

2024

Managing the Maelstrom

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2023 Lessons Learned

5 January, 2024

Welcome to 2024. This is now the 4th year of writing this missive. This week, I thought I would do what so many others are doing at this time of year and review lessons learned from 2023.

I curated this list over the holidays. While they are not necessarily observations of just 2023, last year heightened them.

So, in the spirit of continuous improvement, here are my top ten observations:

1. **The Splintering of Society**. I mentioned this in the last missive. It was tangible during the height of COVID but became much more pronounced in 2023. Society broke into its lowest common denominators, and people chose sides. The splintering we saw is based on geography, ethnicity, and religion.
2. **The Preponderance of Psychological Operations**. In the military, "*PsyOps*" is a form of warfare that aims to influence another's state of mind, and we saw it play out heavily in the "shooting" or kinetic wars of 2023. But, it didn't stop there. Splintering fueled it and heightened a very basic sense of "us" and "them". Finding "grey areas" uncomfortable or unacceptable, we chose black or white, right or wrong, for or against. The media, primarily social media, were the purveyors of this psychological warfare.
3. **The Nature of unpredictability**. While not a feature solely of 2023, it reached new heights last year. We observed some of our clients respond unpredictably, even in the face of a logical and clear path of action.
4. **Decision Making**. 2023 saw an increase in the lack of decision-making. It links to the unpredictability noted above. 2023 was a particularly strong year for the "fear of risk". As a result of this fear, decisions were left in limbo or kicked down the road to wait and see what might transpire.
5. **The Stalling of Innovation**. This is a natural by-product of fear of risk tied to the lack of decision-making. New approaches felt stifled by the perceived safety of what we know and have already experienced. Of all the trends from 2023, this one scares me the most and does not bode well for our national economy.
6. **Tensions between Governance and Execution**. Again, this links together to decisions and innovation. With our clients, at least in 2023, there was more tension between these two key functions. This, in turn, left CEOs to straddle between the two, feeling settled in neither one nor the other.
7. **People "Living their Profiles".** At Forrest, we analyze the thinking styles of individuals and profile them. Last year, people demonstrated and stayed in their thinking preferences and did not stretch to use the various other styles. This impacted both decisions and innovation.
8. **Stress Reaction.** In 2023, we saw more people reacting to the stresses of their lives. Reacting is a term that reflects a range of emotional responses that burn energy to deal with stressors. I can say that burning energy was the case for me in December.

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9. **Failed Communications**. 2023 needed a new lesson in Communications 101. We saw so many cases of miscommunication that led to confusion and even anger. Whether it was a case of not taking the time to think through communications, leaving out pieces of information, or ignoring the need to communicate with others carefully, we need to get back to basics in interpersonal communications.
10. **Remember the Environment.** I used this with many of my clients challenged by the list of 9 above. 2023 was a tough year, and many struggled through the year's difficulties. I had to occasionally remind myself that there is much outside my sphere of control. Remembering this, and the importance of focusing on those areas where you have full control, is paramount.

As you may have noted, I have not explained the causes nor offered solutions but merely presented you with a list. The list reflects a need for us to change and, in the spirit of continuous improvement, look for ways to make things better.

I would love to hear if any of these observations resonate with you.

The list above is what I will remember and reflect on from 2023. 2024 allows us to address these items and consciously not allow them to infect the potential of a new year.

I wish you all the very best and to those important to you in 2024.

Cheers,
Julian

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Communication

12 January, 2024

Last week, I reflected on the top lessons I learned from 2023, so, this week, I will go deeper into one. One of the issues that came up last year was that we saw the basics of **communication** had fallen apart. The year was replete with miscommunication, causing trust issues, resentment, and anger.

I am not certain of the causes, but it was clear that we lost the intentionality of messaging while the amount of communication increased. It became a case of quantity over quality.

Part of the cause must be the sheer volume of communication and messaging confronting receivers. Take e-mail as an example; it took on epic proportions during the pandemic, and it hasn't let up. I believe the e-mail is also closely followed by instant messaging from corporate networking tools like Teams or Slack. There are many ways to send messages without engaging the recipient except to drop it in their inbox.

During COVID, this became an art form. People sent messages at all times, and schedules became packed as everyone was busy staying in touch. Additionally, online meetings increased as we all tried to keep in touch. With the working hours filled with meetings, the only time to review messages was late at night. Perhaps this is how productivity increased, but it became of life where one was "no longer working from home, but sleeping at the office".

Hybrid work in 2023 possibly continued the trend. However, the issue with this pace and cadence is that the deluge makes it hard for people to respond thoughtfully. People need time to think and plan, and with more things to react to, with little time to triage, there is no time to prepare to send messages.

A byproduct of all this overwhelming messaging was that people sent messages and believed they had done their part. Last year, I heard "Well, I told them once" a lot. The problem is that we assume they are solely focused on our message, however, they may not catch the message as intended in the melee of multiple communications.

Trust started to deteriorate because, with little time to prepare, context was often lost in the sent messaging. We could not ascertain intent when antiseptic words replaced nuance, and receivers of messages were left to use only one sense to gather information – sight by reading. Without being able to use all our senses to communicate, we must just read, and this limits understanding. Making this worse was a reluctance to speak to people by phone or face to face. It has been proven that the least effective way to communicate is by written word.

That was last year, and so not to drive through the rearview mirror in 2024, allow me to offer some thoughts for 2024 communications based on Bill Jensen's book **Simplicity**:

1. As the sender, you are accountable to ensure the receiver understands your message. This means no "fire and forget" messages. You must make sure they know your intent
2. Messages need to be user centred, we need to think about what is important to the receiver, and every message we send needs to include these three things; otherwise, it is useless to someone:

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a. **Know**. What specifically do they need to know? This means no dump of data but a distillation of relevant information, usually based on the context of why.
b. **Feel**. How do you want them to feel about the message? Emojis are a great invention, but ask if I want them excited, angry, or engaged.
c. **Do**. What specifically do you want them to do due to your message? This is critical. Too many messages are cc's and we know that cc is just a form of cya.

We have found these to be useful guidelines both in Forrest and with our clients and, if you take a moment, check over the next batch of e-mails or texts and see if they meet this framework.

I leave you with a quote from George Bernard Shaw that is a great reminder in our day-to-day lives: "*The single biggest problem in communication is the illusion that it has taken place*".

Have a great weekend.

Cheers,
Julian

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Lack of Decision Making

19 January, 2024

In my 2023 year-end review, I wrote of my ten lessons learned over the previous year. Last week was the nature of communication. This week, I will tackle **decision-making**, or the **lack of decisions** made both in 2023 and in organizations in general.

Decisions are fundamental to all human beings. We make them every day, all day. However, we at Forrest see and hear from our clients that decision-making in their organizations flounders. How can this be if decision-making is so ubiquitous?

Well, first, we make decisions often without thought based on ritual routine and the affective realm of our thinking, where we do it autonomously in many cases. If you wonder about this, ask someone to stop and tell you how they make decisions. In the vast majority of cases, in my experience, you get all sorts of answers, but they generally don't inform you of their process.

The stumbling through decisions is because we don't teach people how to make them. There are some basics like Mum and Dad teaching us right from wrong, or experience teaching us that putting our hand on a hot stove is a bad choice. Almost everything else is left for us to figure out. I believe part of this is that our education system teaches us *what* to think, not *how* to think.

Most people lack a framework for the decisions that they make. They rely on those old, tried, and true patterns. But what happens when your pay cheque is based on your choices? Suddenly, it takes on a new importance.

Generally, when we don't have a framework, we may not have confidence in our decisions. If we overcome that, the next issue is that, if we don't have a framework, how do we explain our choices to others? If we can't explain it, they lack confidence in our decisions, and if I get challenged because I can't show my thinking, perhaps I will be reluctant to put my neck out next time. The final issue of a lack of framework impacts organizations, and that is, whose decision is it anyway? In other words, is this my decision or yours?

The decision-making framework is essential to the problem at hand because of what decisions are. Most people define decisions as choices, and they are, but defining a decision as “making a choice” belies the complexity inherent in the process. I prefer the definition given to me by friend and mentor Jerry Rhodes: "*A decision is choosing one thing AND rejecting all others*."

Let that sink in for a moment. Yes, you make a choice, but the second part is you must reject all the other options; otherwise, it is not a decision. So, the complexity starts with choosing your aim and criteria, realizing your options, determining which relevant facts inform you about how well your options meet your criteria, and *then* deciding. In that process, you need to reject options, but the second part of decisions becomes very powerful because lurking there is the dasher of hope: **risk**.

Risk overshadows every decision we make. It overshadows the one choice and the rejection of the other choices. If you have ever wondered why your organization has so many priorities, it is because the spectre of risk overshadows and makes the selection of one priority over another frightening. It is

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because, as I like to say: "*unexplored risk becomes fear*". If we do not explore our risks, they fester, and they niggle away at our decision-making.

2023 was in no way an anomaly of decision-making. Perceived insecurity heightened it. That insecurity revolved around risk. Risk will always be there, and to quote the SAS, in some cases, "*who dares, wins*", so risk can be your friend and ally. But it requires thinking through the risk, which also needs a framework.

I like to keep the missives short, but if you would like the risk framework, please feel free to reach out. There is nothing risky in that choice.

Have a great weekend.

Julian

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Assessing Risk

26 January, 2024

Last week, I wrote about how decision-making had been absent in 2023 and provided a framework for making decisions in 2024. I left off the element of risk and said if anyone wanted to know more, they should reach out. I got many responses requesting that framework so I will share my perspective on risk this week.

Risk overshadows every decision and choice we make in life and, far too often, when we don't think through risk, it becomes fear. As I have said, "*unexplored risk becomes fear"*. So, if we want to overcome fear, we need to explore risk.

The word comes from the Latin *risco*, meaning chance, hazard, or peril. Every decision we make has a chance of going wrong and can be hazardous or perilous. So, as a result, risk is seen as a negative. Chance is often seen as just negative and fear-inducing. But sometimes, that chance can be good, and fear can be unfounded, so that it can be a positive, too.

In our efforts to deal with risk, we seek to reduce riskiness in our decisions as much as possible. We often:

- Rely heavily on data
- Depend on experience
- Find ways to reduce the chance of something negative happening

The problem with these courses of action is they can have consequences that we don't realize when trying to reduce the chance of something not going how we want. For example, we now have more data than at any other point in history, and we can get caught up in endless searches, black holes, or analysis paralysis.

In our dependence on experience, are we sure it is the right experience? Just because someone or something worked elsewhere doesn't mean it will work here. Also, in an era of quantum changes, is there any true “experience” anymore?

When we try to reduce the chance of something bad happening, we can have damaging side effects. This week, the Canadian Paediatric Society announced that our efforts to protect and bubble-wrap our children have had a negative knock-on effect of inducing fear and anxiety. In a sense, we have bubble-wrapped not only our kids but our whole society.

When we don't explore risk, and let it fester, it can seize up our decision-making. We fear making the step because of all that could go wrong.

Instead of inaction, we need to embrace risk and "think it through". Our process for doing that is rooted in the fact that we are trying to ensure that the dangerous doesn't come to life and, so, this is how we approach it:

1. Enumerate - what are all the worst things that can happen if you follow this course? Use your imagination and think of the absolute worst possible scenarios. Doing so makes the scary stuff real and visible, not just a ball of fear or knot in your stomach.

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2. Consider - what is the **likelihood** of this issue happening? Predict how realistic it is for your worst fear to come true.
3. Assess - what is the **severity** of the worst thing that could happen? Again, predict how bad it will really be if it happens.

Steps 2 and 3 require you to make a judgement call. There may be data to support your view, but you have to make a personal evaluation and make a call, just like you may make at a casino. Nothing is ever certain, but you need to explore it.

As a final point, once you have assessed the probability and severity, you can develop contingency plans to reduce the chance of those scenarios happening.

Weighting risk can help identify irrational thoughts or perceptions that fuel anxiety and fear. Recognizing and challenging these thoughts fosters a more rational and realistic perspective on the feared situation and allows for more considered evaluation. You can immediately dismiss some options that pose too great a risk or tweak your personal alarms.

In this way, you can explore risk, taking it out of those ephemeral scary dark corners and into the tangible light, where you can deal with it. There is enough to fear in our current world, so, having a way to deal with it is essential for survival.

Just note, one must be careful not to be overly cautious in the evaluation. In the end, making a decision, in any situation, requires a bit of a final leap of faith to commit. It's unlikely you'll ever come to a 100% "safe" option. Even stagnancy or status quo has its own risks.

I hope you will find this method useful as you face your daily choices.

Have a great weekend, and feel free to pass this on. Let's reduce angst and anxiety for 2024.

Cheers,
Julian

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Pushing for Role Clarity

2 February, 2024

I am changing direction this week and moving away from looking back at what happened in 2023 and looking forward into what is happening in 2024. This is at the request of a client who has found these missives useful, not for analyzing what happened, but for predicting and evaluating what we see now. So, here is my foray into observations of 2024.

First off, it feels like there is a sea change. The risk aversion and lack of decision-making in 2023 have made way for an action orientation in 2024. Many clients who were waiting to see what would happen have chosen now to set their own path. This is big and, hopefully, it will represent a new spirit in organizations and our nation. (I am speaking to a predominantly Canadian crowd).

What I have seen come up repeatedly lately is not just a recognition of a problem but a desire to solve it. That problem is what I term “role clarity”.

Role clarity is the term we at Forrest use to describe the vexatious problem of being certain of one’s role in the organization in relation to others in that organization.

As observation, when we, as human beings, are unclear on “who” we are in an organization, we behave to position ourselves amongst our peers and co-workers. Sometimes, this goes awry, and it becomes bad behaviour. In other cases, ideally, we try to resolve who we are within the machine of our organizations.

Some of the indicators of an organization that is struggling with this range from:

- Lots of meetings,
- Disengagement,
- Mistrust,
- Turf wars,
- Battles for resources, to
- Organizational sabotage

…to name a few.

I am a big proponent for trying to ascertain why things happen. (Sometimes that is valuable and, in other cases, it merely represents conjecture and navel gazing.) For those who want to understand a potential cause, however, I suggest you look no further than what we have gone through.

Covid has had, and is likely to continue to have, a profound effect and create changes as we move forward. When we evacuated our businesses in March 2020 we had no sense of what would happen in the long run. Pundits saw it as a glimpse into the future of work, and they may have been right. Regardless, it changed our relationship to work.

What changed was our interrelationship with our work and with others and, while we made do in the height of the pandemic in 2020, it feels like we did not reset when Covid ebbed. This explains the angst and issues that organizations face as they struggle, and continue to struggle, with returning to the office.

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Back to the more pragmatic, the real issue is that we see a lack of clarity on our work in countless cases and more frequently than before. Before Covid, we saw that employees needed clarification on what they were accountable for. Managers, in particular, were unsure of their role, and now, almost four years to the day, that has yet to get any clearer.

To compound it now, we are still determining whose job it is anyway. What tasks are we accountable for, and how do our tasks relate to others' roles? This is the crux of the issue of role clarity. We are making assumptions and, when we don't have clarity, we try to do our best to make sense of it all, but it leads to the list of issues above.

As a result, we see a new need to clarify the work in our clients. Hybrid work has not helped when we can't clarify and collaborate by quickly checking in with each other. Not to be on one side or the other of the debate, but I believe we have not perfected the "lean over the cubicle for clarity" in an age of technology where our schedules are tightly managed.

I look forward to your perspective on this but, if our experience is any indication, role clarity is a hot topic for 2024.

