authority and are my peers clear on my authority? After all, it all starts with us.

Have a great first weekend of summer (for the northern hemisphere) and a great first weekend of winter (for the southern hemisphere)

Cheers,
Julian

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Celebrating Diversity

27 June, 2025

This week's missive is short and in honour of the two upcoming national holidays: Canada Day and Independence Day.

It is not so much a study of the two nations but rather an examination of the implications of **culture**. In North America, there are three distinct cultures based on national boundaries. However, within these are a multitude of other cultures.

Culture, as defined by Oxford, is the *customs, arts, social institutions, and achievements of a particular nation, people, or other social group.*

This week, it would be beneficial to explore the nature of cultures within organizations. In my experience, organizations often overlook the implications of national culture in their day-to-day work. We often make assumptions that others think, behave, and believe the same things we do, but this is not really the case.

I have found that Canadian companies with American branches often overlook the fact that those branches are distinct, and the same is true for American firms with Canadian branches. In some cases, this can resemble the tension between the head office and the field; however, in this case, it is fueled by the passion of nationalism.

The reality is we are all different. The foundations of the Diversity, Equity and Inclusion movement were to recognize that we are different and that difference is a strength. However, I believe it soon became an effort to enforce inclusion and equity. The original need for understanding distinctiveness remains, and it is just as valid. The essence of DEI is to relish that everyone is different.

Ironically, we humans try to create clusters to group individuals and ascribe traits to them. While there can be similarities, and it can often be real, we are all different. Therefore, there is a paradox. On the one hand, the human desire to simplify, classify, and label, and on the other, recognize diversity. How, then, to balance the paradox?

There is value to cluster because humans want to be part of a group and distinguish themselves from others, but how can we make it a force for good and not evil?

The key is to explore the group you belong to or wish to belong to. Reflect on what it means to you and how it adds value to you, your organization and your family. Identity is important, and good leaders use it well. Other, less favourable ones may use it for evil to separate and isolate. We need to acknowledge the differences as benefits, rather than exclusionary means. To avoid “us vs them” thinking.

Where do you stand on it? Is there a true value to segmenting and distinguishing yourself and others? Or is it really about being aware that others can be fundamentally different than you? It is worth recognizing that homogeneity can stifle innovation. Diversity of thought, brought by diversity of people, can help organizations succeed. A multitude of viewpoints can engender new ideas and offer new avenues for exploration.

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I plan to take next week off, so there will be no Managing the Maelstrom on the 4th. So, I wish you and your family Happy Independence and Canada Day.

Cheers,
Julian

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Leadership Loneliness

11 July, 2025

This week's topic is one I've planned for a very long time. It's a common issue and one that impacts CEOs and all levels of management to lesser degrees – **it's lonely at the top**.

Time and again, when talking with CEOs, the topic arises, but it presents itself in many different forms. It is a result of the nature of hierarchy that the leader often becomes isolated. Sometimes, this isolation becomes dangerous because the leader gets left in the dark.

Often, particularly when they are new to the appointed role, the leader feels shunned because things aren't the way they used to be and they no longer have the interactions they once had. Frequently, I hear, "I haven't changed; why are things different?". The response is that, while you might not think your identity has changed, it has.

When I was first promoted to General, I would get very uncomfortable with the stiffness and pomp and ceremony, feeling very much out of place and like an imposter. It wasn't until I was sorted out by my Sergeant Major who pointed out, "Sir, it isn't all about you. It is about the role you perform".

Sometimes, we make efforts to overcome the isolation by trying to engage with the levels below, only to find ourselves more ostracized when no one knows how to connect with us. The adage that familiarity breeds contempt is a by-product of this attempt to reengage.

The isolation also leads to a lack of communication. The level of connection drops, which adds to the sense of isolation.

When leaders feel this isolation, though, they need to realize it isn't necessarily about them (although, in some cases, it is). It is about the nature of the role they are performing and, for the organization to be successful, they must perform that role effectively. In the military, this is known as the "mask of command."

It is important to realize that some of the causes for isolating the leader are :

- The belief that the boss is too busy, I shouldn't bother them
- The boss must already know anything I have to say, so why should I engage with them?
- The boss is naturally very high up; I shouldn't engage with them

Leaders, particularly CEOs, find the last one the hardest to fathom. I recommend that you recognize this new reality. People will perceive you as unapproachable, regardless of how nice you may be. It is again part of the mystique of the role.

Being isolated is hard for leaders. There needs to be a place for them to go to discuss the issues. This is often a question I raise - who do you talk to?

Many leaders often resort to discussing with their significant other, and while you may have a great sharing relationship, you put them at a disadvantage. Your significant other lacks the long-standing context to the problem you're sharing so their feedback is based on that snapshot/moment in time and doesn't have the nuance that may be required to support you. Therefore, all of their responses to you

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will be based on that one moment in time you've shared, and won't grow or change with the issues as they arise, and it would with a work mentor who has the insight to the problem. So, be mindful of what you discuss with them. Having other leaders, mentors, or a coach is usually the best. After all, when under stress and pressure, connection with others is a key coping mechanism.

Finally, the real issue of isolation is that you don't get feedback. Not only may there be few to no opportunities for feedback but, if there is a reluctance to approach you, you will find yourself in a blind spot. In my career, I have found myself in this very position. I have been merrily sailing along without the feedback. There I was, thinking all was great, but inadvertently, I had done something and was mindlessly moving on.

There are two ways to deal with this issue. One simple approach is to regularly ask for feedback, inquiring how something came across and whether what you said makes sense. Could I have said or done something differently? The other is the institution of Best Advice as an accountability.

We recommend to our clients that Best Advice to their manager needs to be a key accountability of every employee. That means that it is an expectation, and the best of our clients make it part of the performance management process. I wrote about Best Advice a long time ago, and if you're interested, I can clarify its other value to the organization. It's a good way to open up communications and drop the walls around you.

It is lonely at the top, and leaders need to acknowledge this reality. The sooner one realizes it and has coping mechanisms, the easier it becomes.

I look forward to any feedback you may have, whether you have found solace or have other views on the subject.

Have a great weekend.

Cheers,
Julian

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The Connected Leader

18 July, 2025

Last week's its lonely at the top missive led to a lot of conversations and input from many different clients. Therefore, I decided to continue the thread again this week.

I had several responses from people who were concerned at the idea that leaders should feel lonely and felt that was very unfortunate. I had never considered that there were those to whom it hadn't occurred, and that truly surprised me. For me, it was a reality of my own experience. However, as I thought it through, it struck me that it is one of the many paradoxes in managerial leadership, all of which are related to the loneliness of being a leader.

The paradox in this case is straightforward. Arguably, the role of the leader is to ensure that their people don't feel lonely. This is especially important, given the statistics that suggest the percentage of employees who feel lonely at work ranges from 20% to a whopping 82%. There is an irony that those who are supposed to ensure it doesn't happen to employees are, in turn, feeling alone themselves.

There is a real problem when those designated to protect the flock become the sheep themselves.

So, if this is the case, how do leaders become isolated? Is it that by virtue of the role itself, they self-select isolation? I provided examples last week that illustrate the need to isolate, as being too close and too chummy can hinder productivity and performance.

Self-isolation is also a bit paradoxical. It is bad to isolate, yet it is also bad to over connect. As a result, the leader needs to determine the right balance. This can be particularly difficult for those who are either new to leadership or to a team.

As with many things, the answers to leadership challenges often involve striking a balance. For the leader, they must balance showing genuine interest through questions and asking about others, with carefully balancing their own perspectives and lives. Without being too crafty, the trick is to share enough so they understand your intent, but not too much to be overly close. The phrase *too much information* or TMI, as it is known, can be out of balance. There is an art to this – to be calculating but also real.

In my experience, though, many leaders do not share their own beliefs and stories. In effect, this becomes a façade for others. Often, leaders believe they shouldn't share their story because no one is interested. In most cases, this couldn't be further from the truth. People want to know what makes their leader tick; they need to truly understand their boss's intent.

The only time to curb sharing is if you are doing it out of hubris or to puff up your own ego. The stories need to add value to the audience and provide real insight rather than war stories and how great you are.

Returning to how to cope with feelings of isolation. A few responses last week reiterated that people outside the chain, such as coaches, friends, and peers elsewhere, should be checked with.

The suggestion that did not come, however, is the role of our own leader in easing isolation.

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In past missives, I have written about the concept of leaders laterally integrating their teams. Lateral integration is also a way to reduce the loneliness of your leaders. Just as the golden rule of leadership is to know your people and promote their welfare, our bosses need to recognize that while they may feel isolated themselves, so will their direct report leaders.

It is essential for managers of managers to understand the phenomenon of leader isolation. It is a reality, just as in the case of employees. However, it becomes more problematic because leaders are making decisions for employees, which can be dangerous for the organization.

Regardless of the level, there are always leaders who can step in to engage with the isolated leader. Even at the top, the CEO should be engaged by the Chair to help them through the isolation.