Cheers, and have a great weekend.
Julian

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Peace, Security, Prosperity

9 February, 2024

Often with the weekly missive, I'll write about an event that happened in the week that moved me enough to send out to you. While last week on Role Clarity got some great responses, this week is a very different tack.

I was introduced to an organization that is doing very important work that needs to be brought to greater attention. My good friend, Steve Gregory, introduced me to an international project that launched which is critical at this stage in our planet. The organization is **The Institute for Peace, Security and Prosperity**.

Our world is very dangerous. As the Consul General of one of the countries in attendance pointed out at the even, the prospect of war is far greater than we have faced on the planet in a very long time. The wars in Ukraine and Gaza get the news, but our media often overlooks the current conflicts in Africa. It may be because they are non-international actors at play in these conflicts. On top of this, the prospect of World War in the South China Sea, the Middle East and, of course, Europe hang over our heads. To add even to these, the nature of climate change has the potential to fuel even greater conflicts as the years go on. And not forgetting, close to home, the potential for civil war by various factions in the west looms everyday.

The intent here is not to create a litany of bad news but rather to explore the fact that we cannot put our heads in the sand and need to be aware and do something about the current world situation. It would seem to me that the Institute for Peace, Stability, and Prosperity has begun to do that.

The Institute's vision is that social, economic, cultural and technological prosperity can only be built on the basis of peace and security for all. Peace and security relies on the capacity to apply force to ensure justice, while safeguarding democracy and freedom.

Their model is to engage youth in understanding the nature of peace, stability, and prosperity. They do this by hosting an annual forum in Sicily for youth worldwide, where they come together and discuss the issues. What makes it even more unique is that academics, senior military officers, businesspeople, and non-government organizations are also in attendance.

For me, the addition of the military is critical. This is not just because of my background; soldiers understand better than anyone the impact of conflict and the need for stability to create prosperity.

The location is no mistake either. Steve has chosen it because it represents the location where allies and so many Canadians served to rid the world of fascism in 1943. It was, in fact, the oft-forgotten beginning of the liberation of Europe.

While we face dark days ahead, I believe the key is today's youth. We need to engage them and help them to understand that the service to humanity is far more important than the self and that they truly are the future of our world.

If you would like more information on the Institute, it can be found at https://psp-forum.org/. Their next forum will be in March. I hope this will have moved you to at least look them up.

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Have a great weekend.

Cheers,
Julian

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The Risk of Returning

16 February, 2024

Two weeks ago, I wrote about the importance of role clarity and how it has become a hot topic amongst our clients. This week, I will continue on a topic that continues to appear amongst our clients: the return to office.

Return to office has been an on-again, off-again topic since Covid ebbed. There are still many organizations wrestling with the issue. In many cases, senior leadership teams are still trying to determine if they can get their workforce back into the office for three days versus two days. Yet, in other areas, there are organizations that are completely back in the office full-time. I still am not sure why there is such diversity in approaches.

The fear continues that, if we push employees to return to the office, they will leave, and there are still attitudes that, if they are not at the office, they are not working.

It is true that some of the initial insights into productivity from home have been debunked and still other insights show that there is no real value to being back at the office. No wonder there is no clarity. It harkens back to the days of Covid where it was impossible to know what to do: do I mask or not mask? Do I get the vaccine or not?

There are many opinions out there, and at the same time, there is no real experience.

So what to do when you have conflicting opinions and no real experience to base decisions on? You have to rely on your thinking skills.

The return to office problem requires thinking through a risk assessment. If you call them back, there is a risk, and if you keep it up in the air looming over the workers, there is a risk.

Leaders in their roles have to be good at risk assessment and management. It is core to their roles in the business of work. The return to office dilemma is about risk assessment, but with risk assessment, a decision needs to follow.

No one will save you with the answer or proof of what to do; everyone is different and has differing opinions. You cannot negate risk. You have to manage it.

So, to manage the risk, you need to ask four questions:

1. What do you imagine are the worst things that will happen if we mandate a return or change to our existing policy?
2. What are the worst things that will happen if you maintain the status quo?
3. What is the probability that these will happen?
4. What is the severity of these happening?

The last two require you to predict and judge the likelihood and seriousness of the bad things happening. It requires a leader to make the call. You might find some data to help your deliberation, but it is highly unlikely that the data exists.

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So, be willing to make your prediction call and evaluate your best approach. Again, this is a call *you* need to make. When you explore these results, your next step is to build contingency plans to mitigate the likelihood and severity.

The subject of a return to office will continue to linger for all those organizations that have yet to return to the office space fully so, if you are in the predicament of making changes, you will need your best thinking. Still, it is all about risk and can be easily managed.

Have a great Family Day weekend.

Cheers,
Julian

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Productivity and Role Clarity

23 February, 2024

Two weeks ago, I wrote about the growing need for role clarity in organizations, and last week was about the ongoing return to office debate. This week will bring those all together through the lens of productivity.

Productivity is an ongoing issue in Canada. We lag substantially behind the other members of the G7, ahead of only Japan and behind most members of the G20. It is not a new issue but has continued to evolve. The problem of productivity is not new but has been getting progressively worse. The measure is the GDP per hour worked.

There have been many claims that working from home increases productivity, yet there are no solidly clear indicators that this is true. Most people feel they are working longer hours – so where is the productivity? According to The Canadian Chamber of Commerce, the barriers to our productivity are:

- Lack of skilled labour
- Supply Chain challenges thanks to distance
- The lack of competition, which includes business that only survives on government intervention
- The high proportion of small businesses

This week, my point is to show that there is a link between productivity, role clarity, and hybrid work. In our experience at Forrest & Company, role clarity is the cornerstone to enhancing productivity and enabling hybrid work. The Chamber of Commerce points are valid but there is something we can all do to help productivity.

Role clarity means that employees are clear on:

- What they are expected to produce
- Why they are to produce it
- How it relates to the Strategy of the organization
- What authority they have in their role
- What authority others have over their role

In our experience, employees' clarity on the above is, at best, 75%, which drops off rapidly from there. To compound the issue, hybrid work or working from home has only exacerbated the situation. Management wasn't driven to provide clarity before and, while some have done a great job of improving this clarity in the COVID and post-COVID era, the majority have not. If they had, it would not be consistently listed as a pain point in our surveys of clients.

Role clarity requires effort and planning. It is more difficult when you can't wander down the hall and provide clarity to one person, let alone get a team together to explain how their work intersects. This is why the hybrid model is becoming even more difficult.

If you suspect my assertion that employees lack role clarity, consider these markers and ask yourself if you have seen these issues come up:

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- Everyone is in meetings
- Decisions are not made
- Silos grow
- Plans are fought over for resourcing rights
- Acrimony has built up between teams and individuals
- We aren't hitting goals

The answer, I believe, is role clarity, but that is only the first step. It requires management to hold their people accountable for the newly clarified work, which is where it also falls.

In my book, I argue that we need a professional management disposition. Managerial Leadership is the most common role in every organization, yet we see it as something other than a profession in itself, choosing instead to be rank amateurs. Productivity isn't the employee's issue; it falls at the feet of management. You can't blame employees for wanting to work from home, and you certainly can't blame them for being unclear on the work you are paying them to do. You *can* blame management for not setting them up for success.

Canadians don't want to be last at anything, so, hopefully, we will take our lack of productivity as a nation seriously and step up for the greater good.

I, for one, do not want to see us fall behind, and it is within all of us to succeed, so we need to get on with it. Productivity is within our grasp, and it starts with Role Clarity.

Have a great weekend.
Julian

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A Productivity Revelation

1 March, 2024

This week, I realized I have made a mistake. I have been wrong, and it has cost me umpteen energy and effort.

The last three weeks' missives were about returning to the office, role clarity, and productivity. In my preparation for this week, I was exploring the issue of productivity, and then it hit me, thanks to AI.

I was one of the adventuresome ones who decided to try Google and see what it would give me on the topic of productivity, especially now that it is super-charged with AI. I was gobsmacked. The list of issues Google created around productivity mirrored Forrest & Company's research on organizational pain.

If we compare the two lists, employees have been pointing out that there have been concerns about productivity for almost a decade.

Here are the pain points we identified through client surveys:

- Overloaded, i.e. too much work
- Managerial ineffectiveness
- Unproductive meetings
- Lack of decision-making
- Resource squabbles
- Moribund in process and systems
- No innovation
- Ineffectiveness
- Poor strategy and implementation
- Lack of talent
- Acrimony – in-fighting

The most interesting thing about this list is that it virtually mirrors what Google listed as challenges to productivity (if you claim Google as a source). In other words, while we may have gathered the data and told our clients that the root cause of the listed issues was role clarity, they somehow missed it. The message wasn't getting through. This is where I realized I had made a huge mistake. I have been trying to convince CEOs that they had a role clarity issue, and they seriously doubted me. "*How could our employees be unclear*?" was the common retort.

The issue was a classic "feature vs. benefit" trap. **The clear answer is – the feature and the value are role clarity, but the real benefit is productivity.**

To be clear, some CEOs get it, but many don't understand why role clarity is so important. To be fair, who would believe that their employees weren't sure what to do; after all, they are making money.

The point is that, in reality, role clarity is a feature, but the true benefit to organizations is productivity. In other words, role clarity is key to producing goods or services more efficiently.

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My point last week was that we as a nation are at a deficit in production and getting things done. The Western world as a whole is in the same boat, but indicators show Canada lagging.

So, what is this productivity, and is there a solution?

I have argued extensively in these missives and my book that the core to productivity is not just role clarity but its overarching foundation – accountability.

Accountability is different from responsibility. Accountability is the relationship between a manager and a direct report. A manager holds a direct report to account for the delivery of a product (a thing, an effort, etc.). Responsibility is intrinsic to the individual, for it is their internal feeling of obligation. They are distinct, and accountability defines the productivity required, whereas responsibility is the engine that drives the action.

So, the foundation of productivity is accountability, and the key to that is role clarity. Clarity of expectation comes from role clarity, which is driven by holding someone accountable. The ability to deliver on that productivity comes from responsibility that directs the internal energy of the employee. But all of this is secondary: the foundation is role clarity.

The danger and lack of productivity come when we get the order reversed. It comes from not holding our managers accountable to ensure that the role clarity and expectations are clear. How can I know if you don't tell me where to direct my energies?

If you want productivity, then make sure there is role clarity and that you are holding people accountable. In particular, ensure that from your leaders before you look at your employees.

So, the issue may be role clarity, but the benefit is productivity. My lesson for the week.

Cheers,
Julian

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Overwhelm & Productivity

8 March, 2024

This week, I return to the issue of **productivity**. It has been the topic of several weeks, and last week was all about my eureka moment when it hit me that one of the root causes of poor productivity was poor role clarity.

It is no coincidence that, at the same time, our clients struggle with employees' understanding of their roles, and there is a major shortfall in productivity.

This week, I realized an interesting tension in focusing on productivity. While productivity is necessary at a strategic level and critical for Boards, C-suites, and senior management, how does it relate to the workforce or the employees? Employees need role clarity to be more productive. They crave clarity, but they don't necessarily crave working any harder than they do now.

Our research has shown that employees feel overwhelmed with work already. So, if we make productivity our new mantra, does that mean they must work harder? In surveys, whether in COVID or this new hybrid era, employees repeatedly point out that they feel like they are drowning in work. This feeling extends to the rank and file as well as CEOs. Time does not increase; the day adds no more hours. If we aren't to add more work, what is the relationship between role clarity and productivity?

The answer, I believe, rests in the old phrase, "*Work smarter, not harder*."

Role clarity is the opportunity to rethink the work being done. I have always said organizations are hoarders – we naturally hoard work and resist changes. Role clarity provides the chance to define the work that should be done, not defining the work that is being done. Role clarity offers the opportunity to question and challenge those sacred processes, policies, and activities to enable people to think smarter about their work.

Sounds great, right? Well, then, why when organizations know they have to fix it they don't do it?

Part of it is the "tyranny of do", and the other is that it is a risk.

The "tyranny of do" is the desire to keep going, not pausing to think or taking time away from doing things. We have a natural propensity to keep going, and we see thinking and clarifying work as unnecessary. Many CEOs want to believe their employees know what to do and will naturally find ways to reduce unnecessary work. This is a pipe dream because they, too, suffer from the "tyranny of do" – they keep working at it. They aren't being smarter, and the worst culprit is management, who don't drive for clarity of roles and continuous improvement.

The other reason is risk. The fear factor kicks in that somehow clarifying work rather than just doing work is risky. What if we get it wrong? What if we stop doing that one thing? Perhaps we really need to do it? You are right; if this is looking at all familiar, why we don't set priorities? The two are interrelated.

So, if you read between the lines, managerial leadership is the culprit in the need for more role clarity and productivity. Organizations take their cadence and direction from management. Role clarity comes from the manager, and a drive to productivity comes from management, not the employees. If we seek

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a solution, it is about getting management engaged in the two issues. If you do this, you get the productivity you need, and just as importantly, employees can flourish in their work.

For next week I will be away with my family so no missive. For those that are taking the time have a great one. All the very best to you and your family.

Cheers,
Julian

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Supporting Women Beyond IWD

22 March, 2024

I took a week off from the missive while on vacation with my family. That gave me plenty of opportunity to consider what the upcoming missives might include.

Recent topics were all variations on productivity or how to get better productivity through clarity of work. This week's differs in that it's a reflection on something that happened two weeks ago.

The last missive came out on March 8th. On that day, social media was overrun with stories celebrating International Women's Day. As I write this a mere two weeks later, there is no mention of it in any media and it has already run its course.

So, this is my take on International Women's Day. If it is such an important day and issue, why aren't women championed every day?

It has been over 100 years since the first IWD, and yet women are still not treated as equals around the world. I noted that the UN Secretary-General stated this year, "*at our current rate legal equality, it is 300 years away*."

300 years.

In our world, women and girls are marginalized and, worse, physically threatened by male-dominated systems and beliefs. While the North American experience is improving, much remains to be done. After all, the gender wage gap in Canada is still 16%.

The fact that every day isn't IWD reflects just how importantly we treat it. Instead of being at the forefront of our minds every day, it gets relegated to one day where politicians, marketers, and spin doctors say their piece, check the box and move onto the next virtue signalling event.

Sure, we have March as Women's History Month, but it is about history, not the path forward. On top of that, it is crowded with Irish History Month, National Nutrition Month, Stress Awareness Month, and even National Umbrella Month.

One day of acknowledgement of how important we see equal pay or inclusivity for women does not turn the tide. I could go into the statistics of the (lack of the) number of women in governance, executive teams, or certain businesses, but pontificating about it once a year doesn't make it happen.

The cynic in me sees that this approach is only about marketing and doing what all the others do. It is a corporate version of keeping up with the Joneses. It is the parsley on the dinner plate; we must because it is expected, and it's a flourish. But, do we do it is it for the right reasons?

Actions speak louder than words. We need a world of actions, not just rhetoric and messaging. The same goes for any other injustices that need to be righted. They require us to develop plans and then implement them. As with any business change effort, it has to be demonstrated and cascaded down from the highest leadership levels. The army quotes, "*Lead by Example*" and "*Never Pass a Fault*" apply here. Senior leadership must, as with role clarity or other initiatives, hold their managerial leaders accountable for progress and implementation.

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If you are like me, you are probably tired of empty messages. We send many, but how can we make them heard? It is through discipline and vigilance. We need to step up and call it out. To all my male readers, our allied voice must be loud because it is what is right, not about creating impressions of righteousness.

So, ask yourself, what has my organization done in the last two weeks to promote the issue of women and girls for our organization, society, and the world? From a fully pragmatic perspective, this has business implications from effectiveness, efficiency, and trust, as well as reputational risk.

Let's not leave it to the *one-and-done* day but make International Women's Day every day so we don't have to wait 300 years for equality.

Cheers,
Julian

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Take a Pause

29 March, 2024

This week's missive will be shorter than most. You are receiving this today as tomorrow is a holiday for many, and so you can read this and then disconnect from work and reflect.

Regardless of your circumstances, this long weekend marks a significant shift in the Northern Hemisphere, transitioning us from the bleak days of winter to the vibrant season of spring and renewal. It's a time of personal growth and rejuvenation, a chance to emerge from the hibernation of winter and embrace the start of a new cycle.

If you are paying attention, you can see the signs everywhere. For example, birds are singing a different tune, trees are budding, and shoots are appearing. The daylight hours are increasing. But again, you must pay attention.

Too many of us are locked in the future or the past, but not the here and now. Future thinking is about the email inbox, upcoming meetings, or even the dread of future events around the corner. The past is all about what I am comparing my current world against, and its extremes are regrets for things either done or not done.

My message this week is to seize the opportunity to be fully present. Pause the chaos of modern life for a moment and immerse yourself in the immediacy of the moment, both for your own sake and for the sake of those around you.

We exist in a society built on relationships. As human beings, we thrive on connection. Yet, when we're consumed by thoughts of the future or dwelling on the past, we risk losing sight of the people who matter most. This long weekend, a time often reserved for gathering with loved ones, presents a precious opportunity to nurture and cherish those relationships.

I advise you this weekend to take the opportunity to focus and recharge your batteries. The inbox will be there next week, and the dread of the future can be put off. The regrets of the past will also drift away, but be with yourself and those who give you energy for the upcoming season.

I will take my own advice and recommend you do the same.

Have a great long weekend, and all the very best to you and those you hold dear.

Cheers, Steadfast, Vigilant, and Adaptable .
Julian

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The Nature of Executive Coaching

5 April, 2024

Welcome to April. We're back focusing on the nature of work and a frequent discussion point from our clients: **the nature of Executive Coaching**.

The question this week was, what does it mean?

Executive coaching has recently become a cottage industry. The proliferation of people calling themselves coaches is huge, so I will explore what coaching is about.

Forrest defines coaching as assisting individual clients in reaching their goals by helping to enhance their performance. There is a nuance here, however. When we say their goals, it must be within the organization's context. Their goals should be related directly to their work and the client's role in the organization.

The nuance here is that the client being coached must *want* the coaching. So, in that sense, their goals have to be linked with the organization's goals, but they pre-eminently must want it; otherwise, there is no forward movement.

After all, coaching is moving from a current state to a future-desired end state.

Coaching is about asking questions to launch the thinking of the client. It is also on a spectrum. On the one hand, there is life coaching, which is very popular through self-help books and the like. On the other hand is consultative coaching. Consultative coaching is where the coach will ask questions but has models, processes, and tools to help the client. Life Coaching usually has the organization as an afterthought to the person being coached. This form of coaching has the danger of very quickly getting into the realm of therapy, which is different from what coaching is about.

In the coaching world, there are those who are coached without reference to the organization. However, true accountability to coach the individual rests with the manager, and the executive coach should never supplant that relationship. Far too often, however, organizations are paying for coaching that has no relation to the business.

Sometimes, circumstances exist where the manager is unable or unwilling to provide coaching. This is where Forrest coaching comes into play. An external coach needs to have a skill set that adds value to the client being coached. By the same token, the manager may not have the bandwidth or time to coach and, here, an external coach becomes important; in effect, they become a force multiplier for the manager. The unwillingness of a manager to coach is a sad statement on the relationship, and it speaks to poor managerial leadership.

Therefore, the best coaching is in conjunction with the manager. In our business model of coaching, we refer to the manager as the *customer* of the coaching, whereas the individual being coached is the *client*. There is a key balance here because, for the coaching to be effective, the client must trust their coach so that they can open up. This is one of the toughest spots for the coach, and the best coaches carefully tread the line of feedback to the manager and client confidentiality. We manage that tension

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by encouraging the client to be open with their manager on what they are learning and how they are growing due to the coaching.

The other tension for the coach is not to fall victim to what I like to call a form of Stockholm Syndrome. In this case, the coach relates to their client in such a way that they are no longer challenging their client, but instead falling into their client's mindset.

This week is just a starter on the nature of coaching, particularly executive coaching. Depending on the feedback, I can delve deeper into the types of coaching and some of our observations on the business of executive coaching.

I look forward to your thoughts and comments on coaching over the weeks to come.

Have a great weekend.

Cheers,
Julian

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Types of Coaching

12 April, 2024

Many thanks to all those who responded to last week's missive. This week, I am continuing on the same topic and further exploring **the nature of coaching.**

Coaching is about helping someone move from a current state to a future desired end state. That future state is about a change in performance. The key is change.

There is another cottage industry around change, namely change management and change leadership, but coaching is about effecting a change in the individual. As I said last week, it is essential that the coaching client is willing to and wants to change. This remains true even though business coaching has to be tied to the work and strategy of the organization. Coaching is only effective if the client is willing to try. In my experience, there have been too many cases where clients have said they want to change but really don't.

Paradoxically, there is a tension between where we are now and where we want to be. That paradox creates tension, and that tension seeks resolution. Think of a stretched elastic band: if the desired state is too far, the band snaps, and we return to stasis; if there are no tensions, there is no urge to pull forward to a new state and we find stasis again. The trick is to get it just right.

Therefore, the essence of coaching for performance must start at the future state. Defining the goal for coaching becomes the most important and is often the hardest to do. The client doesn't necessarily know; the manager or customer often doesn't know, so there is a whole dance of coaching to coax out the goal.

With the goal established, coaching for performance falls into three types. These are what we refer to as the streams that feed the coaching. Every engagement has all three, but they are important to understand.

- **Consultative coaching** relies on the coach's expertise to provide insight to the client around specific concepts, models, processes, and systems to help them in their work.
- **Sounding-board coaching** is a type of coaching that relies on the coach being present, listening, and helping the client explore and revisit issues for learning. It involves examining the day's events and providing an opportunity for the client to reflect.
- **Coaching for improvement** is the stream of coaching that is usually identified upfront with the customer/manager. These are usually interferences getting in the way of the client's potential. However, as a coaching relationship develops, there will be opportunities for the client to seek to improve their performance by removing specific interferences.

In my experience with CEOs and senior executives, the most valuable type of coaching for them is when the coach is the sounding board. At senior levels, we don't have anyone to talk to and explore events with.

As an aside, I counsel my clients that, no matter what relationship they have with their spouse/significant other, they should avoid relying on their partner as, or turning their partner into, a

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sounding board coach. Sharing your frustrations can seem momentarily cathartic, but often burdens your partner unnecessarily if it is done often. Venting in the moment shares a snapshot but can limit usefulness in reflection/getting feedback as your partner only hears the immediate issue you are sharing, but may never get follow-up or resolution from you. The benefit of using the coach is the longer term strategic discussions with a holistic view to the issues. It is lonely at the top, and a good coach's power is to be that non-judgemental sounding board who brings different models and frameworks to bear if need be, or to be there just to listen.

There is much more to this topic, and if the interest is still there next week, I will continue the exploration. Have a great weekend!

Cheers,
Julian

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Selecting a Coach

19 April, 2024

This week, I am continuing the discussion on coaching. The point about ‘sounding board’ coaching resonated with a number of clients, and this will be our jumping-off point.

The question came up that, if sounding board coaching is useful, then how do you, as a client, select a coach?

The selection of a coach is key. There has to be a fit between the client and coach. The client has to be challenged through questions, and a light must be shed upon them by the coach. There must be an affinity between the two. Trust becomes key for the coaching to work, and in addition, there is risk.

There is always risk in coaching. The risks for the customer (the manager) are:

- Will this coach steer my direct report in the wrong direction?
- Can this coach handle the complexity of our work and issues?
- Will this coach really be able to add value and help achieve our goals?

From the standpoint of the client (the person being coached) the risks are:

- Can I trust this coach to keep confidences?
- Can I connect with this coach?
- Can this coach add value and help me achieve my goals?

So, how do you mitigate the risks? Again, the key is careful coach selection.

Immediate experience is often appealing but, it can be a double-edged sword. If coaching is about change, perhaps there are better choices than being coached by someone directly involved with the business. I say this because the coaching industry is replete with examples of individuals who have hung up their skates in an organization and then come back to act as a coach. While coming from the sector and type of business helps to create a common language, in our experience, it has not been the sole source of success.

In fact, coaches with no experience in a particular field have often successfully coached clients precisely because they haven't come from that field. A coach with extensive experience in an area can often overwhelm the client with "do this" and "don't do this" coaching, which does nothing for the client's development and can stultify growth.

Where the experience is truly handy is the multi-faceted experience of different businesses and industries to provide choices of frameworks and processes. That said, sometimes consultative coaching benefits from a coach with specific experience.

A coach must have the cognitive capacity to keep up with the client. There will be details they cannot possibly know, but they have to be able to listen to what the client says, extrapolate, and take the conversation to a place where the client gets insight. I call this listening around corners – not just able to see a point around a corner but able to listen and connect the dots.

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To do this, though, a coach needs tried-and-true frameworks. Their thinking needs to be legitimate, reducing the risks above. For us, at Forrest, we have two science-based approaches and our own coaching philosophy, also based on science.

Finally, the key to reducing risk in the selection of a coach is reputation. As with hiring any talent, look to the references and reputation of the individual or the coaching firm.

The industry has too many examples of individuals who sell themselves as coaches. Not doing your homework when selecting a coach carries real risk—to the individual client, the organization, and even the organization's reputation.

So, buyer beware. Coaching is a force multiplier but not well thought through, and without a framework, it can be risky.

Have a great weekend. Steadfast, Vigilant and Optimistic
Julian

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The Nature of Coaching Engagements

26 April, 2024

Welcome to another spring-time missive. I am continuing my exploration of coaching. This week, I am looking into **the nature of a coaching engagement**.

Every coaching engagement has three elements. Whether consultative, sounding board, or coaching for improvement, they all involve awareness, choices, and decisions at some point.

Awareness
One of the coach's roles is to shine a light on the client to make them aware of how they are perceived and are coming across. As I say, no one walks around with a mirror in front of their face. We often need that self-reflective mirror and a great coach should help with this.

Choices
The coach has to help the client to identify the choices they have for new approaches to how they work. The coach's role is to help the individual make the choices themselves, not steer them to some “right answer”. Hence, the coach must have a philosophy, models, and frameworks ready to deploy. The point of choices is to open the client's mind to possibilities and ideas to help them explore new ways of looking at their world.

Decisions
The decision element is not just to help a client choose one thing and reject all others, but also to be confident in their decisions. The client learning to trust their judgement is critical when creating change because it enables the individual to enact the choices they have made and provides a stick-to-it-iveness. Decision-making is not something we are taught in school. People make decisions in a variety of ways, but if they have no framework to make their decisions, their confidence may lag, or they may become belligerent in their choices. Therefore, the coach must have a decision framework ready to support the client.

Coaching has all these elements but, often, a coaching engagement emphasizes one of these three over the others. For us, at Forrest, this helps us identify which of our coaches is best for a given engagement. Does the individual need a dose of self-awareness? Do they need paradigms or models to round out their experience? Or do they need to feel more confident in their role?

Using all three of these elements enhances performance but also, and more importantly, sets the stage for change. The key, though, is that the coach must see it from the standpoint of development rather than solving a particular problem. To use the overused analogy, it is teaching the client to fish. After all, it is what they do after the coach leaves that is most important.

Have a great spring weekend.

Cheers,
Julian

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Coaching & The Manager

3 May, 2024

This week, I will continue exploring the nature of coaching in organizations. Several weeks ago, I mentioned the role of one's manager in the coaching engagement.

There are many cases where the person to be coached selects and engages a coach on their own. We see this a lot and, as a result, the organization has no insight into or understanding of the coaching aims and goals, or even the return on investment for the coaching.

Philosophically, Forrest & Company sees performance coaching as an extension of managerial leadership. With that is the belief that the manager is the individual's primary coach. This belief comes from our laser focus on the idea of accountability. We define accountability as where a manager determines the expectations for an employee and then holds them to account to deliver that through positive and negative consequences. This is different from responsibility, which is an employee's subjective, personal feeling of obligation.

It's not uncommon for organizations to shift the responsibility of coaching onto employees, even suggesting that they find their own coach. However, this approach is a failure of management's accountability. Holding someone accountable also means that the manager is accountable for the growth and development of their direct reports. It's not about delegating this responsibility to a third party, but about the manager taking an active role in their employees' development.

Given this definition of accountability, and the accountability of a manager to develop their direct reports, here are what we see as the conditions when a manager should consider an external coach to support the growth of their employee:

- A need to develop a specific skill that may be outside the manager's purview to teach
- Provide a sounding board to assist an employee in exploring the nature of their work
- Focussed development over a period of time to overcome interference to the potential of the employee

Many times, coaching is undertaken to solve a problem that has arisen because the manager has not fulfilled in their mandate to develop their employees. Far too often, managers are willing to have someone else fix an issue, and this should not be the foundation of the coaching engagement. If it is a case of improving an employee’s performance, there is a big risk of sliding back to old ways, without managerial sustainment. To solve this the manager needs to be coached first. Therefore, in our coaching practice, we work with the manager to help them articulate what they want the employee to work on. The core issue of defining employees' developmental needs is rooted in clarifying expectations. Clarifying expectations is the essence of accountability.

The steps to this are:

- The coach meets with the manager and establishes the goals
- The coach, manager, and coaching client then meet to confirm the goals
- The coaching begins

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- At a midpoint, the manager, coach, and client meet to discuss and confirm the progress
- At the end of the engagement, the three meet again to either extend coaching or hand off the relationship and establish sustaining practices for both the client and the manager

Coaching without the manager's engagement is an abrogation of accountability. When the manager is also not engaged, are you sure what you are paying for?

Have a great official spring weekend.

Vigilant, steadfast optimistic, and adaptable,
Julian

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Coaching & Thinking

10 May, 2024

Welcome to another weekly missive. The topic of the past few weeks has been an ongoing theme around coaching, which I will bring to a close today.

I recently had a question about the most important things a Coach does for their Client. I have talked about creating awareness, choices, and trust in self, which are often key elements to enhance performance. Knowing what to do and having the confidence to implement it are key. While awareness is important, a Coach doesn't have a chance to see their Client as others do. So, it is important for a Coach to help their Client see choices and trust that they can implement them.

An effective Coach brings and uses models and frameworks to help their Client. This helps the Client see opportunities and explore different ways to do things. Again, the root of coaching is to help create change. So, a Coach needs to be able to bring options for change.

The other trick here, as well, is to be able to help the Client to see and evaluate the choices in front of them. The best way to do that is through questions. When we ask a question, we prompt people to think. So, having a good set of questions, and knowing which ones to ask and when, is an essential tool in the Coach's belt.

In a way, the essence of coaching is helping people think differently. Thinking launches thoughts or conclusions that we reach, and then those conclusions become behaviours. You can't get to behaviours by just behaving differently; it is unsustainable. You must think differently.

At Forrest & Company, our coaches are trained to help people with this active thinking and, as many of you know, we use Effective Intelligence to do this, using a set of thinking frameworks to help clients.