Hopefully, this week has given you additional thought starters, and I look forward to further feedback on the topic.

Have a great weekend.

Cheers,
Julian

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AI and Thinking

25 July, 2025

I am changing direction this week and in the weeks to come into a realm that is on everyone's lips these days: **Artificial Intelligence**. In the past, I have touched on the nature of AI and its implications; this week, I will delve deeper.

Specifically, to start off with the question that has intrigued me: "*what is the thinking that is going into AI right now?*"

For many, it may be seen as a fad that will pass, while others dread and fear it. While some of it may be hype and noise, my bet is that it won't go away. My rationale is that it is nothing new; what is new is the pace of the advancement and its expansive application.

Furthermore, it seems everywhere you look someone has a perspective on AI. (I add myself to the list…)

So, what is AI? To get a definition, I asked an AI:

Artificial intelligence (AI) is a broad field of computer science that focuses on creating machines capable of performing tasks typically associated with human intelligence. These tasks include:

- *Learning: AI systems can learn from data and experience, adapting and improving their performance over time without being explicitly programmed for every scenario.*
- *Reasoning: AI can process information and make logical deductions to solve problems.*
- *Problem-solving: AI systems can devise strategies and actions to achieve specific goals.*
- *Perception: Through sensors like cameras and microphones, AI can "see" and "hear," analyzing visual and auditory input to understand its environment.*
- *Decision-making: AI can evaluate different options and choose the best course of action based on given data and objectives.*

Ironically, this lists some of the elements of human thinking so, in effect, we are renting out our thinking to machines. So, why not ask what people are **thinking up, about, and through** AI? After all, these are the foundations of human thought.

If I am **thinking up** in AI, I am approaching it from how I might use it, how it might impact our world, or what the next AI will be. It is a solution-oriented mindset that seeks to explore AI, its applications, and their implications. In this case, I can conjure up the worst-case scenarios as easily as the best-case scenarios for AI.

When I **think about** AI, I tend to get caught up in the details; I need information and other perspectives. It will be essential for me to remain neutral and gather facts. The issue will be if I can keep up with the pace of change. This is particularly true as our work tools, like software, seem to be changing weekly.

In the case of **thinking through** AI, I am geared towards solutioning to best achieve an end state of what to do about AI. It is about making choices. The issue here is that thinking can be prejudiced. In a rush to judgement, it may skip past thinking about it or even thinking up how it might be used.

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No one way of thinking is better than the other. They all have a part to play, and the key is to use all three to critically analyze.

I have a sense that some organizations are spending time and energy getting caught up in one without using the others. As a cautionary tale, we live in an age of the "Tyranny of Do" where action is valued over thought. Ironically, one of the fundamental premises of AI is to help us to get to Do faster, so there is a natural predisposition to act fast. The danger of the drive to Do through AI is that we potentially create an "AI arms race" as we try to get to Do faster than our competitors.

So, where is your thinking on AI? Where is your organization at? And what are the relative implications of this type of thinking now?

Have a great weekend.

Cheers,
Julian

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Approaches to AI

1 August, 2025

Thanks for the feedback I received from last week's missive on the thinking that is going into AI right now. It has led me to continue the exploration of **thinking and Artificial Intelligence**.

There is no small irony that while AI is designed to enable easier and better thinking for people, we also need to be measured and thoughtful in how we approach it.

There is no shortage of people and organizations with opinions on AI, however, any discussion of the thinking behind it is incomplete without an exploration of who is truly thinking about it versus just having an opinion on it, as well as the actual mechanics of *how* they are thinking about it.

There is a question I did not ask last week. That is, where do *you* stand on the questions of AI? I believe there are several considerations to answering them.

1. Is AI the flavour of the week, month, or year?
2. Is it a new threat to me or our business?
3. Is it just another change in our already changing world?
4. Will it fundamentally change my work or business?
5. Will it fundamentally change our world?

Since I started these missives on the eve of COVID, there have been many changes, and individuals and organizations have struggled through them. So, where does AI fit in the context of the changes we have seen?

Some pundits and experts have expressed their perspective that this is another major change that will fundamentally alter our world.

I don't pretend to be a technology expert and, while I don't know the details of the technology, I am trying to immerse myself in understanding its implications and broadening impact. I *do* know that it is affecting people, and people are the business of Forrest & Company.

It is creating change. We see corporate directors asking how their organization is responding, managers trying to determine its use in day-to-day work, and everything in between. It is creating change in an already volatile, uncertain, complex, and ambiguous world.

So, where do you stand on this change? In the list above, are you at 1, 2, 3, 4, or 5?

To go deeper, if you accept my argument that it is creating change, where do you really stand in the **ABRUPT model of change**?

ABRUPT represents the very human reaction to change:

- **Avoidance** – this too shall pass, it is just another change in the multitude of change, "*I will wait it out*."
- **Betrayal** – I was just getting settled, and now this comes up. If my organization is embracing AI, "*how can I keep up, and how can they do this to me?*"

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- **Resistance** – I am definitely not engaging in this; I will fight and resist it. I will not allow technology to dictate to me what to do, and "*by the way, here are the examples of where it is wrong*."
- **Uncertainty** – I am unsure of the implications and expectations. "*I am both energized and fearful simultaneously*".
- **Practice** – This has value, and "*I am going to try it out.*"
- **Take it on** – I am all in for this. "*This is the new way forward*".

The ABRUPT model explores human nature and its relationship to change. In other missives, I have discussed the roots of change resistance. The model provides insight into the various stages we experience during periods of change.

The question to ask yourself is where *you* are in the model. But, also ask yourself where your team members, and even the organization writ large, are in the model. You then need to ask if this is where we *need* to be.

Given the multitude of opinions and other noise about AI, these become very challenging questions. These views inform our position on the ABRUPT model. As I proceed with the exploration of AI over the next weeks, I suggest considering where you, your team, and the organization stand.

Have a great weekend.

Cheers,
Julian

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AI and Strategy

8 August, 2025

The purpose of the recent missives about how businesses are thinking about Artificial Intelligence and how they will respond to the change is to explore human nature and organizational behaviour in the face of technological innovation.

There is little doubt that many are avoiding the prospect of AI in their work, just as there are those who are ready and willing to take it on.

This week, the Globe and Mail heralded "*Canada's risk-averse businesses are slouching toward AI*". Even while businesses using AI report increased efficiency, reduced costs, higher sales, improved customer service, and better management of sales, production, or inventory, there are still holdouts. RBC, according to the article, reports that only 12% of Canadian firms have integrated AI into their production or services.

I would argue that, at the root of the slow uptake, making "*Canada rank among the least AI literate nations globally*", is an issue of organizational thinking.

Over several weeks in these missives, I have explored the nature of risk and how it hinders decision-making. There is no doubt that this is often the issue in some cases of why organizations have not embraced AI. They are living the avoidance, betrayal, and resistance portion of the change model I used in last week's missive.

In other cases, the thinking about AI is not being done at the right levels in the organization.

Human thinking may stymie the exploration, and it is important to consider where you and your organization may be approaching the exploration. The way organizations think about the prospect can be characterized in terms of levels.

1. The first level is purely the management of execution. How and which AI technology will employees use to do their work.
2. The second level involves examining the systems that will support the use of AI in work execution. How work interdepends in an organization using AI. It is not just about the task application, but how it interrelates.
3. The third level requires exploring the plan for the implementation of AI, the relative cost and benefits of implementation, and how it all interrelates across whole departments
4. The fourth and final is how AI relates to Strategy. It is about making the call on how AI will or won't support what the organization wants to be as an entity. It is about integrating the expectation of AI into the culture.

While AI changes rapidly and leaps forward are frequent, organizations need to look ahead and assess where they want to be rather than getting caught up in individual technologies.

Often, when an organization focuses on Level 1 thinking, it becomes caught up in the loop of "*we just have to do something*". Thinking gets overwhelmed by the desire to do something – anything – to move things forward and "catch up".

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Thinking at the fourth level above should be the starting point for an organization to truly reap the benefits of what AI has to offer. However, it **must** be tied to the organization's Strategy. If it is purely Level 1 thinking, then you may get incremental gains in day-to-day work but never realise the full value.

Level 4 thinking is about making deliberate choices. It involves assessing risk, but it is a careful and methodical choice about what AI means to your organization.

Strategy is the North Star that provides your employees with the rule-set to make decisions to move the organization forward. Level 4 needs to precede the others; otherwise, the full potential of the organization is hindered.

This is a conversation for now, not a future one down the road. AI is no longer a futuristic concept, it is a present-day element that is actively reshaping industries and jobs. The cost of inaction increases each day and waiting too long risks not only inefficiency but irrelevance or being outpaced. Level 4 thinking is essential, not only to align with organizational goals, but to shape a culture of innovation and adaptation to emerging technologies. Waiting to “see what happens” or until the “technology settles” doesn’t work anymore. While it seems cautious and prudent, it can mask uncertainty and get you left behind.

So, again this week, consider where your organization's thinking is. Are you caught in a loop at Levels 1 through 3, or are you defining the North Star and then enabling the other thinking to follow it up?

I hope this has given you pause for thought.

Have a great weekend.

Cheers,
Julian

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Artificial Intelligence Levelling

15 August, 2025

Last week, I explored the nature of AI thinking levels and their relationship to organizations. It also elicited a number of comments, and I appreciate all the insights from various angles.

The levels I represented last week naturally reflect those of an organization. This framework is designed to demonstrate the depth of thinking required at each.

They are commensurate with the naturally occurring levels in what we refer to as a Stratum 5 organization. As a recap, here are the levels of management of Artificial Intelligence used alongside their typical titles:

1. Level One is the Manager level of an organization – it oversees how and which specific technologies employees use to do their work.
2. Level Two is the Director level – it ascertains which systems will interrelate and support the use of AI in the execution of work.
3. Level Three is the Vice President level, which explores the operational plans for implementation and how it all interrelates across departments.
4. Level Four is the President or CEO level which sets the strategic direction for AI, determining its role in the company's future and integrating it into the culture.

These are common titles and don't reflect organizations that may have Senior Directors or VP. If you have these sorts of titles, then establishing the clarity of which level this work occurs at is essential.

In more complex organizations (Stratum 6 or 7), the CEO needs to consider other elements.

- Level Five (Stratum 6) CEOs needs to balance AI in relation to the long-term viability of the organization, 10 to 20 years out
- Level 6 (Stratum 7) CEOs need to ensure alignment of the corporate effort with the global future, which must consider 20-plus years into the future.

If the organization has a Board in place, then they are accountable for the highest-level thinking required. Boards are getting increasingly involved in thinking about the implications of AI through their governance role.

Functions must also be considered. The goal is to ensure the thinking is there to integrate strategic levels with business functions. Like the rows and columns of a spreadsheet, this creates a complete picture for decision-making.

Various business functions are addressing AI based on their typical organizational roles. Here are a few general examples:

- IT - Accountable for the technical implementation and infrastructure of AI systems.
- HR - Managing the human impact of AI, guiding the workforce through this transformation.
- Operations - Deploys AI across functions (sales, marketing, supply chain) to execute the corporate strategy.

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- Executive - Provides top-down direction and sponsorship for all AI initiatives.
- The Board - Provides oversight, focusing on competition, risk management, and long-term governance.

These are gross simplifications. Both the application and the awareness of the need to even consider the impacts are unevenly distributed. In our experience, not every function is thinking about it like they truly need to.

Ask yourself, is this thinking happening in your organization? If not, where is it lacking and why?

Have a great weekend.

Cheers,
Julian

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A Final Word on AI & Strategy

22 August, 2025

For a month now, I have dedicated Managing the Maelstrom to the topic of Artificial Intelligence. The work of Forrest & Company is about the nature of managerial leadership; so, why discuss AI?

The application of Artificial Intelligence requires serious thinking by organizations. Not just around how to use it, but the role of managerial leaders in the face of it, and how it impacts the Strategy. This is as much an Organizational consideration as it is a technical one, if not more.

This week is the culmination of the series.

I believe that the AI discussion encompasses a series of levels, ranging from strategic to operational and tactical perspectives. The last two weeks explored these levels. In many cases, organizations and individuals have viewed AI from a tactical perspective; e.g. what products are available, and how can they be used in day-to-day work?

When speaking with clients, there are also those with operational-level accountabilities. By this, I mean they have people tasked with developing plans for the implementation of AI. In many cases, they are doing operational planning or the tactical search in a vacuum. That vacuum is the lack of Strategy.

By Strategy, we mean the highest level of thinking in an organization that envisions the spirit of the business direction, identifying the achievements that will realize its true nature. Strategy defines the organization and becomes the core criterion that employees use to make decisions and drive toward goals.

In some cases, there is an assumption that AI will merely be bolted onto the existing Strategy. While this *may* work, it does not represent us having truly looked at the implications to key elements of our Strategy, such as:

- **Our Purpose** – articulates the true intention of the business in relation to the market and AI's role in that
- **Our Unique Sustainable Competitive Advantage** – our unique selling proposition and how AI may enhance it
- **Our Strategic Drivers** – what drives our business and how we can use AI to support it
- **Our Values** – how AI relates to what we value as an organization
- **Our Mission and Vision** – how AI will help us achieve our vision and relate to our chosen field

These are just some of the elements of Strategy and how AI can influence them.

Strategy articulation ensures that we get lateral integration across an organization to align everyone. Time spent here is seldom wasted. However, it requires thought and establishing the North Star for the organization to rally behind.

In the age of AI's ascendance, strategic alignment is key. However, to achieve that alignment, we must be willing to look out into the future at the ambiguity of a yet-to-be-realized potential future. Yes, the tactical AI products and how we utilize them may change our direction somewhat, but we need to

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consider the future and make a call and decision on what we truly want to be as an organization. It requires us to predict a future amidst uncertainty. It is about embracing complexity and using our judgment and discretion. From these decisions, we can establish the accountabilities and authorities of our employees amongst this complexity.

Strategy is the work of the executive in conjunction with its governing bodies. If we rush to the operational level too quickly, we many inadvertently create more change and confusion for our employees.

By looking before we leap, we help our employees and ensure we direct our time and energies.

So, the final question this week is: are we clear on the role of AI at the strategic level? If not, what is necessary to ensure the lateral integration of our organization before we proceed to vertical execution, either operationally or tactically?

I hope this has once again given pause for thought, and I invite you to engage in this exploration to help create a great place to work that delivers the Strategy.

Have a great weekend.

Cheers,
Julian

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End of Summer Realignment

29 August, 2025

Here it is, the last Friday of August and, if you are like me, you are probably wondering where the summer went.

Summers are always interesting. In the Northern Hemisphere, it is the time of vacations and breaks from the grind that the other 8 or 9 months of the year provide.

As such, it is often a challenge to continue working diligently during the summer months. Individuals and teams are off on holiday, taking a break from the normal drive to get things done. The advent of technology has enabled people to work from cottages or vacation spots, so much of the work done is carried out with one eye on the screen and the other on the beach/water. This means there can be drift from priorities and often we can find we are no longer on the same page (but are hopefully still in the same chapter and book).

To me, the beginning of September often feels like it is the New Year. It is likely a result of years of schooling, but I find there is an opportunity to take stock and restart the year.

Regardless of when your corporate year-end occurs or the calendar year ends, now is the chance to change trajectories and reinforce your current position.

If you are like me, though, being away for a while means that I am not in my same usual working cadence, so getting back to it may require a wake-up and re-alignment.

One of the most overlooked management practices is **context setting**. In 360-degree feedback or corporate surveys, it is often the lowest score for management.

I get it: We put our heads down and get on with work. What we miss, however, is the opportunity to align everyone and clarify changes in the environment. The military has a phrase for this and its value: it is “the common operating picture”.

A hard restart after the summer holidays is the perfect opportunity to realign your teams, as well as ensure that you are also on that common operating picture and back on that same page.

As the last vestiges of summer (albeit not the true equinox) are upon us, here are some questions to ponder and prepare to re-play to your team:

- Where do we stand now?
- What has changed internally since we were all together consistently in June?
- What changes are there in our operating environment? (e.g., competition, regulatory, community)
- What needs to be reinforced? (e.g., the Strategy and the priorities)
- What changes, if any, are there to the organization's plans?

These aren’t the key details of context setting, but they are thought starters for you to consider clarifying for yourself and your people. In this way, you can get them up to speed quickly.

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Hopefully, this has given you food for thought as we step back into the maelstrom.

Have a great weekend,

Cheers,
Julian

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Lateral Integration & Vertical Execution

5 September, 2025

There is always one topic that gets traction as an issue in business. In previous missives, I have referred to it, and it is a key point in my book. In short, it is the issue of **lateral integration and vertical execution.**

When not engaged effectively, issues around vertical execution and lateral integration cause sweeping challenges for organizations. We hear these symptoms often and many may resonate with you:

- Uneven application of policies across the organization, such as attendance management or working from home
- Confusion or lack of awareness about what other teams are doing that can cause friction, overlap of effort, and the like
- Lack of support from peers in other departments
- Differing application of leadership practices across the organization
- Unclear or conflicting priorities across the organization
- Vastly different goals and objectives for different groups
- Resource squabbles between groups
- The creation of silos in the organization
- Slow decision-making due to unclear ownership or excessive escalation for answers
- Lack of knowledge transfer and learning between teams/protection of own team interests
- Inconsistency in organizational processes and client experiences
- Delays in projects caused by misaligned timelines or dependencies
- Gaps in accountability causing things to be missed/overlooked or forgotten
- Mixed or confused messaging

These are all hallmarks of what we refer to as vertical execution **before** lateral integration. It is the classic problem of putting the cart before the horse.