The most common framework is the decision-making process. Strangely, while we make decisions all day, very few of us have ever been taught how to decide. As a result, we rely on our gut, instinct, and experience to make our choices. *Am I confident in my decisions if I don't have a framework to rely on? Or are others confident in my choices if I can't show them my thinking? Furthermore, if I rely solely on my experience, is it valid in this circumstance, or will I get the same result and, therefore, effect no change?*

Other thinking frameworks that people often need help with are:

- Planning
- Persuading others
- Creating new approaches
- Solving problems
- Learning new ways
- Communicating

Thinking is the foundation of our diversity, and everyone approaches it differently. The key to coaching is to have frameworks that can help improve performance, efficiency, and effectiveness.

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The Coach needs to teach their Client “to fish” and not just provide them with the solution. This is essential to sustainable change. A framework improves our confidence and enables us to repeat success. With every successful repetition and practical application, our confidence grows.

So, when considering a coach, make sure the question is asked: How will you help me think differently? If there is no answer, then a path to change will be that much harder.

Have a great weekend. Steadfast, vigilant, adaptable, and optimistic.
Julian

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Managing with Empathy

17 May, 2024

After many weeks focused on coaching, I am returning to a reflection on events of the past week.

I had the opportunity to take part in the second annual Ontario First Responders' Mental Health Conference. I was there because we at Wounded Warriors Canada (an organization of which I am Vice-Chair) hosted the conference in conjunction with Trillium Health Partners.

The conference sold out very quickly, with over three hundred people on the waiting list. I mention that because it reflects the state of mental wellness in the first responder community in Ontario, and the large number of people invested and interested in learning how better to support mental health within this space. Participants came to hear the latest techniques in battling the tough fight for first responders and uniformed services in general.

There is a common thread amongst police, fire, EMS, corrections, and the military that trauma has a huge impact on mental well-being and not just physical wellness.

One of the keynote speakers was Commissioner Tom Carrique, Commissioner of the Ontario Provincial Police. He told a personal anecdote about a circumstance that impacts all leaders, whether First Responders or not. His story related how one of his team had lost his four-year-old child. When he asked the immediate supervisor if he should reach out, he was told "no" and that the constable was working through it. It wasn't until the constable's wife called him out that the realization dawned on him.

His story hit home for me as a reminder of all the times, as a leader, I had waited and not engaged someone who was obviously in distress from losing a job, a loved one, or any form of personal anguish. It got me to think about how we, as leaders, need to be courageous and take the risk of initially alienating someone by engaging them at that awkward time.

At its root, it is really about leaders engaging with their people, stepping out of their comfort zone, and being very real and human with them. It is about taking the risk where it hangs in the balance. It is about living with being comfortable in our discomfort, stepping outside of ourselves to be there for others, no matter how shy we may be.

The corollary to this is something I wrote about in my book, and that is the phenomenon of "sanctuary trauma," where first responders face trauma one moment but then expect sanctuary in the workplace only to find that they are ignored, overlooked and forgotten by their leaders.

You don't have to face trauma to be traumatized by being overlooked or forgotten by your leaders. As people live in a hybrid work environment, the chance of being overlooked gets much stronger and, if you add to that leadership who are cautious or shy to engage, that creates a very negative work environment.

You also don’t have to wait for an “event” to check in with your people and take their mental temperature. Psychological safety in the workplace is just as important as physical safety. Empathy increases trust, communication, and a sense of worth. We are all human, and we need connection with

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others. As a leader, you don't have to be a psychologist to figure out what to do. What would be good for you? What would you prefer from your boss? It is often very much the same for others.

Sure, the moment may not be exactly right, but over time, your people will appreciate that you treated them fairly and cared for them. It is far better than them thinking that you don't care at all.

Hopefully, this has given you food for thought. I will take a break next week because I will be at the Humanity 2.0 conference in the Vatican to learn how humanity can flourish. Watch this space in two weeks, and you will get my insights.

Have a great long weekend.
Julian

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Flourishing and AI

31 May, 2024

I was on hiatus from my weekly missive last week. As I mentioned the week before, I was attending the Humanity 2.0 Conference at the Pontifical Academy of Science, inside the Vatican in Rome.

This is my sixth year being involved and our fourth conference. Humanity 2.0 is a vehicle for facilitating collaborative ventures between the traditionally siloed public, private, and faith-based sectors. Its mission is to identify impediments to human flourishing, and then work collaboratively across sectors to remove them by sourcing and scaling bold and innovative solutions.

As you will have noticed over the years in these missives, I have referred to human flourishing as an international movement. This year's conference brought academics, technology experts, and business leaders together to discuss integrating emerging technologies and advancing the good of humanity.

Even now, a week after the conference, I am still trying to interpret and digest what I learned. There were so many discussions and perspectives from the over sixty attendees that it is impossible to innumerate them in this short missive.

Key to this year's conference, however, was the unveiling to the group of the efforts of academics and theologians of the proposed model for human flourishing that has been worked on for the last eighteen months.

The model is essential for two reasons. First, many groups discuss the notion of flourishing, but lack a common definition. The second is that the model must be as universal as possible to encompass everyone from the towers of Manhattan to the slums of Kolkata.

Only with a common model can we identify the impediments to flourishing. This is the work yet to be done.

This year's conference focused on the implications of Artificial Intelligence on human flourishing. As Artificial Generative Intelligence becomes more prevalent and powerful, a common model can help us assess if the AI is enhancing or threatening human flourishing.

To that end, one of the most important discussions was the views of the group about the nature of AI and how it is perceived. Do we see AI as a boon for humanity or is it the doom of our civilization?

If you are like me, I have been pondering this question for a while. Pundits and media seem to suggest doom, while others see it as something that will ultimately benefit us.

In an effort to answer this question for myself, I have started down the path of understanding it more to help decide for myself. There are moments of both fear and hope. I would suggest making our individual decisions as there is no one to rely on for an answer yet.

While it is tempting to follow the media attention around AI and focus there, this framework needs to be able to measure any force to see if it is truly enabling or impeding human flourishing. Consider the need to apply this to realms such as our governments, our workplaces, and even our families; how well do they enhance our flourishing?

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Have a terrific weekend.
Julian

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AI and Morality

7 June, 2024

Last week, I wrote about my trip to the Vatican and the Humanity 2.0 Conference on Human Flourishing, and this week I am coming back to it.

The context of this year's conference was the nature of human flourishing in the face of the march of Artificial Intelligence. AI is everywhere in the news. Even in the space of a week, there are new aspects emerging.

People are divided on this. Some have Hollywood's take, where the machines become our overlords, and others see it as another tool for humans to control. Fr Philip Larrey, the Chair of Humanity 2.0 and the head of AI studies at Boston College, used the advent of the atom bomb as a fitting analogy.

If you have seen the film *Oppenheimer*, or are familiar with that moment in history, you will relate to the analogy. The atom bomb and its development had, and still does have, huge implications for Humanity. Yet, in the face of this terribly destructive force, the world lived in relative peace with no major world war.

That happened because of the very human rationalization of its power and dangers.

It comes down to how we use the incredible power of AI and that is where the human comes back into focus. The framework for human flourishing can, in effect, be the rule set through which we use AI, but it still comes down to the human beings in the driver seat. Like many innovations, AI can be used for either good or evil.

While this binary approach of good and evil is simplistic, it raises the issue of *how do we safeguard against evil and ensure the good prevails*?

AI in the hands of a dictator or a money crazed business leader can be very dangerous. Not to get too philosophical quoting Hobbes or Kant, but there is a very real danger to us. While I wish it were not the case, I believe that we have seen very deep dents in the armour of goodness.

Business leaders taking short cuts in the interest in profits, and politicians lying with impunity, are all symptoms of a malaise in our society where we are not led by a set of ethics or morality but what we personally want as in "*what's in it for me*?".

Our world is replete with examples of unethical behaviour at all levels. As I have said before, true accountability knocks people back into place through negative consequences, but that is applied after the deed is done. What we need is a set of standards that we all adhere to. If we as humans don't have that standard and live to it, how can we expect that machines will.

The flourishing framework is a starting point. It sets a standard of expectation for all humans. It moves it from a lofty ideal to a pragmatic model that we can compare against and, by establishing that standard, we have something to hold people and our leaders to as well as ourselves to.

It has the potential to become the standard for accountability and, once embedded, it can hopefully survive the assaults against it from the egotistic, hubristic, power hungry people out there.

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So, the framework can protect us from a sentient AI as well as those who wish to enslave humanity into their own egos.

While I may be looking at this through rose coloured glasses, there still remains work for us and that is to be vigilant. We can't rely on the framework, we must speak up and step up when we see things that are not right in our world. We need to face off against those that would oppress ourselves or others.

Cheers,
Julian

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Polarity & Flourishing

14 June, 2024

This week, I want to discuss **polarity**. It has been bothering me for a while, and I see it everywhere in our society. It has the potential to undo any attempts for humanity to flourish, and is causing endless strife and conflict in our world today. You don't have to look far to find it.

By polarity, I mean taking sides to the detriment of listening, learning, and understanding.

Whether it is the traditional polarity of the political left and right, or our inability to see something from another angle, it lurks everywhere in our lives. Humanity has lost the ability to hold two opposing points of view.

Back when I was in school, we were taught to debate. When you went into a debate, you never knew whether you would be pro or con to a topic but, regardless, you had to be able to argue the contrarian view. In this day and age, though, we take a stand, stick to it, and lock into our beliefs and opinions without even exploring or seeking to understand the other side.

People are becoming entrenched in their viewpoints to the extent that they are euphemistically willing to go to war for their stance. Rational thought has given way to passionate beliefs. In this battle of opinions, the truth is the real victim. It may be fuelled by the reality that truth is seen as fleeting, and that facts are manipulated through conjecture or possibility.

In the past, I have written missives about the loss of truth in favour of what we believe is right. What may have been a "truth" in the past is questioned because I couldn't experience, or haven’t experienced, it myself, so it *can't* be true. I may believe that man didn't land on the moon because I didn't see it or because I don't see the earth's curvature on the prairie, so the world *must* be flat.

The proliferation of information has muddied the waters. I can seemingly find a fact to prove my point from anywhere. Social media is also a culprit, as confirmation bias via algorithms reinforces what I like and presents seemingly supportive and affirming information back to me. When this happens, the polarity of what I like leads me to hate the other side, and the proliferation of hate has become the byproduct of it.

By sticking to our beliefs, we choose an easy way out of not thinking and challenging our thoughts and those of others. By choosing not to select one pole over another, our neutrality sets the stage for hate to grow.

In the age of inclusion, there is a paradox when we allow ourselves to fall into one camp or another. We do not include others' views when we entrench on one side. We become exclusionary, which reinforces hate.

For our world to flourish, we need to address this polarity. To address it, we need to open ourselves up to possibility. We must move from judgement to exploration. We must remember that there are always two sides to an argument, and there is never only one cause for an event.

We also need to stop listening to those who would divide us and, instead, find those who will heal us by showing us that there are other ways to see things. This is done by questioning and challenging what we

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see daily and asking, "*How else might this be seen?*" It requires moving from the emotional state to the cognitive state.

This shift in thinking takes work, but the cost of locking into a polarity will be far more costly than the effort to see other ways. Yes, you won't get likes on social media for taking a contrarian or middle-road view, but you will have lived a better life.

So, for this weekend, try it: explore the contrarian view of your own beliefs and see if that helps you better understand others.

Cheers,
Julian

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The Growth of Hate

21 June, 2024

Last week I wrote about the disturbing trend of polarity and the way our society has become entrenched. I received great feedback and want to take it deeper and potentially darker this week in a bit of a longer missive. The trend I have noticed which is related to polarity is the **growth of hate**.

In my estimation, we are no longer a society of rational debate; we have become a society of hate. The rational debate in our society feels set upon by the polarization of us vs. them, my truth vs. your truth, and my good to your evil.

Many elements of our discourse and co-existence have gone to the extreme of polarity where we are unable to hold two opposing views and have become so entrenched that we are demonstrating hatred. Whether that hatred is intense dislike or all the way to ill will, we are seeing it crop up everywhere.

It is no longer inclusion, but it is now exclusion. We are being driven by passions and not logic. We have long seen this in more trivial pursuits like sports rivalries and the like, but are now seeing this tribalism more prevalent in politics, and our day to day living. We are finding ways to express this dislike, whether it be directed at legislation, rights, ethnicities, or "differentness" of any stripe… and expressing it vociferously.

As an example, the frightening upsurge in antisemitism or the growth of islamophobia have shown how intolerant we can be to other human beings. I don't believe that Hobbes was right that we are naturally purely self interested. We need to people to flourish together and not one over another.

I often ask why is this happening – something has to be at the root of this dark side of humanity where we are separated from others.

Last week I suggested that the rise of polarity is coincidental with the upsurge in social media which allows people to rail against others with impunity, and often anonymity. The real issue is in the last part of the statement, it is the growth of that impunity. In the interest of freedom of speech, we have allowed people to express their anger, disdain, and hatred without ramifications. The sceptic in me suggests that the silence of politicians is much to do with votes and popularity couched in rhetoric of freedom of speech rather than just turning a blind eye. But, regardless, we have allowed this anger to be expressed. With every passing over of an issue the perpetrators become emboldened. I believe freedom of speech is essential but not at a cost to others.

I think another potential cause is the post-covid impact. That may appear strange on first read but the existential threat covid may or may not have presented to people have left them thinking very differently about their worlds. My survival has pitted me against others and angered me. My business partner Tony Welsh's words "*not everything changed in covid, but everyone did*" may be more prophetic than we thought. History has shown that mass existential threats have begat massive upheavals in society.

But I come back to impunity. By doing nothing and saying nothing we have emboldened hatred, to paraphrase the oft used quote "*evil grows where good men do nothing*". The growth of impunity is very

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real. So, whether it is technology or societal changes, and likely a combination of these and many other sources, the fact remains it is an issue in need of resolution.

In previous missives I have argued that the ills of our world arise from a lack of accountability. I believe this is true here. We have come to rely on people's sense of responsibility – responsibility being that subjective, personal feeling of right or obligation. We have placed the individual over the greater good. Those changes above have put the individual at the forefront.

Accountability is rooted in the greater good and, as we say at Forrest, one key accountability is for the enterprise overall. Accountability is the antithesis to impunity.

Our world of polarity is costing us greatly. Our world needs accountability now more than ever. Our world needs peace now more than in a very long time and I suggest accountability is the way to that peace.

Consider it within just over a week from Canada Day. In 1867, we were a nation established under the belief of Peace, Order, and Good Government, the very essence of accountability. Right now, we need to re-embrace and reinvigorate our credo as well as offer it to the world. We have much to offer the world and I would suggest we start with what we were founded upon.

Hopefully this will have provoked thought and you will ponder it. I look forward to your comments.

Have a great weekend.

Cheers,
Julian

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Happy Canada Day

28 June, 2024

This week, I am taking a break from the heavy topics of the last few weeks. With the prospect of our National holiday, Canada Day, on the horizon, I would take the opportunity to reflect on this important day in our national psyche.

I am writing this year from outside the Country and will be overseas on the first of July, so my reflections are from a Canadian abroad.

Canada Day used to be a day of pride, pride of who we were as a nation and where we came from. Understandably, in the past few years, it has become a time of circumspection, leading at times to downright inobservance.

Canada Day represents a time when we officially became a nation in the face of the world; it is important to remember that. In 1867, we set out to be something different and worked to distinguish ourselves. The following years were about that distinguishing. We have become a different nation since that time.

There is no better way to be reflective than remembering those facts when you are away in other countries. There is much to be proud of when we see ourselves in the sea of other nations.