The premise of lateral integration is that we must **first** be a member of our manager's team before we can lead our own team in executing work. It is a relatively simple construct, but it has huge implications if we don’t get it right.

If we rush to get started on our work and lead our team, we can end up on a breakaway from our peers. As a result, we splinter the organization because we have not ensured our own team is integrated laterally with one another. When this happens, the splintering grows and silo walls harden. We end up not with a cohesive entity, but a series of constituent parts moving in different directions.

There is a natural inclination to take the lead vertically within our team. Literature on leadership consistently emphasizes the importance of getting out and leading your team, creating a natural tension for vertical execution. This gets further exacerbated by the Tyranny of Do – get things moving. That is our tendency to get things moving, but if we aren’t aligned, where are we going?

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The golden rule of lateral integration is that we must first be a follower before we are a leader. We need to follow our leader and ensure we are aligned as part of their team first before leading our own. The same goes for our own people. Our own team needs to be laterally integrated before our people go off and do work.

The first level of lateral integration, therefore, must be at the executive level. If the executives are not aligned, we will create a stretch that is impossible for the rest of the organization to lash together.

The essence of lateral integration is that it is the accountability of the leader to ensure the alignment. That said, sometimes we need to prompt our leaders through Best advice if they don't see it. That ensures we start the process of lateral integration.

So, the question of the week is: Have you seen any of the symptoms above? If you have seen the hallmarks, then it is time for action. If you don't hold the keys to the top of the house to change it, then how can you take care of your own team as well as influence your manager and the organization?

Next week will be all about the elements of lateral integration to stop the dis-integration.

Have a great weekend,
Cheers,
Julian

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Laterally Integrating Your Team

12 September, 2025

Amidst the maelstrom of September, I am revisiting last week's topic. You will recall that it was about the need for lateral integration before we execute vertically.

While simple, these terms carry significant meaning and impact. When an organization is too focused on teams getting out and executing without being aligned laterally, it often finds that it misses its goals and silos emerge, where individuals are isolated and jostling for resources and effort. The real impact is the splintering of human efforts and the creation of mistrust, which further hampers growth and hinders long-term success.

Frequently, when we make the point about lateral integration before vertical execution, we get the comment, “It makes sense, but what does lateral integration really mean, and how do we do it?”

Defining how a team is to integrate laterally is a significant amount of work. However, I argue it is the most important work you do as a managerial leader.

The first essential step is to bring your team together as a group. This cannot be done by decree or email.

Your team consists of those individuals who report directly to you. This is important because, in some cases, they may perceive themselves as disparate and not interrelated. However, it is critical to understand that your direct reports are those resources that your manager has given you to fulfill your accountabilities. In this way, they are your collective “team”, regardless of how interrelated their work may or may not be.

Here are the steps to lateral integration:

1. **Clarifying Scope and Context.** This is a critical step often overlooked by managers. Context includes:
    a. Why is work being done?
    b. External factors that impact the work of the organization
    c. Internal factors, including clarity of what our own managers expect.

This is the step that connects your team to your manager's team and aligns everyone with the strategy. It clarifies how your work relates to your peers so that your team of direct reports is clear on how it all pieces together. This is also where you begin the process of clarifying your expectations for the team to work together.

2. **Clarify Understanding.** Again, this is a step often missed. It is where you ensure they understand by asking questions. This is also the step where you make sure they have bought into your expectations. This is where we have the opportunity to resolve any issues to prevent cross-functional finger-pointing. Left unresolved, this finger-pointing will strengthens silos.
3. **Individual and Team Roles.** This is where your homework is necessary. You need to be clear on what each individual is accountable for and what authority they have in fulfilling their accountabilities. This is the essence of role clarity, which we find is one of the most common

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employee pain points; they are unsure of what is expected of them. This doesn't stop at the individual level; instead, they need to be clear about how their work interrelates with one another.

4. **Team Behaviours.** This step involves clarifying your expectations for how employees are expected to behave, both individually and as a team. If this is overlooked by managers, we run the risk of employees working together in a disrespectful manner. How you do this is up to you, but it should be a cascade from your manager's team, which in turn should come from above that team, and so on. When managers don't clarify this, we leave it to employees' sense of responsibility. On the surface, a sense of responsibility is great. The issue is that we all have different senses of responsibility, with varying values, experiences, and beliefs. If we don't align the team at this level, we can't expect the cascade into our direct reports' teams as they go to vertical execution.

This is only a brief overview of lateral integration. Two things to bear in mind:

- This doesn't stop at your team. You must hold your direct reports accountable to laterally integrate *their* teams so that the organization is aligned top to bottom.
- This is not a one-and-done exercise. You need to keep reinforcing all these steps when your team is together. This becomes a key agenda item whenever they are together. As a hint, always revisit behaviours because they represent how employees work and interact with one another.

As organizations come together in September, this is a great opportunity to start the process of lateral integration. As well, as organizations deal with return-to-office mandates, there is a great opportunity to bring everyone together and reinforce lateral integration to show the value of the team and thereby build it.

If you are looking for more details, feel free to reach out.

Have a great weekend.

Cheers,
Julian

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Examining Fear and Risk

19 September, 2025

For this week's missive, I am revisiting a ubiquitous issue that I believe has a huge impact on our society and business today – I am revisiting the topic of **fear and risk**.

I have chosen it this week because everywhere I turn, I seem to encounter fear on so many levels, whether at the strategic level, fear for our planet, fear at work, or fear in our own homes. A common fear in today's climate is that of Artificial Intelligence and its implications on employment and society.

Fear follows us daily. For some, it dominates; for others, it lies dormant, surfacing unexpectedly.

Interestingly, the etymology of the word "*fear*" is rooted in "*danger, peril, calamity and even surprise attack, or ambush*". What I found interesting is the notion of it being a surprise or an ambush because fear is often something that suddenly appears and catches us off guard. At its core, fear is a reaction that bypasses deeper thought.

That surprise provokes an emotional event that, in some cases, can freeze us into a stupor. The ambush aspect is that it can quickly alter our chosen plan or direction.

Fear is an aspect of our thinking. By thinking, I mean how we use our whole selves to do something. Thinking isn't just the cognitive realm. Thinking requires the interrelationship of our cognitive *and* affective thinking. In the case of fear, it is often purely affective thinking driven by our emotions. Simplistically, fear comes from thinking from the heart.

In certain circumstances, fear can be useful. An intuition or caution, a premonition of danger – these can help us stop and evaluate and consider situations. But, when these stymie us and cause us to move into paralysis, we must figure out how to move past that to action and analysis.

At some point in human history, that fear reaction was essential for our survival. So, how do we deal with it in situations when it is less essential for our existence?

The way we manage it is by using the basics tenets of risk management. The etymology of the word "*risk*" seems to be a matter of contention, but exploring it is worthwhile for understanding the word's intent. Some say it is a result of the dangers in seafaring, such as a reef or cliff, or the difficulty in avoiding them in the sea, or it being a gift of providence or chance.

The word evokes a range of perspectives and is often confined to specific roles within an organization. But recognize it is more universal than that limited view. Every decision we make has the shadow of risk hanging over it.

Risk and fear are interrelated because, if we fail to explore the risk, it becomes fear.

Unlike fear, risk invites examination. By exploring, I mean we must move from the emotional and affective to the cognitive, and actually engage with it. We need to truly explore it with our faculty of thought and evaluate the risk, bringing it from hypothetical into the realm of reality.

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This line of thinking needs to explore what might *possibly* happen, and then ascertain whether that is *likely* to happen and how *severe* the consequences might be if it does. It moves us from awfulizing and catastrophizing to legitimate and rational exploring.

Exploring likelihood and severity often requires a guess, but that is the nature of thinking. Sometimes you can't have all the details and facts – instead, you need to make a judgement call. This anchors us in reality.

Recently, when I explained this to a team, one of the members quipped that this is the ultimate life hack. It's about considering what you face through the lens of potential outcomes, assessing their probability and severity, and potentially mitigating them.

In this way, we can begin to master our fears, but the final point is also to realise the degree of control we have over the events. Far too often, they fall within our sphere of interest, where we have *no* control. It is better to be able to identify what we can *fully* control or even *partially* control. This is the essence of risk assessment and thinking through our fears.

Fear thrives when we leave risks unexplored. Once we engage cognitively with risk, fear gives way to clarity and control.

These days, whether your fears are about things like AI taking your job or using the right AI, or if you're concerned about AI taking over the world, it all comes down to thinking it through.

Have a fearless weekend.

Cheers,
Julian

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Leader Behaviours

26 September, 2025

One of the perks of watching leaders in action is seeing how different leaders respond to events and go about the business of leading their teams.

This week, I was struck by how some leaders are behaving towards their people. It feels like there has been a gradual drawdown of decency in managerial leadership. It is likely a reflection of the general trends in society, but it leads us down a worrisome path.