Ironically, I am in Scotland, the birthplace of many of our first Prime Ministers, who sought to shape the nation in the face of potential adversaries and to create something different in the northern part of North America. The things that were done as part of that shaping, while unfathomable today, need to be seen in the timeframe they occurred, and all of those have led us to where we are now. It is all about growth and maturation, and we have learned much as a nation along this journey.

So, my hope for you this summer long weekend, is that we can feel that pride in ourselves and acknowledge what we have to offer the world. I wish you and your family a Happy Canada Day. For all those from other nations, I wish you have the same sense of pride in 2024 as we all should have in the accomplishments of all those who have gone before us.

All the very best – steadfast, vigilant, adaptable, and most importantly optimistic,
Julian

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Foundations of Accountability & Responsibility

5 July, 2024

This week, I am returning to an important topic to me, but also for organizations everywhere – that is the fundamental concept of **accountability**.

On numerous occasions I have suggested that our world's issues are based on a lack of accountability. We see it everywhere – in work, in politics – our world is facing a deficit in accountability, which can be disastrous.

As a reminder, we at Forrest & Company define “accountability” as the nature of a relationship with others. By that I mean that we are held, and hold others, accountable. This is distinct from “responsibility” which we define as a personal feeling of obligation.

The distinction is important because, too often, the terms are used as synonyms and they lose meaning. In accountability someone *else* holds us to account for our actions. That holding to account can appear negative. But, if we do something well, someone should commend us for our efforts just as much as they call out when things don’t go well. In responsibility, we push *ourselves* to do work.

Accountability is foundational to managerial leadership; it is core to being a manager in a leadership role. This is not to negate responsibility but, in the work world, one has to come before the other and they are intertwined. Accountability brings alignment and structure. Responsibility brings force and energy in the achievement of what we are aligned towards. Too often, without alignment, we can become out of step with our organizations, and unfettered responsibility can bring dissonance and, worse, downright breakaways from acceptable actions and behaviours.

Accountability enables:

- Delivery of Strategy
- Clarity of purpose
- Clarity of expectations
- Connectivity to work
- Connectivity to others

Responsibility brings:

- Energy
- Passion
- Commitment

There is nothing more disheartening than for employees to go to great efforts and find out it wasn’t what was wanted. In the accountability framework, that isn’t the employee's fault but rather the manager's failings. Accountability must come first and then, with clarity and dialogue, the employee can then commit their sense of responsibility to the work.

But accountability doesn’t stop at just setting it up and walking away. The manager needs to check in, by observing and helping the employee to be successful through coaching and feedback. Ultimately, the

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manager needs to assess how effective the employee was in completing their tasks. The key question in accountability is, *"given the circumstances the employee was in, how well did they perform?"*

At this point, accountability becomes an application of consequences whether positive or negative. The manager then asks *"Do I give them kudos, or do I redirect them?"* This is the final act of accountability for, if *you* have done the first part right by explaining the expectation, it is a question of how well *they* have utilized their sense of responsibility.

This can look like a lot for a managerial leader to do but it is the work of management to perform and cannot be abrogated. With accountability, we can truly unleash the capability of our people by setting them in the right direction and being with them on their journey.

I ask you to look around you this next week and see where a lack of accountability may be manifesting itself. Awareness is the key.

Have a great weekend.

Cheers,
Julian

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Accountability & Anaklesis

12 July, 2024

Thank you for all the feedback last week on accountability and the role of responsibility. I thought I would address an element of accountability that doesn't often get dealt with, such as **when it doesn't work and why**.

I have yet to find anyone or organization that doesn't see the value of accountability. Again, accountability is the ability to hold someone accountable for how well, or not well, they did something. Many supporters of accountability clearly see the rational value, but then it doesn't take hold. People see the logic of defining accountability but don't act.

While logical, it fails to take hold because the emotional or affective side of thinking takes over.

The first challenge to accountability is **Anaklesis**. By anaklesis, I mean our need to lean on our relationships with others. Anaklesis then becomes the fear of damaging those relationships. It is easy to hold someone accountable for something they did well, but it is much harder when there is a need for improvement. Our first challenge is overcoming our basic human instinct to avoid damaging that which we lean on.

It might also be because we lack confidence in assessing how someone did something. In other cases, it can be a real situation where someone we rely upon has had a bad day, and we feel we shouldn't address it because they won't be as engaged tomorrow if we do. Whatever the rationale, it is often the case that we don't want to confront an issue.

There are many tactics to overcome the fear of the "difficult conversation." I will not go into those this week; instead, keeping it at a higher level, it is about understanding that accountability is a chain and cannot be seen as a one-off event.

If I don't hold my people accountable, then my boss needs to apply consequences to me for not doing it. This is another stumbling block: people who hold others accountable are not held accountable themselves. If the chain breaks, it is hard to restart accountability. This chain must be whole down through the organization.

To me, this is the biggest impediment to accountability. If we don't hold *other* managers accountable, how can we assume they will hold *their* people accountable?

If we are not holding our direct report managers accountable, then we cannot reliably expect them to do it out of a sense of obligation or responsibility as defined last week. If you are not demonstrating accountability, you rely on their subjective courage to overcome their anaklesis, which is assured of failure.

This may all seem logical and simple but, in my experience, it isn't. Far too often, I get CEOs and management down through organizations wondering why lower levels of management won't hold their people accountable. The simple question is: Are you holding *them* accountable to do so?

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Accountability is all about applying consequence. I have been referring to not practicing accountability in a negative sense—when something goes wrong. But it is just as problematic when you aren't applying positive consequences when they do things well. It works both ways.

If you want the chain of accountability in your organization, practice it yourself first.

As a hint, start with the positive consequences as much as possible. Refrain from reacting when things go wrong. Ken Blanchard, the leadership guru, had a great line: "*catch 'em doing something right*".

If you start with what they do right, you will build up the counter-anaklesis muscles and you will see how others respond. But, you must always be vigilant of your own anaklesis and ready to deal with it through direct action and, hopefully, before your boss has to exercise holding *you* accountable.

Accountability is nothing more than good leadership and we know our world needs lots of that.

Have a great summer weekend.

Cheers,
Julian

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Accountability & Decision-Making

19 July, 2024

I had a very interesting question posed to me this week. **How do you reduce bureaucracy?**

To address it, I needed to understand what they meant by “bureaucracy”. After all, words are merely analogies for thoughts and, if we think differently, sometimes language can be confusing.

Some see bureaucracy as a version of “red tape” or regulations that reduce freedom of movement; others see it as a waste of time. In the case of the person I spoke to, it was about organizations' inability to make decisions. Everyone has to be involved in the decision process, and it takes inordinate time and energy to move forward.

Interestingly, however, in all three cases, I put it down to a lack of accountability. Last week, I talked about accountability as holding people accountable for the choices they make. But embedded deeply in accountability is the notion that when exercising accountability, there is a key component of decision-making.

If you are to be held accountable for a choice you make, you need the freedom to make that decision. This is the key to accountability.

In our work to define accountability in our clients, the essence boils down to decision-making. The corollary to accountability is, therefore, enabling decision-making at the lowest appropriate levels of the organization. It is about freeing up people to make decisions and ensuring they both have the authority to decide, as well as the clarity that they are expected to make decisions as part of their job.

I often tell people that policies are designed to curb people's sense of responsibility. In other words, in organizations with no accountability, we use policies to curb people's innate sense of what to do. So, red tape thrives in the absence of accountability.

But why, then, does everyone need to be involved in decisions?

There are three reasons:

- We are unsure who should make the decision, so we bring as many people together as possible in the hope of figuring it out
- Anaklesis is rife in the organization, so we don't want to leave people out for fear of alienating them
- We don't know how to make decisions, so fear creeps in that we might make the wrong decision. This is a matter of risk assessment and unexplored risk becomes fear.

The last bullet is very real. Strangely, very few of us have been given a framework to make decisions.

If I lack a framework, I may lose confidence in my decision, and if I cannot show you how I made my decision through a framework, you, too, will lose confidence in my decision-making.

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Clarity of accountability enables us to be clear who has the authority to make the decision. That clarity reduces our anaklesis and ensures everyone knows who makes the decision. It also defines who needs to be brought into the decision process and ensures they know that.

So, what about the third bullet? As part of our accountability work, we teach people how to make decisions—we give them a cognitive framework.

In the end, clarity of accountability brings about:

- Alignment
- Speed of decisions
- Reduction of red tape
- Increased productivity
- Confidence, and
- Ultimately engagement

Who wouldn't want that for their organizations?

So, if you find yourself in too many meetings, missing deadlines, and lacking empowerment, consider clarifying accountability to reduce your bureaucracy.

Have a great weekend.

Cheers,
Julian

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Accountability & Authority

26 July, 2024

Last week's missive on bureaucracy and its antidote of Accountability—the act of holding someone to account for how well or not well they had performed—brought many reactions and great responses.

To quote one of my great mentors, Michael Anderson, "*things without consequences are of no consequence*." That is true of both positive and negative consequences equally. If you don't catch someone doing something right, there will be no consequence to someone, and their efforts will be meaningless.

A topic that has received less attention in our recent missives is the concept of Authority. We define Authority as legitimate(d) power, and a key aspect of this is the ability to make decisions.

As a leader, you may choose to set boundaries on your team's decisions, and this is a matter of your judgement and discretion. However, the one constant rule is the need for clarity. People are not mind readers; they need a clear understanding of your intentions.

Regarding Authority, there is an adage that is important to remember: *Accountability without Authority is unfair.* If you clearly grant the Authority to do assigned work, and apply consequences based on this, you have energized your people.

By the same token though, Authority without Accountability is dangerous. If people are free to do whatever they want without consequences, then you have set a dangerous precedent. Bureaucracies often fall victim to people acting without constraints.

Authority is a very powerful tool. In clarifying work for our clients, we find that people have a general sense of what they are expected to deliver – what they are unclear on is their commensurate Authority.

Authority represents our power, and we humans often crave power and control over our work and our environment. When we don't clarify Authority, people will try to seize control. This is not to suggest that it is necessarily nefarious; it is merely us exercising our sense of Responsibility for what we think is necessary, often seen in the light of what we see as the greater good.

This can also tempt people to throw up their hands and declare that their work cannot be done since they do not have the power to make things happen. This breeds disengagement and ineffectiveness.

Clarifying Authority can seem, on the outset, like much ado about nothing. Clarifying Authority is key to directing energy and, therefore, productivity. When it is unclear, we may wait and not make decisions or overstep our bounds, which then leads to stepping on others' toes. In these cases, it leads to rework or even conflict and mistrust.

I often hear clients suggesting, "w*e use the RACI model*." In these cases, it doesn't really represent Authority. Determining who is Responsible, Accountable, Consulted, and Informed is great for defining who is involved in a project, but it doesn't get to the nub of Authority.

Defining Authority is about clarifying who can help me, who has a say over my work, and who can direct my energies. In turn, it also defines who I have control over to fulfill my accountabilities.

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What supercharges those Authorities is that a Manager holds someone accountable for delivering things to me or ensuring that they will respond accordingly if I have Authority over their work. Therefore, the act of being held to account is intertwined with Authority. A simple example is, if I am to get service from someone in another team or department, there is someone there to hold the responder to account for delivering it. I am not really controlling them, for their manager is holding them to account for delivering it.

This is important, especially in the face of anaklesis, where I don't want to damage the relationship. In the Accountability model, they aren't doing me a favour; we are both working to deliver on the organization's Strategy. I don't have to screw up my courage to ask for the service. They know they have to provide it; if they can't, that is a matter of conflicting priorities, such as when two tasks have the same deadline or when a task conflicts with a team's overall goals. In the case of conflicting priorities, we need to escalate to our manager for resolution and not wait in silence, hoping that things will somehow change. Timely escalation in these circumstances becomes critical to productivity.

It is difficult to cover all the various aspects of Accountability, Authority, and escalation in this short missive, but hopefully, I have given you a brief sense of how it works and, more importantly, why it helps increase productivity.

Have a great weekend.

Cheers,
Julian

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Team Building vs Building Teams

2 August, 2024

This week, I want to explore the nature of the difference between **Building Teams and Team Building**. It follows the past few weeks' discussion of accountability, but it isn't a matter of mere semantics. We at Forrest & Company like to distinguish words, just like we have done with accountability and responsibility. We differentiate between Team Building and Building Teams.

The order of the words suggests a difference, but the two are intertwined when dealing with teams and, if you want the best out of your teams, you need to practice both.

By **Team Building**, we mean:

- Interpersonal dynamics in the team
- A behavioural focus, and
- A personal sense of responsibility

What this often conjures up is what most teams do at some point: they have trust falls, axe throwing, pizza lunches, and, of course, workshops to understand one another. This became even more prevalent with the rise of remote and hybrid working environments.

This is often where building the team stops. We feel better because we understand our peers and feel better about things because we can connect with others.

The problem is that it is short-lived. We often get back into the maelstrom of work and forget what we know of the others in our teams. Rapport dissipates rapidly, agendas emerge, and confusion persists from having different priorities as we return to our old ways and approaches.

Don't get me wrong; elements of team dynamics have to be addressed but, when treated as one-off events, they don't hold up when faced with the crucible of work and challenges. That is why **Building Teams** is necessary for sustainability and cohesion.

Building Teams is characterized by:

- Defining structure and processes (accountability)
- Clarifying role relationships between roles (authority), and, ultimately,
- The exercise of holding people to account

Building Teams is harder work, but it is your insurance policy. It ensures your team is on a level playing field. It takes time, but it is how you truly mould the team to what you need them to deliver.

Building Teams is the work of the leader. Team Building is very much left to the individual team members' sense of responsibility. When teams are struggling, it is very rarely based on our inability to get along; it is because the team has not been built. If you have a team that is failing, you need to look first at the leader, not how everyone gets along. After all, the manager is accountable to *their* manager for the team's output and working behaviours.

Only after you have done the heavy lifting of Building the Team can you focus on the Team Building.

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To Build the Team, you need to:

- Ensure everyone understands the scope and context of the teamwork
- Overcome any anaklesis that is getting in the way of people performing
- Clarify the roles and the interrelationships of the roles
- Define the expectations for behaviours in the team

Forrest often gets called in to help solve a team's problems, and, before we go to team building, we first consider whether the team was built in the first place. Far too often, the assumption is that the issue is about personalities, but it is really about the dynamic in which those personalities work.

Finally, there is a far greater need for Building Teams in the age of hybrid work. When people have limited opportunities to understand and interact with one another, they need clarity on the expectations for work and their interrelationships so that our teams can work together to achieve the Strategy.

So, think back to teams that have struggled, or are struggling, and ask yourself – was there any building of the team, or are they relying just on team building?

I hope this has given you something to ponder on this hot, long weekend of the summer.

Cheers,
Julian

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Building a Team

9 August, 2024

Last week's missive generated some great responses. This week, I will continue the discussion of **Building a Team**.

Last week I made the case for the difference between Team Building and Building Teams. While the two are intertwined, both are necessary when you are in a managerial leadership role and accountable to your manager for building a team of increasingly capable Direct Reports.

Team building is about interpersonal dynamics; building a team defines how the team will work together. We rarely take the time for the latter, preferring to rely on people's sense of personal obligation instead. Building the team is key to defining accountability and authority to succeed.

If we don't start by building the team then, no matter how hard you work on personal interrelationships, you will not have success. If the team has been together for a long time and nothing has changed, we may be able to skip building the team, but it tends to come crashing down when someone new joins the team and upsets the equilibrium.

Since I covered Building Teams last week, today is about Team Building. Team Building isn't about going offsite for social events and games. While these can work for a period, they don't hold up well once back in the crucible of work.

For team building at Forrest, we help teams understand one another using Effective Intelligence (EI) by understanding how we all think about work. Many of you will have been exposed to this through us. EI helps people understand their thinking preferences and the preferences of others so that they can work more collaboratively.

Thinking is the core of behaviour. While many tools help teams understand personality, this tool helps people understand their preferences in thinking. Then, it gives them the tools to make decisions, sell ideas, or solve problems. As I like to say, we teach people *how* to think, not *what* to think.

In my 28 years of using the tool, I have not found two people with the same thinking profile in the same organization. There are similarities, sure, but each of us is different. Thinking is the core diversity for everyone, and, because we all think differently, we see situations differently. When conflicts in thought inevitably arise, it can lead to burying it, crossing fingers, or seeing it flare up.

In its simplest format, EI defines six basic ways we think:

- Focussing on the past to **judge** what is right includes using rationality/logic or a personal evaluation of what is good
- Orienting to the present to **describe** what is true, which provides quantifiable facts or sensing what is going on
- Future-orienting to **realise** what might be new, and this includes ingenuity or being visionary

As you can see, an added dimension here segregates our thinking into cognitive, tangible thinking and intangible, emotive or affective thinking.

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We have found that, when a team begins to understand one another's thinking preferences, it helps them understand one another better. The added bonus of EI, which general personality profiles aren't able to do, is that it provides a process for the teams to establish norms to work together. It works because it uses the same language to define a person's thinking to also define the process of thinking through a task at hand.

The norms are essential to team building because they remove the tensions of personal thinking by establishing a cognitive process for a team to work together. In this way, the focus of team building is not just shared experience but a path for teams to use to work more effectively together and value the diversity of thinking within the team.

Thinking is truly an undiscovered country, and if you can harness the thinking capability of your team, you will truly build it.

The very simple overview of the six ways of thinking above may help you understand your teams' diversity. So, I suggest you reflect upon them to help you understand your own thinking and the thinking of those around you. If you do, you are on your way to the first steps of team building, made possible by the work already invested in building your team.

Have a great weekend.

Cheers,
Julian

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The Need for Tri-level Meetings

16 August, 2024

This week's missive is a variation on the last few weeks. I have written about Building Teams and Team Building, and as I finish up the course of thought this week, I am coming back to a facet of Building Teams that often occurs naturally but with little forethought. Today is all about **building the tri-level team.**

As the name suggests, a tri-level team has three levels to it. When people think of teams, they often think solely of the boss and their direct reports – basically two levels. The tri-level team comprises the Manager-once-Removed, the Managers, and their Direct Reports.

It brings together teams of teams to laterally integrate across a group for three levels of engagement. Tri-level teams are a powerful way to ensure alignment and clarity of expectation. In tri-level isn't how the group operates all the time, so it has a lasting impact when you bring together in this manner.

The tri-level is a meeting. All-hands meetings tend to be looked on negatively, but time spent in tri-level meetings will reduce the need for separate meetings later because you will have created alignment. Our clients' best practices are that these meetings are held at least four times per year. Sometimes, the group can be large, and anything over 50 is unwieldy, so you may have to do it in tranches, but it is worth it.

A tri-level team meeting enables:

- Providing clear context and messaging
- Clarifying who is doing what
- Resolving concerns, conflicts, and roadblocks
- Clarifying cross-functionality

As I discussed two weeks ago, these are all hallmarks of building a team. However, team building can also include the added facet of interpersonal dynamics, where the group gets to work on interpersonal dynamics. It isn't as effective when done virtually but is doable.

In the hybrid work era, providing clarity and understanding of how we work together is even more critical given flexible work locations and schedules. The key is bringing people together for clarity and integration.

For a CEO, the tri-level provides you the opportunity to align the strategic and operational levels of the organization.

For Direct Reports at the bottom of the tri-level, you see how you fit in. It also allows teams to understand and connect with others because most work in organizations occurs laterally.

If you are the tri-level leader, you can see your subordinate leaders at work and assess the talent at the lower levels. The meeting also allows you to gauge the health of your team - not just via hearsay or choruses of 'fine' but through first-hand engagement with those teams. As the leader, a golden rule to

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remember is that your Direct Reports should not hear something for the first time in this meeting. If they do, then you have not been aligning your Direct Reports first.

Your leadership and setting of alignment cascade comfort and cohesion, and engaging the broader team allows for creating a stronger support network for the individuals within.

It is the ultimate tool for building a team. At that tri-level, you have the chance to clarify not just accountability but authority for everyone's roles. It is also your chance to establish and align the standards for behaviour across the group. In effect, you are knitting the workforce together.

In my book, I argue one of the biggest gaps in organizations is the management of managers, and your tri-level is the time when you get to ensure that your management is aligned and ready to face the work ahead.

Have a great weekend.

Cheers,
Julian

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Thinking and Understanding in a Team

23 August, 2024

This week, I am returning to a topic I raised two weeks ago about team building: the nature and understanding of thinking in a team. It is about having a sense of the team's strengths and weaknesses and, more importantly, having processes to think through team issues.

By thinking, I mean how we use our whole selves to do something. I realize this is a broad definition. By it, I mean how we use our mind and our body, our cognitive thinking, and our feeling thinking.

The two are tightly interrelated. Our feelings launch our minds in a direction, and our thoughts launch our feelings. The interplay between the two is very real, each helping or impacting the other. Research around Emotional Intelligence has put the feeling side of ourselves on the same plane as Intelligence Quotient, so that is why we call it all thinking.

We have worked for decades on how people think and how they interrelate their emotional self with their cerebral self. The tool we use at Forrest is Effective Intelligence. Developed by Philips and Jerry Rhodes, the tool gives people an understanding of the different types of thinking, but more importantly, as we have found over time, the processes to think through issues either as individuals or in teams.

This is why it is important for team building. For team building, we need common processes and a common language.

If you doubt that, ask yourself: What does Strategy mean? If you ask two different people, they will have two distinct definitions. Is Strategy akin to a decision? Is it about defining our visions, missions, and objectives? Or is it a plan to achieve something?

It goes further: When someone says we have no innovation in our organization, do they mean we have no new ideas, or are we unable to put new ideas into action? All four examples require different thinking approaches. Is it creativity or socializing? Is it decisions or planning?

To add to the confusion, as I said two weeks ago, everyone has a different thinking profile. It makes it challenging for us to get on the same page. Process and profiling are important.

Far too many team-building tools attempt to clarify who you are. We all love to gain insight into who we are and to be able to categorize, describe, and distinguish ourselves from others. However, the key to team building is not just understanding one another; it is about doing something with that understanding.

Knowing yourself and others knowing who you are builds familiarity, but the jury is out on its ability to improve productivity.

True productivity comes from doing something, and thinking is the root of doing. Process and profile work to steer the thinking in individuals and groups to enable productivity.

For example, when we have a process for decision-making, any disagreements are not about ourselves but rather about the data we are using, thereby reducing anxiety, stress, and potential conflict. That is why the process is key to team building rather than personality.

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Of course, this all sounds rational and logical, and you can see it comes from that side of thinking, whereas many people prefer to rely on their feelings and the emotive side of their thinking. There is space for all, but it is a case of knowing when to use which, and again, that comes back to processing.

Finally, ponder your own team for a moment. How much of their pay cheques is for their thinking? I argue that we are paid for our thinking because thinking leads to doing and, therefore, productivity.

This missive is some food for thought on this summer weekend.

Have a great one.

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A New Start

30 August, 2024

This week is a short reflection on the beginning of a new year. For me, the beginning of September always felt like the true New Year. Probably a victim of conditioning from all those years of schooling, I have always felt that September started everything afresh.

I have noticed this summer has been the same. It felt that many things got put on hold once July began and as everyone began their summer holidays. Things got deferred for the great restart in September.

On this eve of the last long weekend of summer, my thoughts turn to what the new year of the Fall has in store for all of us. Before summer, the world felt in a state of disarray, but as the summer has gone on, it feels like there may be new hope on the horizon.

Holidays provide us with a chance to reflect on what we want and need for the remainder of 2024. So, this short missive is one of encouragement and renewal.

I wish you all the very best on the long weekend. Hopefully, you will have the chance to ponder what the remaining months of the year will be about for you and what you will put your energies toward. It is a great time to consider where we are at as kids return to school and we gird ourselves for what lies ahead in the coming months.

I hope you get the chance to reflect on what the year 2024 has meant to you so far and what new commitments you want and need to make going into the last third of the year. I don't get enough time to reflect, and I hope that you can do better than me at it.

I wish you and your family the very best over this weekend and in the months to come. Enjoy the restart that this time provides.

All the best, and I look forward to renewed discussions in the coming weeks and months.

Cheers,
Julian

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Employee Well-Being

6 September, 2024

This week there was an interesting article released that likely went past many people without notice.

As we started heading back to work and back to school, the US Surgeon General released an advisory that parenting can drastically impact mental and physical health. The key to this is that it puts the advisory on parenting in the same sphere as previous advisories on opioids and smoking.

Let that sink in for a moment.

Now, you may not agree with the US Surgeon General, but it sheds light on yet another issue about mental well-being that can impact those around us.

Even as a father of four, I have not necessarily felt the stress as acutely as others. I have had a traditional marriage in which my wife has taken on the brunt of raising the kids even while holding a full-time job, as I gallivanted about in two careers with the army and business simultaneously.

But, the news did get me thinking that there may be truth to the finding and that it is another one of those unseen stressors that impact our employees, peers, and managers. It is true that the brunt of parenting often falls on one parent over the other, frequently “mom”, and can, at times, challenge career growth and potential.

Last week, I talked about how the beginning of September feels like the start of a new year. As we start back, is there no time for us to consider all the stressors that those around us face? Indeed, in many cases, those stressors remain unseen, whether it is finances, family, health, etc.

We are in a new age of work. In the past, you were expected to keep your outside work life separated from the workplace, but that was gradually changing and went completely out the window when COVID forced so many to work from home. Even today, in hybrid work environments, the lines between work and outside of work often get blurred.

This week's message is clear - it's time to reassess our perception of others. We must take a moment to look around and consider the challenges our colleagues may be facing, both within and outside of work. It's a call to suspend judgment and prioritize understanding, to truly comprehend the situations of our co-workers, employees, and managers.

This is essential for those in managerial leadership roles. It is a leadership function; as leaders, we need to know our people and promote their welfare. Knowing the stresses your employees are under is key to understanding their capability.

Far too often, we believe that others need to behave in a certain way but fail to "walk a mile in their shoes." We miss finding out what is really impacting and important to others. As we say with PTSD, when someone says they are fine, you need to dig deeper and be certain.

September is the beginning of this new year, an opportune time to understand where your people are and ensure you are looking after their best interests.

Have a great weekend.

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Cheers,
Julian

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Thinking Through Your Career

13 September, 2024

I am writing about a presentation I gave to 1,100 international employees this week. The topic was "Thinking Through Your Career." The premise of my topic was rooted in an issue I have seen a lot of, particularly lately: people moving through their careers without reflection and thought.

It is an issue for everyone, but especially those who find themselves in roles but have not considered what will enable them to truly flourish.

The issue at hand is that, often, we find ourselves in roles that we are comfortable with but lack something we need. The result is getting stuck or into a rut. At Forrest & Company, we refer to this as the “boiling frog syndrome”. The analogy was made popular by Al Gore – the premise being that if you have a pot of boiling water on a stove, and you throw a frog into it, the frog will jump out, but, if you put a frog in a pot and gradually turn the heat up, the frog will boil to death. While a grizzly (and likely apocryphal) analogy, it represents what happens to people if they don't think through their careers.

We often stay in roles because they are comfortable. In the past, I have discussed anaklesis as the core cause of this. We stay because we are used to it and lean on our experiences and beliefs to make us feel whole. Far too often, this is the cause of why we stay. It is what we know.

My attempt with the group was to get them to truly consider, think through, and make decisions about their careers. And the key to considering your career is understanding how to make decisions.

In past missives, I have explained that the decision-making process starts with decisions about your criteria. The same is true for deciding on a career; it starts not by gathering information but rather by choosing what you need and want.

Because of anaklesis and environmental factors, we don't stop and think through what we want and need. We don't take the time to explore this aspect of our lives. Once we are clear on what we need and want, then we look at options, and, as related in the presentation, this is where networking becomes essential. Networking helps us to both generate options and amass the data about how well those options satisfy our wants and needs.

These are the foundations of decision-making, but we need to teach our people how to make decisions because, very often, nobody else has.

The real shadow hanging over exploring our careers is risk, and unexplored risk becomes fear. This is at the heart of why we don't explore our careers. Again, except for risk experts, the average employee has no framework for exploring risk. They often leave it to a gut reaction, and this is where the fear spreads. I have written about risk in past missives, but it comes home to roost when thinking about one's career. Risk, combined with anaklesis and environmental circumstances, creates fear that often leads to boiling frogs.

So, the key to thinking through your career is to have clarity of what you need and want, but then comes that other very important part: the courage to go after it.

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Far too many times, clients of ours are caught out when the organization they belong to deselects them, and they are faced for the first time having to get that clarity and then screw up the courage to move on.

The title *Thinking Through Your Career* is a double entendre. The same decision-making process you use to decide on your career is the same process you must apply to all aspects of your job and work. It is about using cognitive frameworks to help you think through the most important parts of your life.

I have distilled my hour-long presentation, but if you want more information and details, please feel free to reach out.

Cheers,
Julian

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Clarifying Accountability

20 September, 2024

Every week, I rack my brain to find a topic suitable for the weekly missive. Usually, I reflect on the week that was and consider what insights or topics may have come to the forefront. There were several this week, but I have decided on one that just came to me as I was describing the nature of accountability to a client.

If you have been following the missives over the years and have read my book, we are very focused on accountability at Forrest & Company and how it is a separate concept than responsibility. People often need clarification on this distinction.

As you may remember, we define **responsibility** as subjective and internal to each of us. Our sense of responsibility comes from our individual beliefs and upbringing and a whole host of things that we value.

On the other hand, **accountability** is that objective, tangible clarity that comes from a manager in a managerial hierarchy. My manager holds me to account for delivering on the strategy. In turn, they praise me if I do well and coach me in my performance if I have not done so well.

The issue is these two different definitions tend to come back together in practice, regardless of how much we work to pull them apart. We see this when my leader defines what I am accountable for, gains agreement from me, and then leaves it up to me to apply a sense of responsibility to deliver.

It doesn't end there because my manager then follows up and applies either the good or bad consequences based on my effectiveness in doing my work. It is therefore a cycle that starts with accountability and ends with the application of accountability.

What got me thinking this Thursday evening was that, this week alone, I was introduced to three new organizations whose values included “accountability”. The issue is that their definition of accountability is what many pundits refer to as "*personal* accountability". In other words, what we would call responsibility.

So why do organizations rely on personal accountability rather than *managerial* accountability? The cynic in me puts it down to three things:

1. It is easier to put the onus on employees (it isn't)
2. Our managers don't want to have to do the work of management (they should), and,
3. It is wrapped up in misbegotten beliefs that somehow this is engagement (it isn't)

The issue with leaving things up to each of our senses of responsibility is that we are all unique and may have different standards for personal accountability and “the right thing”. If you rely solely on people's sense of responsibility, you will be doomed to failure. The strategy will falter, goals will not be met, people will not grow, develop, and flourish, and trust will be damaged.

So, I asked myself today why we stick to a definition that runs into roadblocks. The difference in our definition comes from our roots in leadership development. It defines the leader's role in enabling

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personal accountability. We believe there are no bad organizations, only bad managers. Our view is that what enables organizations to be successful is the practice of professional managerial leadership.