These are just my ruminations, and I encourage anyone to challenge me on this issue, but it feels like we have lost sight of the sacrosanct covenant between the leaders and the led. Whether there's a greater focus on a dog-eat-dog world of survival of the fittest or is just a matter of malaise that has crept in, it all reflects a sense of lack of caring.

In past missives, I have written about the growth of hubris among managerial leaders. In those cases, I had observed the development of a belief amongst leaders that they knew better. It now feels as though it has gone a step beyond pride and overconfidence to almost a lack of concern for those who work for the leaders.

I think COVID had an impact. During the pandemic, there appeared to be a genuine concern for employees and their wellbeing. Accommodations were made to support and bolster as much as possible. Perhaps in the post-COVID era, we are seeing a counter-reaction or rejection of those concerns, due to push-back from employees around some policies. Additionally, there may have been a period after COVID when everyone was concerned because there was a shortage of employees, and everyone was being cautious to retain them. Instead, in changing times, we openly discuss how technology will replace employees.

The hallmarks of not caring for employees are showing up as:

- Bullying – talking down and embarrassing employees
- Intimidation – frightening employees with subtle and not-so-subtle threats
- Criticism – going out of the way to find flaws and actively flaunting them

While the intent to do these things may not be there, as far as the employee is concerned, it doesn't matter – it is still there. It still makes it hard for the employee to give their full effort to the business and ultimately remain engaged in their work.

This all leads to a lack of trust in management. It damages the fabric of an organization and, in the long run, is unsustainable.

We argue that every employee has the right to be physically, socially, and psychologically safe. That is an authority they need to do their best work and give their Best Advice.

It is the role of management to protect this right; it isn't the role of whistleblowers or human resources. For an organization to be successful, there must be checks and balances in place to ensure that management is protecting the basic human rights of employees. If this is the work of management, then what is to be done when they are the perpetrators?

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This is where accountability comes into play. Management needs to be held accountable by *its* management. The line “the only thing necessary for the triumph of evil is for good men to do nothing” comes to mind here. If you lead leaders, then you must hold them accountable to be good managers.

We must not turn a blind eye to the manager who delivers great numbers but leaves a trail of bodies behind. We need to focus on behaviour and value and not solely on output. We need to apply consequences to leaders who behave poorly toward their people as the impact cascades and compounds throughout the organization.

At the same time, a look in the mirror is warranted. We need to ask ourselves how we are coming across, and we must dig deep into our sense of responsibility to determine who we are as leaders and how we are perceived. As I write this, I must challenge my own hubris and refrain from being sanctimonious about myself as a leader; like all of us, I need to cultivate genuine self-awareness.

Managerial leaders today need to step up in a volatile, uncertain, complex, and ambiguous world and ask themselves how they can help their people through these times rather than hindering them.

My challenge to you this week is to reflect on your own direct report leaders and ask if they are truly ensuring that your employees are safe physically, socially, and psychologically.

Have a great weekend
Cheers,
Julian

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Cyber Security

3 October, 2025

This week, I am going to tackle the topic of cyber security as I had the opportunity to sit on a conference panel this week on the topic. Not being an expert on cyber security, my lens was that of how we identify, explore, prioritize, and ultimately manage risk.

The conference focused on the implications of cyber threats and security on supply chains. While the implications of cyber threats to supply chains are a niche topic, there were many take aways I have reflected on and will pass on to you.

I will try to convey both what I discussed and what others brought to my attention.

1. Cyber security does not have our attention as it once had. Based on my observation, organizations are not really focused on cyber threats. Right now, the focus is on AI and, while the two are both sides of the same coin, the risks of cyber security have taken a back seat to the preoccupation with AI. At the same time, the nature, scale, and sophistication of cyber threats have become increasingly damaging and dangerous.
2. Cyber threats are everywhere. It became clear at the conference that it is not a matter of "if" you will be attacked, but rather "when". In subsequent conversations with clients, most have stories of having had to deal with these challenges.
3. We are under threat everywhere and the Canadian public does not appear to understand or appreciate the nature of it. The media tends to focus on non-state actors attacking peoples' personal lives while ignoring state actors. The key triumvirate of Russia, China, and Iran is working daily to disrupt our society by attacking individuals, government, and business.
4. Cyber attacks work to destabilize. In the 2020s, cyber crime performs the role that was played decades ago by the agitator, the obstructionist, the radical, and the saboteur. This makes it much harder to discover, identify, and prosecute.
5. Your house may be fireproof, but is your neighbour's? Organizations may have taken steps to address cyber threats but those in their supply chain may not have. As a result, if you do not face issues of reputational risk because of your inaction, you may face it through the risk of association.
6. Legislation is filling the gap. In the face of these threats to our nation, the government has stepped in where it believes business is not ensuring accountability. For example, shortly, the CMMC Cybersecurity Maturity Model Certification will be implemented, which will require any business working with the Department of Defense in the US to be certified as secure. Canada will soon launch the CPCSC Canadian Program for Cyber Security Certification for all federal contracts. Failure to comply may result in loss of contracts, fines, and reputational damage. While this may not affect you yet, you can anticipate that it will expand as compliance and governance regulations often do.

My main reflection is that it truly is a risk and needs to be treated as such, and its implications need to be explored, not just by the IT/IS team but by the Board and the executive.

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As I have said before, unexplored risk becomes fear. If we don’t explore risk at the top of the house, it will create fear at the bottom. When we explore risk, we need to assess its impact, likelihood, and potential upside. So, if we decide that cyber security is not a real concern for us, then as long as we have considered it and thought it through, we have been intentional about it. But, do so at your peril.

In the age of AI, where fear already impacts many people's perceptions of technology, if we are not addressing cyber threats, then we are piling on more stress for our employees.

I am not trying to be Chicken Little here, but we must be aware of the threats around us and make informed decisions accordingly.

Have a risk-free (well, perhaps risk-managed) weekend.

Cheers,
Julian

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The Nature of Organizational Structure

10 October, 2025

This week is a topic that has come up several times: **the nature of organizational structure**. Structure is a critical topic and often refers to how a business's financial and tax framework is set up; however, that is not what I am talking about. I am referring to how to organize a business to deliver the strategy by determining the number of management levels and the categories of functions.

If structure is not carefully thought through, it leads to inefficiency, ineffectiveness, a lack of trust, reduced productivity, and increased financial costs for the organization.

In my experience, many people use their instincts and intuition to structure their teams, while others rely on what has been proven by unrelated businesses to work. The most common case is that the structure is built upon the personalities of employees and how they interrelate. All of these approaches are the causes of the impacts above.

Structure **must** be based on guiding principles and science. The essence of that science is that structure is based on the notion that human effort performs the work inside the organization, so effective organization design must consider human capability. Therefore, the starting point for structure has to be based on an understanding of what makes humans work.

We see that the ability of humans to work effectively is made up of four elements, these are:

- Skills, knowledge, and experience,
- Attitude and motivation towards the work,
- Their ability to behave reasonably at work, and,
- Their cognitive capacity to conceptualize and think through work.

Cognitive capacity is the governor here. We all **want** a boss who has greater skills than we do. However, that is not always the case. But what we **need** is a manager who adds value to us by conceptualizing the work and providing context for why we are doing it. In other words, we need a boss who thinks bigger than us, not necessarily someone with more skills than us.

This is the rationale for why we have levels and hierarchy and we often overlook this critical piece in understanding hierarchy. Again, the intent and desire is to be led by people more capable than ourselves. It is a critical dynamic, encompassing various issues such as values, beliefs, and experiences.

But before you get too concerned about my being too hierarchical, let me reassure you for a moment. Most organizations are only five levels from the top to the bottom. Strangely, when I mention these levels to CEOs, they say even that seems like too many. However, when we look at their structure, we find there are anywhere from six to nine, even though they likely need only five. They have crafted bureaucracy without knowing it.

An important point to remember here is that it doesn’t mean the top is the most important and the bottom is not. Instead, in a well-structured organization, everyone’s role is critical to deliver the strategy. No level can expect to work without the others.

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Once the levels are sorted, it is a matter of clearing up the functions. Usually, we are good at selecting categories, but what happens when we mix up tasks in a role and make it too complex? Alternatively, what happens if we make it too small? Employees will either burn out or rust out.

An oft ignored aspect of this is how work is done between the roles and functions through interrelationships. When we fail to define the interrelationships between roles and functions in our structure and how they are to work together we damage trust and create inefficiencies. If we leave it to our employees to sort out, it can result in bullying, angst, and disengagement.

In these short missives, I can't define all the issues and implications, but I can leave you with some final thoughts on the implications of poor structure that we have measured. The cost comes from a sunk cost. For example, when you pay a Vice President their salary but they are unable to perform their role as VP because of poor structuring, it incurs costs for you. If they aren't fulfilling their role as VP, it impacts others, meaning you aren't getting your money's worth from them, and so on.