It is difficult to encapsulate this succinctly in a short missive. If you would like to challenge or discuss this further, feel free to reach out. Hopefully, this is food for thought for this end-of-summer, beginning-of-fall weekend.

Cheers,
Julian

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Continuing Reconciliation

27 September, 2024

In writing this week's missive, I thought I would revisit what I wrote in Managing the Maelstrom three years ago on the eve of the first Truth and Reconciliation Day in Canada.

Three years ago, the story of the Residential Schools was laid bare for everyone for the first time. The nation was reeling as we came to grips with understanding a school system that was designed to assimilate the First Nations of our country, to strip them of language and culture, and conform them into what we saw as being Canadian.

As I write that, I am struck by the irony of that statement.

I can't speak to the mentality of 1867, when the schools were first established. As a student of history, I believe context is important. While by today's standards, the approach was abhorrent, what I find hard to fathom is that it occurred right up to 1996. In the context of the 1990's, which I remember well, it is impossible to justify the practice. The perpetrators over all those years leading up to the cusp of the 21st century should have been held accountable.

The fact that the Truth and Reconciliation Commission was established in 2008, and recommended in 2014 that there be a day of atonement, but it took another six years and the stories of the schools breaking, suggest that again we were asleep at the switch.

Three years ago I wrote and still believe "*Great, we are having a Truth and Reconciliation Day. However, let's make it every day. As a nation, we need justice, not symbols; potable water, not flags; we need to do better every day. We need to learn*."

So, all this brings us to today, where the issue of lack of potable water continues even as we wring our hands and make hollow land acknowledgement statements. Our Northern communities resemble the third world, and life expectancy for our "First" Nations is the lowest in the nation and only marginally improving.

When my colleagues and I started the Ranger Foundation in 2015, I thought I was doing well by raising awareness of First Nations issues in Northern Ontario. It was to make the financial heart of Toronto aware of the work of the Rangers, who are 95% Indigenous, who protect and care for the communities and peoples of the North. The point was to show the challenges of the North and just how so many lives live by a thread, and it only scratches the surface. But getting attention here has proven much harder than I thought it would. At the same time, as you look around everywhere, not just in the North, you see the effects of the residential school system.

If we believe in Truth and Reconciliation, we need to do more. It isn't about social media posts and wearing an orange shirt on one day a year. It isn't about the corporate tick in the box; it is done. We need to live it every day if we are to reconcile.

What worries me is that this, too, will be a flash in the pan, especially in the corporate world. Corporations already show signs of tiring over diversity, equity, and inclusion issues. Will Truth and Reconciliation be next?

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On the eve of this year's federal statutory holiday, I wonder how we can make this real so that we don't have to wait another three years to ensure that our people are treated with the respect and dignity they deserve.

Perhaps it is a case of trying these things:

- Read in or take part in events to understand for ourselves the implications of what happened
- Reaching out to our elected politicians and holding them accountable to create the changes to improve the lives of our First Nations, or
- Put it at the forefront of our thinking daily, not just on one day.

Have a great weekend and a reflective Truth and Reconciliation Day.

Cheers,
Julian

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Managing Stress in a VUCA World

4 October, 2024

Here we are through the first month of what I euphemistically call the New Year. I call it the New Year because my muscle and mental memories always see September as a new start.

I sensed that people were very busy over September and now into October. Whether it was because there was downtime in August, and everyone is now back and going at a breakneck pace, or just a continuation of an already busy time, I am not sure.

What I am sure of is that, when I gather information from clients on their major pain points, the issue of feeling overwhelmed continually comes out as number one.

In that sense of being overwhelmed, there can be excitement and energy or exhaustion. Some will see busyness and activity as good stress or eu-stress, and others will see it as bad stress or dis-stress.

In discussing this with clients and friends alike, though, there is something more right now. While it would be good to divorce work stress and see it as something different, it is supercharged by the world and the lives we lead right now.

I have written in the past about the nature of the VUCA world we are in right now. VUCA is Volatile, Uncertain, Complex, and Ambiguous. The Marine Corps coined the term twenty years ago. It came to prominence in the COVID era and hasn't stopped.

Volatility is everywhere now: in Ukraine, the Middle East, and the streets of our cities. Uncertainty is in the economics or the prospect of World War Three. Complexity is related to the fact that there is no simple solution; there is no black-and-white like we used to have. We need to watch what we say and watch what we do. Finally, ambiguity is everywhere, with inflation and interest rates as examples.

My point this week is that, while people may be challenged by their work, there are a myriad of other issues in this VUCA world that will impact them.

However, there is another I still need to address, and that is everyone's own life – issues like personal health, elder care, and child care are just a few other elements that impact daily goings-on.

In the past, we compartmentalized these things. We segregated work from home. We can't do that anymore and, if you doubt that, look at the reaction to returning to the office and the impact of hybrid work.

As leaders, we need to be empathetic and look for and identify our people's emotions. But most importantly, we need to exercise the golden rule of leadership: "*Know your people and promote their welfare*." Know what they need and want and help them achieve it.

But to be an effective leader, you must also manage your own stress. Stress management is often best achieved by regaining control of some parts of our lives.

This simple list gives you some tools for you and also to pass on to others:

- Exercise – I know that many are doing it, but a healthy body = a healthy mind

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- Connection – making sure that others and we are connecting with others; checking in, and seeing how others are is critical
- Seek Support – It is not the time to shelter in place but, like connection, it is about asking for help and relying on others
- Action – Taking direct action on the little things will help to give us a sense of completion and personal power
- Self-care—This is linked to exercise and direct action, but ask, "*What have I done for myself recently?*" It, too, gives us personal power.

In this crazy world, it is hard to pause and think. Now more than ever, take a breath and look around, not just for your team but also for yourself. These are the steps to helping others and ourselves to flourish.

Cheers,
Julian

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Dealing with Ambiguity

11 October, 2024

Last week, I ventured into discussing VUCA, a topic I have explored in many different missives. VUCA represents the nature of our world, which is Volatile, Uncertain, Complex, and Ambiguous.

I discussed this with a client who was concerned that their teams were uncomfortable acting in a world of uncertainty.

Interestingly, as I have been thinking about this over the past few days, I have considered the interrelationship of uncertainty and ambiguity. They are, in fact, two sides of the same coin. As I researched for this week's missive, I found that ambiguity's roots come from the Latin for doubtful or wandering. The doubt relates directly to uncertainty, and wandering is the nature of fluidity.

Uncertainty is rooted in a concern for a lack of facts. In effect, uncertainty comes from a situation where we lack the truth. It is not surprising that there is uncertainty in today's world. For me, I find it hard to find truth anywhere anymore. I cannot rely on media or social media because there always seems to be a spin.

It struck me that uncertainty drives us into ambiguity. The issue that my client was struggling with for their team was not their issue with uncertainty but with ambiguity.

In our work with Effective Intelligence, where we have profiled thousands of managers' thinking styles, we find that there is a style that often initially struggles with the lack of truth, and a style of thinking that initially embraces ambiguity. The orientation to facts relies on experience and revels in reality, which is naturally at odds with the ideas of multiple possibilities. Whereas the mindset that embraces ambiguity is all about possibilities, what might be, and the world of alternates.

What we know, however, is that people can change their thinking and think differently about things. In fact, we encourage and help people to think differently rather than feeling trapped in only one way to approach life.

In the face of uncertainty, how do you embrace ambiguity? For those challenged by this uncertain world, consider:

- How can I value ambiguity and see it as a reality?
- Do I really need to have the truth here?
- How else might this be real?
- What other angles can this be seen from?
- How else might someone see this?

These relieve the stress, discomfort and pressure from facing ambiguity.

I am not advocating for ambiguity, but it is our reality. There is no point in being an ostrich and burying our heads in the sand, nor is there value in stewing about it.

Many who struggle with incertitude will need help embracing the enigmatic nature of our world. Helping them reframe and see that there are multiple possibilities out there is important. It is part of the golden

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rule of leadership—"*know your people and promote their welfare*." It requires empathy to recognize the feelings involved, and it requires patience and listening.

So, if you struggle with or know someone who struggles with the challenges of our VUCA world, perhaps consider this approach.

In the face of this crazy world, I wish you and your family a happy weekend and a Happy Thanksgiving for those of us here in Canada.

Cheers,
Julian

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Investing in People

18 October, 2024

This week, I am returning to an area I have discussed in the past—risk. Our resident psychologist, Kimberly Thomas, suggested this week's topic. It is an exploration I hadn't thought of before and got me thinking about how we view risk.

This week, we are discussing the risk of not doing enough to care for our people. This risk is often overlooked because we tend to examine risk strictly from the standpoint of cost. We think in terms of reputational, financial, operational, or strategic risks.

What I am referring to is a Human Capital Risk, not just the risk of low morale. While not caring for our people can lead to low morale, the issue is the cost of performance loss.

Often, organizations don't consider low morale a risk. Those who do are usually only focused on the systemic issues in the organization and, while this needs addressing, there are other ways to look at it.

Ask yourself these questions:

- Are your people working at their peak performance?
- Do you know if you are getting the true potential from your workforce?
- Are there impediments to them working at their true potential?

There are many contributors to low morale, and while the organization either causes or influences many of those, there are others outside of that realm.

Human beings are complex entities and, in the post-COVID world, we have gained new insight into those complexities. A multitude of factors can lead to low performance, and these are often inside the individuals themselves:

- Lack of confidence
- Inhibitions
- Fear of the unknown
- Childcare
- Eldercare
- Issues at home

The average manager is not armed to deal with these. The manager can be empathetic, and even sympathetic, but helping their people solve them is likely beyond their ken.

Sometimes, companies rely on general external coaches to help, but they, too, may not be qualified and, based on the coaches' predilections, they might do more harm than good.

Enter the realm of professional performance coaching from an expert, which our roster at Forrest provides. We are fortunate also to have psychological expertise in Kimberly to help our clients. Her role is to support when we have identified the issues through our other coaches.

So, what can an organization do to help their people and thereby reduce the risk of low performance?

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1. Identify the issues where performance does not match the potential of the individual
2. Identify the internal systemic problems that may be interfering with the individual's performance
3. Address those issues and solve the internal issues (this is, after all, the role of the managerial leader)
4. Identify if it is internal to the individual and get the necessary help from a professional

The benefits of tackling and expending energy and resources to do this are:

- Increased productivity
- Reduced turnover
- Greater loyalty
- Increased retention in the organization of good talent

In the end, you create a great place to work that boosts your organization's net promoter scores and becomes a magnet for good talent.

You enable your organization to flourish when you enable your people to flourish. After all, until robots run your business, your people are your most important resource. They make your business sing.

Have a great weekend.
Julian

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A Return to Accountability

25 October, 2024

These missives are often written from the perspective of what transpires each week in my discussions with clients. I write them this way so that others may gain insight into others' challenges, learn from them, and use them to practice continuous improvement in their own organizations.

This week, the topic that came up is a familiar one: **Accountability**.

By Accountability, I mean:

- Defining our expectations of those who work for us
- Defining the extent and the limits of their authority
- The actual exercise of holding someone to account by applying both positive and negative consequences

As I have said before, I believe dysfunction in our society stems from a lack of Accountability at the meta-level. The meta is in the geopolitical state of our nations. Closer to home, it is the root of dysfunction in our organizations and businesses.

That said, how do you know there is an accountability issue?

As I wrote in my book, it is a matter of looking at the pain inside the organization. The root cause of that pain is a lack of Accountability. This week I was presented with the pain several organizations were feeling, and here is a sampling:

- Failure to achieve our goals
- Productivity wasted as everyone tries to work nicely together through interminable meetings
- Abhorrent behaviour by the minority who impose themselves on others
- Inability to come to a closure on activities because everyone has an opinion
- Employees feeling overwhelmed because everything is a priority
- Decisions made either too slowly or continually revisited become watered down, and opportunities missed
- Fear to speak up and call out issues because of cultures of recrimination
- A lack of innovation or implementation of new things because it is safer to do it the old way
- Employees feeling they need to weigh in on issues because they feel responsible and have the desire to control others' work
- Some employees are working harder than others

So how is all this laid at the feet of Accountability?

Fundamentally, Accountability is the relationship between the leader and the direct report. It may sound hierarchical, but the nature of organizations is that they need a hierarchy. It is not to suggest one person is more important than the other – we need a hierarchy to ensure our strategy and objectives are met. Everyone in every organization needs to follow a boss of sorts. When no one is provided with guidelines, we see hierarchy go awry. The CEO needs to be held to account by owners or a Board, and when that

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starts to falter, governments need to step in. The travesties of industrial society that were not held in check led to the need for legislation to protect employees.

Accountability relies on everyone's use of Judgment and Discretion. It isn't a rote system; it is not something that is measured but judged. Managers need to judge their people's work, just as employees need the freedom to use their judgment to do their work. Accountability, again, gives us the guidelines for Judgment and Discretion and ensures we stay within our bounds.

It does, however, need the other side, and that is **Authority**. Authority represents legitimated power. It represents decision rights, resources and ability to get help or have a say in the work of others. A world of Accountability without Authority is unfair. To be held to Account without knowing your Authority causes one to halt and stop. On the other hand, when one has Authority without Accountability, it is dangerous. In extreme cases, some can literally get away with murder.

Accountability is the realm of managerial leadership. Managerial leadership is about delivering the work while positively impacting others. It is the work of a professional management class that I champion. Too often, it is overlooked and left to chance. Too often, it is not adhered to. The management side of the role defines Accountability and Authority, and then the application of leadership, where we are authentic, servant, and transformational, brings it to life through others. When these two are not in concert, things get off-kilter.

It is hard to express the nature of Accountability in these short missives but, if any of those pain points ring true for you above, I suggest you look first at the nature of Accountability in your organization. It is about getting to the root of the pain and not applying mere plasters. Accountability work is hard but, like any pain, an ounce of prevention is worth a pound of cure.

Cheers,
Julian

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Exploring Responsibility

1 November, 2024

I received many responses to last week's missive about Accountability, so this week, I will continue in the vein of Accountability by looking at its partner, **Responsibility**.

Responsibility is a key component of Accountability, but they are not the same thing. Responsibility is not about the relationship between the leader and the led; rather, it is internal to all of us. Responsibility is our internal driver and we are all driven differently by these internal forces.

In relation to Accountability, Responsibility is our personal feeling of obligation. Accountability steers our sense of obligation and is important in organizations to enable the achievement of Strategy. Without the guardrails of Accountability, this internal driver can be dangerous and unreliable.

Last week, I commented that our world's problems result from a lack of Accountability. When the internal driver is unfettered, we can get abhorrent behaviour. This week, I was given an example of an Executive showing favouritism to one of their Direct Reports. In another case, a different Executive laundered money. These are corporate examples, but it is easy to see how this applies in politics or down to behaviour in our own families.

We all have different levels of internal ethics and, ironically, we see in our world people working in their self-interest. The notion of the greater good is often overlooked to position that self-interest.

Hence, Accountability is needed to provide those guardrails to ensure the greater good.

That said, there is a fine balance in hierarchies where the leader needs to work to ensure the best interest of the led. When this fails, self-interest comes to the forefront. That self-interest grows when leaders don't fulfill their Accountability as leaders. In turn, this occurs when the leaders are not held to account by *their* leaders.

Accountability is not just for the 10 to 20% of employees who are driven by self-interest, just as it is not needed to curb bad use of Responsibility. It reinforces good use of Responsibility as well. The act of Accountability is to acknowledge when someone does well. It reinforces good decisions and performance.