Sorry to reduce human effort to a mundane financial number, but it is a reality that few organizations understand. They restructure with impunity, only to wonder why they can't deliver the strategy.

As you go into your weekend, ask yourself how many levels there are in your organization and whether you have clarified the interrelationships. If all is good – great; if not, give me a shout.

For those in Canada, have a great Thanksgiving and, in the US, Indigenous Peoples' Day.

Cheers,
Julian

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The Continuing Impact of COVID

17 October, 2025

Managing the Maelstrom was a project I started over five and a half years ago. Specifically, it was 13 March 2020, the day the earth stood still as we shuttered offices and sent people home because of COVID.

Over the early years, I wrote about the impacts of the COVID-19 era on business, leaders, employees, and families. Since then, we have continued with COVID in the rearview mirror as the world emerged from it and shook off its effects.

This past week, however, I have been involved in many discussions about the longer term impacts of COVID and how we are, or are not, dealing with them. So, this week's missive is about my ruminations on the subject.

Initially, during COVID, all efforts were focused on getting back to "normal". There was a drive to get back to where we were; a natural desire to put an end to it and move on. In those efforts, we pushed forward and didn't look back. However, in that same effort I think we have overlooked the effects it had.

In reviewing the missives from then, here are some of the effects I noticed at the time:

- **Contrasting Emotional States and Mental Health**: Employees experienced both a sense of loneliness and an increased camaraderie within the wider community. As a result, we found new coping mechanisms alongside heightened anxieties like gathering in groups.
- **Shifts in Work Effort and Environment**: There was a massive change in the work dynamic led by working from home and stressing to put in the effort to appear productive at all hours. This was often paired with a strong desire to get back to the old days but also a widespread belief that we would never go back to the way it was.
- **Changes in Trust, Leadership, and Norms:** The pandemic created confusion over what the truth was, leading to a distrust of authority and a challenge to accepted norms. At the same time, this chaos led to a realisation of the importance of leadership and necessitated an active effort to engage with our employees.

This is just a smattering to name a few, but as I reviewed these, I was staggered by how many have continued and how some have fallen off.

If we pause and look at what COVID was, we see that, for the Western world, this was the seminal event in generations since before the Boomers. At its core is that it was either rightly or wrongly seen as a traumatic period that threatened our and our families' very existence. The enduring nature of many COVID effects suggests they maybe aren't temporary impacts, but rather deep-rooted symptoms of existing issues in the workplace. COVID-19 acted as a catalyst that forced an immediate re-evaluation of organizational practices that may have already been eroding the workplace.

Given this, perhaps we need to spend more time thinking about these impacts. Instead of assuming that we will just get back to normal, or dismissing them as "COVID-related", we may need to accept that much of these were always normal, they were just illuminated by the events. Perhaps we need to shift the question from "*What did the pandemic do to us?*" to "*What existing issues did the pandemic*

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expose?" The confusion, distrust, and leadership gaps that surfaced were not all created in 2020… many were pre-existing systemic flaws that had been long maintained out of a sense of inertia or "*we've always done it this way*." The pandemic may have simply removed the structures that allowed us to ignore them, forcing them into sharp visibility. Either way, we need to acknowledge the impacts.

To me, these are the impacts we are seeing that can be traced to those days:

- The new age of loneliness at work
- The reluctance to return to the office
- The new leadership that doesn't care about employees, but is only focused on metrics
- Anger in the streets
- General angst and foreboding
- Distrust of others
- Exhaustion and burnout

It seems that the negative aspects brought to light by the COVID days have entrenched in our workplaces and our society. Only by understanding the causes can we start to find ways to overcome its effects.

We need a reset to a new world where the good that came from those days can overcome the dark side. Genuine recovery requires a commitment to correcting the systemic failures that the crisis so clearly revealed.

Perhaps over the weekend, think back to those days, remember the line-ups at the grocery stores or how you were first able to reconnect with others, or anything in between. I think you will find in that reflection the power that got you through it.

Have a great weekend.
Cheers,
Julian

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Lingering Effects of Covid

24 October, 2025

In last week's missive, I wrote about the lingering effects of COVID from over five years ago. Specifically, I was referring to the psychological impact. My premise was that we have moved fast to get it behind us, and yet it is baggage that surrounds us now, and we may not be looking at it.

While I focused on themes and the messages, I was reminded by my good friend that perhaps the baggage we are surrounded with is not just COVID but other issues as well. To place the blame for the problems of the general malaise of society on the feet of the existential threat that COVID posed is too easy. As was pointed out to me, treating the issues as "remnants of COVID" is too simplistic and suggests they'll naturally disappear.

At the time, COVID became a catalyst for evaluating the way we've always done things, and, galvanized by a worldwide pandemic that forced us to take stock, we changed our old, entrenched ways of thinking.

However, as I see it, three trends were already at work in society that were exacerbated by the advent of a pandemic.

The Lack of Truth. Well before the pandemic, I attended a conference in Rome that focused on how society gets back to the Truth in our media. At the time, society was well in the throes of dealing with "fake news". Mainstream media was in an existential threat from the growth of unproven, supposed facts. This was assisted by the proliferation of social media, which didn't produce facts but rather reinforced personal judgements based on what we liked. The algorithms took over, reinforcing what we looked at and creating confirmation bias.

COVID made this worse for two reasons: as we isolated, social media reinforced our view and, since we had not seen a worldwide pandemic in 100 years, there was no precedent and there were competing "truths" to be found. As an example, should I socially distance? No, but now yes. Do I wear a mask? No, but then yes. These all played on us, and then, using technology to give us proof, we were locked into mindsets.

The next issue was attached to this: **the new way of working.** While HR pundits had long opined that the ways of working were about to change, on the 13th March 2020, as we poured out of offices, we faced a new reality. Again, we didn't know the Truth, but whether it was parents no longer at work or children at school, or elderly parents locked away, the world changed.

Once again, we were faced with a dearth of Truth. Will I ever go back to my office? Can I now live wherever I want? What is the Truth? The impact on workers was immense. We tried to bring people together via Zoom or Teams meetings but, over time, we would zone out, and the value of those attempts faded. Its lasting impact will be the new sense of loneliness that I wrote about last week.

Finally, what I would argue is the overarching issue, prevalent before COVID but now rampant, is **the lack of accountability**. The seeds of society's decline lie in the lack of accountability. Accountability is where the good that one does is recognized outside the individual, and, conversely — and more importantly in this case — holding someone to account for their behaviour is not exercised. The controls

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that were in place in society before COVID have gone, and bad leaders, oligarchs, and megalomaniacs roam freely with impunity. They manipulate the Truth, and they create expectations for those striving to be part of the inner circle.

We need to call out mistruth, we need to create great places to work again, and we need to hold people accountable for their behaviour rather than merely shrugging it off and expecting things to change on their own.

I believe this is the path to getting out of where we are today. The fundamental building block, however, is accountability. We can't hope that we will all somehow fit into a common code. The reality is that we are all different and, while COVID may have broken down the old walls, we need new ones that reinforce Truth, a flourishing environment, and curbs on power.

Hopefully, this has given you food for thought as you head into the weekend and beyond.

Have a great weekend.

Cheers,
Julian

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A Pause for Remembrance

7 November, 2025

This is always an awkward time of year for me and many of my comrades. As we move into the days before Remembrance Day, veterans across Canada and the Commonwealth reflect upon their service, friends lost in both body and spirit and, more importantly, the generations of soldiers, sailors, and aircrews who answered the call of their nations.

In Canada, we recognize it as a week and in other nations an even longer period of time. It usually really kicks off with Remembrance Sunday, the Sunday before the 11th of November. It culminates with the 11th hour of the eleventh day of the eleventh month.

It is almost impossible to express what this time means. Even after having hung up the uniform over ten years ago, I struggle to articulate my feelings at this time. At best, I feel melancholic; at worst sadness. A sadness for those I knew who I have lost, who gave their all, and a reflection on how I wish I could do more.

Modern veterans rarely see this as a time for them, often reflecting on the efforts of the greatest generation of the Second World War or those who served in the horrors of the First World War.

There are those who do not understand this time and often see it as a time when people glorify war, and they mistake it as war mongering.

However, it is often those who were willing to sacrifice themselves for their country who are the greatest pacifists because they know the true horrors of war.

This brings us to what this time of Remembrance really means. For me, it is a time of reflection on the efforts of those willing to pay the ultimate sacrifice for others. It is about understanding and reflecting on what it means to believe in something greater than oneself. It is about being willing to answer the call for the greater good.

Throughout the Commonwealth, we commemorate this time through the poppy. When people wear the poppy or adorn their homes with poppies, they are saying that we see the sacrifices of others so we can have a better life and a better world.

Veterans don’t want to hear "thanks," but they appreciate it when someone wears a poppy because it says, "I see you, and I thank you for being willing to step up for me."

I had the chance this week to see this in the UK. I drove through the countryside and small villages, and it was heartening to see hedges festooned with paper poppies or people showing up to demonstrate their support in small ceremonies such as a parade in London for the submariners' remembrance service.

We are in an age in which we are increasingly focused on personal interests and the self. We have lost the sense of that camaraderie. Ironically, it is the efforts of those who serve for the greater good that enable us to be ourselves and live the lives we want.

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I am writing this not for me, but to hopefully give you pause for thought of others who either never returned or returned broken in body and mind, but also for the families who lost so much.

If you get a chance, perhaps wear a poppy, visit a Remembrance Service this Sunday, a cenotaph service on the 11th, or even take the two minutes to reflect on service to the greater good. We owe it to those generations who gave their yesterday for our today.

In memoriam.

Cheers,
Julian

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Encouraging Flourishing

14 November, 2025

This week is a reflection on a conversation that I had with a brilliant mentor, my colleague Ali Khan.

In our discussion, we were exploring why people do not flourish in the workplace, which made me think about how we view the employees who work for us.

In my experience, I have found a disconnect in organizations between the organization's success and the roles people play in it. Success is usually defined by the numbers and rarely about the humans in the process. Often, organizations spend a lot of time focused on metrics, purchasing technology, and discussing approaches and technical processes.

While these are all valid, they leave out the human condition. Very few of our clients use robots to deliver value to customers: it is human connection and human work that adds value. A brilliant strategic plan goes nowhere if employees don't engage with it and bring it to life.

When the plan fails, we often blame it on the employees or, in other cases, we say the change management was wrong. While these may, in fact, be true, they are only factors. The core factor is the employee's efforts... the human factor. I would argue that, if it failed, we likely did not set up the "human factor" conditions to ensure success.

A case Ali made to me is that, when you consider a Brand that symbolizes the nature of a business, we think of it as the reason a customer connects with that brand. It's not the brand itself, however, but the experience they get from the employees. It is the employees who will personify your Brand, not the other way around.

Interestingly, while salaries are often the biggest financial expense, it is often not as big a factor as we assume for our people. Many CEOs believe that salary is the main (and often only) driver for employees. While this is certainly the case in some instances, we cannot make a blanket statement about what galvanizes our people.

The obvious issue is that the employees aren't homogeneous; everyone is different, so the overarching measure and approach for employees becomes whether they can actually flourish in the organization. The consideration here, though, is that just as employees aren't homogeneous in work and approach, they all have different needs and desires for flourishing.

This leads to the question of how you can ensure your employees prosper. There is one role in the organization that can do that and, while it is often handed to HR to enable flourishing, it is ultimately the managerial leader's responsibility.

In previous posts, I have suggested the golden rule of leadership is to *know your people and promote their welfare*. If you want to get the best out of your people, the key is your leadership. The need to know their people and what makes them tick, what their goals and desires are, and how they can grow in the organization.

Sure, detractors will say "*well, what do you do when their goals are not commensurate with the organization?"* The answer is they will have to leave. The alternative is to have them disengage, "retire

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in place", and then stay around for 30 years. You are doing nobody any good by keeping them around if they are not going to flourish. If they stay they will poison your brand.

While this a negative view, it comes back to what is necessary for humans to flourish and therefore be engaged in the business. Good managerial leadership is often the key. The adage that *employees don't leave organizations but instead leave bad managers* comes to mind as the a way to consider managerial leadership.

But there are other aspects and, while everyone is different, there are some basic human needs that have to be met. Growth and development comes to mind. While many people are fine with keeping their heads down and just doing the work, many others look for opportunities for growth and development and will languish without it.

The development of employees in some organizations is often an afterthought. As a former client of ours in HR opined: "*We spend millions on technology, but we are unwilling to spend funds on the development of our people"*.

In this missive, I can't hope to enumerate all the various elements of human flourishing. My friend Ali has conducted extensive research on the topic and developed a way to measure this in organizations through Shapepowered.com.

My point this week is perhaps it is time for us to shift the paradigm and realise that our success comes from employees who thrive in our organizations. When employees flourish at work, it drives success in the organization and creates a better world for all of us.

So this weekend, I recommend you pause and think about the employees as the key to your success and what you can do to help them, and in turn help yourself. Again, consider the axiom of knowing your people and promoting their welfare. I say this with the full knowledge that I have not necessarily gotten this right, but it's best to learn from the mistakes of others.

Have a great weekend.

Julian

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Conference Reflections

21 November, 2025

This week, I had the opportunity to attend Wounded Warriors Canada's second annual Western Canada First Responders Mental Health Conference in Calgary, Alberta. While I attend these conferences as Board member, I often feel out of place because I am not a first responder. However, I can find meaning and value in the presentations and discussions, and empathy for those who give so much for us.

At the same time, I often see parallels to non-first-responder communities and organizations. There were several takeaways that I feel are worth sharing for this week's message.

First, definitions are always key. The definition of “first responders” has grown over the 6 conferences we have held to date. The biggest takeaway is that it isn't just police, fire, and paramedics. In fact, we are now referring to it as all trauma-exposed professionals. The list of those who are included there now includes dispatchers, fisheries and oceans, coast guard, corrections officers, medical health care providers, journalists, and forest firefighters, to name a few, and the list keeps growing.

The definition includes anyone who is exposed to traumatic experiences in the completion of their duties at work. The purpose of our conferences is to share research insights and advise on the various services available. We at Wounded Warriors Canada continue to grow and provide services in the space originally focused on military and their families, but now encompassing public service personnel.

Understanding that definitions evolve is important in all spheres – we have to continue to adjust our thinking and approaches. We can’t remain static or risk alienating or missing key personnel or issues.

As for my other takeaways from this conference, I was struck by an issue that I heard from both attendees and presenters: the impact that their organizations have in compounding trauma. When people are not well cared for by the organization, and they become exposed to trauma, they end up with further injury.

Another area highlighted this year was the impact on families by Dr. Heidi Cramm from Queen's University. Heidi has been studying the impact of trauma on families where one or more parents are exposed to the trauma and they come home. I think we are finally, as a society, beginning to realise that we cannot extricate work from home life. COVID gave everyone a taste of the intermingling of both spheres when working from home. Now that people are returning to the office, the issue will hopefully still be seen as valid – as I like to say, you don't cut your head off and replace it with a work one or a home one when you walk through the door.

What I couldn't help but think about was the impact of both issues on managerial leadership. Perhaps I am that hammer that sees managerial leadership as a nail all the time, but it has an impact on the workplace and how people feel there.

As managerial leaders, how many times have we added confusion, angst, and acrimony to the workplace? I can say that throughout my career, I have added to the litany of issues employees face, whether in the business world or in the military.

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That said, it is going to happen; we, as managerial leaders, are not perfect, but it requires us to pause and consider how we have sown the seeds of worry and uncertainty. Reflection is a key tool in the managerial leader toolbox.

The family side is worth considering as well. Have I given enough thought and empathy to understanding the familial space because, after all, everyone has a family to greater or lesser degrees? Now, as a leader, I am not accountable for the family side, but I do need to consider it because it impacts those who work for and with me. From a humanistic standpoint, if I have created angst, confusion, and acrimony, I am not just affecting that one person but an entire ecosystem. If families are damaged in the process, it becomes a compounding factor in the performance of employees. Again, I just need to be aware of the impact that I have beyond the immediately obvious sphere.

Hopefully, I have given you food for thought and a different perspective. All of this adds to the efforts and elements that enable human flourishing. But I would be remiss if I didn't bring this all back to those public service personnel who are exposed to trauma in the work to protect, care, and support us every day. They and their families deserve our gratitude, acknowledgement, and support as they care for the greater good.

Have a great weekend.

Cheers,
Julian

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Team One and Team Two

28 November, 2025

For this week's missive, I am returning to a topic I have written about before over the last five years in Managing the Maelstrom, but seemed to come up time and again in discussions this week.

The topic is a simple construct of **Team One and Team Two**. While simple, when it is misunderstood or not followed it is the root of much dysfunction in organizations.

It starts with the realization that everyone who manages people in organizations live in two teams: Team One is our manager's team, and Team Two is our own team, for which we are accountable for the output and working behaviours of our people.

In managerial hierarchies (which most organizations are) these two teams require full alignment. Simplistically, the numbering suggests a hierarchy of importance. I need to be part of my manager's team first before I lead my own team. In effect, I have to be a follower first before I can be a leader. Unfortunately, most writings on leadership lean towards Team Two as first priority – how to be a great leader. But we can't be a leader unless we are aligned with our manager and peers; otherwise, to use a hockey analogy, we go on a breakaway. This is, in effect, a break from an organization's strategy, goals, and objectives.

When we lean heavily toward managing Team Two at the expense of aligning with Team One, we create the dreaded silo. It is therefore incumbent on our Team One leader to ensure we are aligned. This is often where it falls. We cannot solely rely on people's sense of personal responsibility (personal feelings of obligation) to align. They have to be held to account for alignment as well.

I find that many CEOs struggle to create alignment within their Team Two and don't invest the necessary energy to ensure it aligns with their own Team One. For a CEO, their Team One is the Board or Owners, which defines their actions. It is a tough job for a CEO to make the direction they receive from the governors clear. Sometimes they accidentally turn a blind eye to alignment, preferring not to rock the boat with their Team Two. However, like most managerial leadership practices, it needs to be modelled at the top.

Left to their own devices, an executive Team Two struggles with understanding what the governors expect and are often unable to align with those expectations. The CEO serves as the linking pin between the executive and the organization's overall direction.

For the Direct reports of the executive, their Team One is their executive and, therefore they, too, need to be aligned before they lead their Team Two, and so it goes on throughout the organization.

Some of the signs of an organization where Team Two is not laterally integrated with Team One are:

- Fights over resources
- Animosity between teams
- Missing goals and objectives
- A culture of blame
- Failing to achieve the strategy

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As a result, while it is the leader of Team One's responsibility and accountability to integrate them all, the team members must act as leaders and not side with Team Two at Team One's expense. Often, we see Team Two overpower Team One when issues bubble up and are not addressed by Team One's leaders. Instead, they prefer not to upset their own team and fail to lead for the greater good.

My final point on the importance of understanding the concept of Teams One and Two is to highlight how many times I hear from leaders that they thought they had alignment in their team, only to find out later that their employees have told Team Two, "*I didn't agree with this, but this is what the boss wants*…"

This is where understanding the nature of being aligned as part of Team One is critical.

In Team One, we debate and have our voices heard, but when we leave Team One, we leave the room as a united front. There can be no light between us. Part of this is the responsibility and accountability of Team One members, and part is the need for the Team One leader to ensure everyone is heard and to check that we are all in agreement. If the leader fails to do that, the strategy will be missed, and our successes will be fleeting.

To our American friends, have a happy Thanksgiving weekend with your friends and family, and hopefully this will renew everyone as they head back Monday to ensure Lateral Integration before Vertical Execution.

Cheers,
Julian

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Effective Lateral Integration

5 December, 2025

Last week, I set out a reminder of the importance of being a follower before being a leader. This model holds that your priority work is aligning with your manager's team, and your second priority is the team you lead.

Again, the premise is that any leader of people lives in two teams: Team One and Team Two. We must laterally integrate in Team One with our peers before we move to executing vertically in Team Two. Part of leading Team Two is ensuring they are also laterally integrated before they execute vertically so that the alignment cascades through the organization.

This week, I am going to revisit the elements that make up **effective lateral integration**.

The foundational principle of lateral integration is clarity. If our people are to exercise their judgement and discretion in Team Two to execute work, they need this clarity. In our experience, clarity is treated as a commodity, but we rarely take the time to provide it, assuming it is there. As a result, time and energy are wasted because of our desire to get on with things and a belief that there is speed gained with sorting it out as we go.

The first element of lateral integration based on clarity is ensuring that our people understand the scope and context of their work. The essence of this is providing the ‘why” and, in our research, managers are not very good at setting context and ensuring everyone is clear on the strategy. Sometimes, at the executive level, this requires taking the time to either articulate a clear strategy or to revisit and reiterate it. In our experience, while organizations have plans, very few take the time to be clear about the strategy – what the organization intends to be. In doing all of this, it is important to ensure that everyone on the team is on board with the strategy and the business's intentionality.

The next step is to define the work. Who is accountable for delivering the strategy, and what commensurate authority do they have to make the necessary decisions? This often takes the most time but, again, an ounce of prevention is worth a pound of cure. To properly integrate a team laterally, it is necessary to explain the interdependencies and cross-functional relationships required to deliver the work. In most organizations, the majority of work occurs laterally across teams, so it is necessary to define the interrelationships to ensure employees are not left to their own devices to complete the work.

The final step is often overlooked and is about defining the team's behaviours to ensure a common behavioural approach. It needs to start at the executive level and cascade down. Logically, it makes sense for us to define behaviour because everyone is unique and has different values and beliefs. If we leave the choice of how to behave to the individual, we get very different approaches, and those differences often become inefficient and ineffective. The team behaviours include how we plan laterally to ensure we have the support and resources for our work, as well as what we refer to as the “battle rhythm”. Battle rhythm is the cadence of meetings, when they occur, and what our expectations are for attendance and engagement.

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The final key to lateral integration is holding people accountable for the strategy work and for behaving in certain ways. All the energy can be wasted if you simply provide the direction and then walk away. It is a matter of holding people to account and applying both positive and negative consequence for how well they live it.

I wrote this for this week because now is prime for lateral integration, or for reinforcing it. 2026 is almost upon us so this is a great way to kick it off. With the return-to-office initiatives that seem to be cropping up for the new year, lateral integration activities are a great way to align your people and show the value of being back in the office. Finally, for organizations with a dispersed workforce, whether working from home or remotely, it is high time to ensure they are integrated with one another.

Hopefully, this has given you further fodder for thought as the year is nearing an end.

Cheers,
Julian

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What's In a Name?

12 December, 2025

What's in a name?

I have been meaning to write this week's topic for a while, and that is **the idea of titles**.

It is a pervasive topic that elicits a range of reactions and responses. When we work to improve organizational productivity and performance, titles are an issue that often get in the way and stymie common sense.

I believe that, as humans, we place a premium on titles. They represent where we come from and where we are now. They show our growth and trajectory and somehow represent us in a special way. We use titles to assess our own importance. Consider the person who title-surfs and stays only long enough as a Senior Director in a company before jumping to a Vice President job in another company. Or consider the employee who is always asking, "*How do I get to be a Senior Vice President? What is my path? How do I get my ticket punched?*"

The problem, however, is that titles often defy logic and rationality. In many cases, no one is really clear on what the difference is in the titles. Some are merely bands of pay, and for others they carry seismic importance and lead to access to the "executive washroom".

Some organisations use titles as a form of recognition, e.g. unable to provide a bonus, I will give you a title jump. In these cases, the titles lose meaning.

In other organisations titles form the foundations of castes and social norms, e.g. certain meetings are only for a title group, or Directors can't speak to Vice Presidents and must defer to them.

As a result of this wanton distribution of titles, you often end up with many layers in organisations that slow down the work. When we audit organisational structures, we assess the number of reporting relationships. The more layers, the less productivity, the more bureaucracy and greater micromanagement. When you have Associate Directors reporting to Directors who report to Senior Directors, you have gross inefficiency. It is amazing what you can find when you look at an organisation chart. When you see lots of different titles, you are often seeing a legacy structure and an overall reliance on hierarchy at the expense of agility, innovation, and effectiveness.

Most organisations only need 5 to 6 levels from top to bottom. But when you look at titles, you will find that they often have many more. I am always amazed when organisations acknowledge that titling is out of control, but then merely sigh and accept it as a fait accompli they can do nothing about.

Here is how to deal with the titling issue:

- Ascertain how many levels you need to deliver the strategy
- Define the work
- Clarify an understanding of what the levels mean
- Establish an understanding of what the levels represent in compensation

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- Create a new common set of titles that are void of caste relationships but are just about the work

Very few organisations go to the step of redefining titles. They are often unwilling to rip the bandage off and fix the problem for once and for all. The ones that do, however, tend to be much more efficient and effective. By focusing on the work instead of making a big deal about titles, they establish a foundation for trust and understanding.

Hopefully, this has given you food for thought as you look around your own organisation.

Cheers,
Julian

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Year in Review

19 December, 2025

This will be the last missive for 2025, and I will make it short. Next week, I plan to get into the holiday frame of mind.

As usual, I turn this year-in-review into an opportunity to reflect on the year that was. It certainly feels like 2025 was a year for the history books.

If I had to use one word to describe 2025, I think “uncertain” would sum it up the best. Right from January onwards, the year felt like it was going to be a wild ride. The wildness was reflected in the geopolitical dynamics and the national politics in North America and Europe. There was the rise of boisterous movements and a general feeling of uncertainty in all spheres.

While we didn’t see major swings in the markets, the uncertainty led to prolonged decision-making among some of our clients, who kicked the can down the road, waiting to see what would happen. If the years of the pandemic were volatile, uncertain, complex, and ambiguous, then 2025 was that and then some.

As the holidays are upon us, I recommend you take time to reflect on what 2025 meant to you. Consider it through these lenses:

- *What did I learn in 2025?*
- *What cool or new things did I do in 2025?*
- *How did I feel in 2025?*
- *What more do I know as a result of living through 2025?*
- *Who did I lose track of in 2025?*
- *What didn’t I do in 2025 that I likely should have?*
- *What gave me grief in 2025?*
- *What gave me joy in 2025?*

All of these are intended to set you up for 2026. Whether you believe in New Year’s resolutions or not it is always worth reflecting on what you might do differently going forward.

Have a great holiday and all the very best to you and those important to you. Let's all hope for more certainty going forward.

Cheers,
Julian

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