The handoff that occurs between the definition of Accountability and someone's commitment to do what is expected of them is the realm of Responsibility. A sense of Responsibility is essential to commitment; commitment cannot grow out of fear. The exercise of Accountability, where the leader acknowledges things done well, is what enables it. Therefore, catching people doing things *right* is the work of the leader to enhance commitment.

So, how do you get the productive Responsibility you want and need, and not the self-interest sense of Responsibility? It is all about dialogue. As I like to say, in a pool game, anyone can bash a ball around the table; the real art is calling the shots ahead of time. Therefore, you need to establish standards of expectation upfront – that your employees are accountable for the work you give them in exchange for a pay cheque.

Here are a few things to consider:

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- You are accountable to your manager for your Direct Reports' behaviour, so you need to set context.
- Be straightforward and clear on acceptable behaviour and what is not. They aren't mind readers, and their beliefs and ethical compass are different than yours.
- Resist the temptation to think they should know better, and be clear with them about what you expect.
- If you sense there is an issue, deal with it, don't wait for all the data. You might be wrong, but you are more likely right.
- Remember, the issue you walk past sets the standard you expect.

You will need to be clear about what is acceptable and unacceptable. However, you can cheat by bringing the team together and getting their input. Ask the team how they define acceptable behaviour and codify it.

My final piece of advice is to do this as soon as possible. If you are looking for a reason to have this conversation, I suggest you use this missive as a galvanizer.

Clarity is a gift and a right of every employee, so don't wait to provide it. When you do, you will enable your people to flourish.

Cheers,
Julian

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The Importance of Remembrance

8 November, 2024

This week, I spoke at Queen's Park for the Province of Ontario when the Minister of Multiculturalism introduced new legislation to honour Canadian veterans in preparation for Remembrance Day.

I was there as a Director of Wounded Warriors Canada to represent stakeholder groups before the media and assembled other partners to outline the importance of remembrance. So, I thought it would be appropriate to share some of the contents of my remarks with you.

They are:

"Remembrance week is a very powerful and profound time for all Veterans. Like many of my peers, I don't consider myself a Veteran although, for 34 years of my life, I served my Queen and Country. To us, "Veterans" were the old and bold souls of the "greatest generation," those who fought in the World Wars. But times have changed.

Canadian solders, sailors, and aircrews have seen many challenging circumstances since those great wars, whether on peacekeeping operations, the war in Afghanistan, or even facing the demands of domestic operations. Most soldiers are humble – they did, or are merely doing, what they have felt called to do – to serve.

They have always had the backs of Canadian society, and should be celebrated every day, but Remembrance week is a special time of reflection. It is the time where the nation has an opportunity to give back to those who gave so much.

What is important is that the efforts of who have given their all for their nation be acknowledged. That is why this announcement is so important – it is a recognition of the nature of sacrifice for the greater good.

This announcement means so much because it acknowledges the nature of that sacrifice—the cost of service, both seen and unseen. The war in Afghanistan reminded us that not all injuries are visible. It taught us to see beyond the fallen and to recognize all who served, including those who live with the invisible wounds of duty and the stresses of service. Theirs is a sacrifice, too, worthy and requiring our urgent attention.

When the public recognizes the efforts of Veterans by wearing a poppy or attending a service you are honouring those wounded in body and spirit. It's a way of saying, "We see you. We remember." You are helping the healing of those "who gave their today for your tomorrow".

We at Wounded Warriors Canada have seen the toll of these unseen wounds not just on veterans but also their families. That is the raison d'etre for our national organization – to honour the fallen and help the living. Our team of trauma-informed expert clinicians have dedicated themselves to supporting our veterans and support networks through the dark days.

So, my final point is, for those Veterans and families out there struggling in this week – I urge you to reach out. There are multitude of programs and people to extend the hand and carry the torch with you. Reach out to battle buddies and get the help. You deserve it. You have paid a tremendous price.

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No one should suffer in silence; we are all here for you. Just as you had a brotherhood and sisterhood in your days of service, you have a fire team backing you up. We are in this together.

Thank you for the opportunity to express what's often inexpressible. Thank you for helping us remember those who gave so much for our nation and province. We can never forget."

In the run up to Remembrance Day, I hope you too will reflect on the nature of these sacrifices.

Have a great weekend.

Cheers,
Julian

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Accountability vs Responsibility Redux

15 November, 2024

This week, I had the opportunity to speak to a large leadership team in Pennsylvania. Of course, the topic was **accountability**, which we at Forrest & Company are all about.

I always preface these talks by stating that lack of accountability is the root cause of all the problems in our world.

Many organizations like to make accountability a corporate value or a guiding behaviour. Still, just as words are metaphors for our thoughts, there is rarely clarity on what it really means.

When I say it is the cause of all the problems in the world, I mean because, at its root, it is about holding someone to account for their work or behaviour. Yet so much that is written about accountability belies an understanding of what it means to hold someone to account.

Even as I asked this week's group, they inevitably defined accountability as a feeling that comes from inside us. The majority of publications use this definition, too. For Forrest & Company, however, *responsibility* is about that internal personal feeling of obligation, not accountability.

Responsibility puts the onus on the individual.

In fact, this view abrogates the role of the managerial leader. We expect employees to have this amorphous feeling of personal commitment, as opposed to the clarity of what is objectively expected of them.

The role of the managerial leader is to define the expectations for the employees but, instead, we create an organizational value where the employee is expected to intuit the expectation.

The real problem with this narrow belief that it comes from the individual is that we are all different, diverse, and all have our own unique levels of commitment.

Therefore, accountability is essential for management to set clear expectations through a dialogue between the leader and the led. Recognize that accountability is really about "*holding someone to account*."

If you see accountability as being held "to account" then there need to be consequences for actions. While often perceived that way, not all consequences need to be negative. Consequences need to be a spectrum of both positive and negative. If we fail to acknowledge when someone does something right or positive, we are also not holding them accountable.

Holding "to account" is about behaviour. We can't expect to know someone's intent, just how they behave. Far too often, we accept bad behaviour for great output, which impacts trust and creates issues in the workplace.

When observing behaviour, leaders need to use their judgement and discretion to judge the effectiveness of their employees' actions. In accountability, it is essential for leaders to make a call and have the necessary conversations to either reinforce the good behaviour or deal with the bad behaviour.

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I won't go into the details of why leaders don't do this. But the first thing to ask is whether we are creating a chain of accountability in our management. The chain starts with the manager of managers.

If you want to achieve the organization's Strategy, management needs to exercise accountability and avoid leaving it to chance that someone is driven internally in a particular direction.

Once organizations go down the true path of accountability, they realise that many of the systems, policies, and processes work against accountability. That is why we refer to it as the Accountability Management System; it impacts compensation, organizational planning, leadership development, and talent management systems to name a few.

So, as a managerial leader, ask yourself: *Am I clearly outlining my expectations? Am I holding my people to account? Am I comfortable using my judgement and discretion? Am I exploring their behaviour and not just their output?*

This is some food for thought for your weekend.

Cheers,
Julian

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The Need for Managerial Leadership

22 November, 2024

For the last few weeks, I have been writing about the nature of accountability and how it differs from responsibility. This topic emerged from a series of talks I have given in the US with a major insurance company. The responses over the last two weeks have confirmed to me that there are indeed issues around accountability out there. This lends credibility to the idea that not holding people to account is a major cause of issues in both society and business.

In business, holding to account is the work of managerial leaders. Holding to account requires applying both positive and negative consequence for the behaviour of our direct reports.

This week, I wanted to explore why managerial leaders don't do this necessary work.

Here are my insights:

1. **There is a lack of managerial leadership as a profession**. We are too focused on our technical know-how and overlook our accountability to managing both task and leading people.
2. **We don't value managerial leadership**. Many people in leadership roles don't value that work. They believe employees should know how to get on with the job. In other cases, they don't want to be the boss; they don't want to tell people what to do.
3. **Poor role modelling**. Many of us have had that boss who says, "*don't worry, I will tell you if there is a problem*." In other words, we abrogate our accountability to nurture and grow people, preferring instead to hide behind closed doors and spreadsheets.
4. **Anaklesis**. "*The fear of damaging relationships*" becomes so strong that we are worried about the impact that we will have if we apply negative consequence, believing our employees will leave us.
5. **The absence of accountability**. Our own managers don't hold us accountable to be good managers. This is, I believe, the biggest issue in accountability. It is likely because of the reasons above, but it creates organizations where we rely on superhuman responsibility, where people step up and are driven by their innate belief systems.

The issue with relying on people's sense of responsibility and not applying accountability is that we are all different. If you wonder why there are issues of integrity in our world, it is because we rely on people's internal drivers, and we are all driven differently. Accountability ensures there is a common standard for the common good.

Accountability is a chain; it must cascade down through the organization. While it can exist on its own in the middle or at the front line, it can only deliver the Strategy when it is driven from the top. Far too often, CEOs and Executives expect accountability but are unwilling to drive it. They, too, must apply the good consequences and the bad. If you want productivity, great culture, effectiveness, efficiency, adaptability, and trust, you need to practice it and ensure it gets practiced throughout. Any break in the chain of accountability is suboptimal.

Managerial leadership is a role and is required for the success of all endeavours. It is important to remember that, as a role, it isn't so much about us as about the work we are paid to do.

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At the same time, our people need clarity of accountability to understand what is expected of them. Accountability is a covenant between the leader and the led. The application of consequence, both good and bad, means that we need to practice authentic, servant, and transformational leadership.

So, your question for this weekend is: Do I suffer from any of the issues above, and if I do, what should I do about it?

Have a great weekend.
Cheers,
Julian

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Organizational Health

29 November, 2024

This week, I am continuing my exploration of accountability and authority through another lens of **organizational health**.

In our client work, we ask all our clients about their organizational pain. Over almost two decades, we have gathered lists of pain points. While every organization has their own pain, we see eleven that generally impact all organizations.

The common pain points, in no particular order, are:

- We are overloaded, i.e. too much work
- Our management is ineffective
- We are in unproductive meetings
- There is a lack of decision-making
- There are squabbles over resources
- We are moribund in process and systems
- There is no innovation; we are doing the same things
- We are not hitting our targets
- We have an unclear strategy, and implementation fails
- There is a lack of talent
- There is acrimony and in-fighting

Usually, we ask: whose problem are these? Ironically, the leaders then say that it is their own problem, the problem of managerial leaders. At its root is the lack of accountability.

As I like to say, "*There are no bad organizations, only bad management.*" So, as you look at the list, ask yourself which ones reflect your organization.

While I prefaced that the list was in no particular order, the oft quoted #1 problem is the first point on the list. Everyone is feeling overwhelmed with work. Often, leaders are in the worst shape here because they often take on their direct reports' work as well as their own for various reasons. The most common explanation is that they feel their direct reports have too much work, so the leader takes it on.

In all cases, the issue is the nature of rampant responsibility, that personal feeling of obligation. Leaders do it from this internal driver and sense of “right” rather than what is required or directed.

Organizations are hoarders. We hoard work, and if we have no one to exercise continuous improvement, our cups just continue to overfill. Continuous improvement is like pruning a tree to enable new growth – if you don't cut some things out, you can't add more.

Continuous improvement means that we have to challenge what we are doing and ask if it is necessary, or just what we have always done. A lack of continuous improvement represents a lack of decision-making and a lack of priority setting.

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No matter where you are in the organization, you need to be continually asking if the work being undertaken is really necessary.

The role that is accountable for continuous improvement is that of the manager. As an employee, I might choose to cut something out that may be essential without knowing it is essential. My leader needs to lead me and make those decisions.

Continuous improvement is the work of managers; it is not a program for all employees. Yes, we need the best advice from employees where they see opportunities for improvement, but we must make the decision.

Far too often, managers are disengaged from the work their people do, but it is the foundation of accountability. Ultimately, the output of accountability is productivity.

Organizational health comes from the exercise of managerial accountability. We can't hope that things will change; management intervention is required. Our job is to remove the pain to enable productivity.

You can't get to perfection by merely listing the pain; rather, you must make progress. So, what will you tackle first to make your workplace a great place to work?

Have a great weekend, and Happy Thanksgiving to our American cousins.

Cheers,
Julian

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Assigning Authority

6 December, 2024

Continuing my ongoing missives on accountability, this week I want to discuss the flip side of accountability, which is **authority**.

By authority, I am referring to legitimated power. The key word there is *legitimated*. It is bestowed on an individual. We are not doing this to demonstrate our own power, but to ensure that our people have the necessary and correct authority to do their job. We bestow authority in a rational and measured way.

Authority is critical to accountability. If you are holding someone accountable for something, giving them the appropriate authority is only fair. Unchecked authority can be dangerous in organizations where responsibility or personal accountability is king.

Authority becomes a form of right for the individual with accountability. In the sense of responsibility, if authority is based solely on what we believe is correct for us, we can take all sorts of actions because we believe it is the correct thing to do.

More importantly, authority represents the control an individual has over their circumstances. It is a very powerful tool because it should express what the individual has control over in their environment.

Authority is a critical tool in engaging our direct reports. When I know what control I have, I feel more engaged in my work, and it reduces wasted energy and productivity. It enables decision-making and reduces overloaded work because I know my guardrails.

Broadly, there are basic authorities I need to function in the organization. As an employee, if I am accountable to do my best work, I need:

- Clarity on my work and resources
- Help from someone more capable than me when needed
- A right to appeal to my manager-once-removed when I am in chronic difficulty with my manager
- To be safe physically, emotionally, and socially

When my manager ensures and protects these authorities, I can get on with the work and put all my effort into it.

In addition, as a manager, I also need specific authority to hold my team accountable, and to be accountable for my team's output and working behaviours. Therefore, I need to:

- Be the only one to assign tasks to my team members
- Be the one who chooses the consequences, both good and bad, for my team
- Be able to initiate the removal of someone from my team
- Be able to veto the appointment of someone to my team unless it is for their developmental reasons.

These are only the starting points of authority. In the vein of the main authority of employees to be clear on work and resources when it comes to my tasks, I must have clarity on:

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- What are my decision rights, on work or resources;
- Who and where to get service from in support of my work;
- The ability to bring people together to assist me in my work (these are usually the authority to call meetings);
- The clarity of ability of who I can tell to pause or stop if their work is counter to my plans and work;
- The ability to give unsolicited advice based on my unique skill set, and
- Finally, if I have the power to tell someone to stop doing something and do something differently if their work is dangerous to others

These 6 authorities represent the keys to productivity. When they are unclear, they reduce productivity and require us to spend inordinate amounts of time managing relationships. The key here is that they are not about me, but based on my work and what I am accountable for in delivering the organization's strategy.

Just as with accountability, organizations rarely take the time to clarify what authority the individual has. In an age of struggling with productivity, the clarity of authority is essential in enabling people to get on with their work.

Far too often, we rely on our employees' goodwill to sort these out themselves. This burdens our employees emotionally as they try to navigate their work with their peers. And, when we leave it to our employees to sort it out, we have abrogated our accountability as managers and reduced clarity for our teams.

At the outset, this may appear too mechanical and too stultifying, but it is freeing to the employee. It enables employees to focus on what is important: the work. They don't have to worry about navigating issues of authority with their peers.

My final point is that this can look like a lot of work. It is, but perfection is not the aim. Progress comes from starting it and revisiting it regularly.

If you still need convincing, ask yourself how clear you are on these authorities. That will answer any concerns you may have.

Have a great first weekend of December.

Cheers,
Julian

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Defining Authority

13 December, 2024

Last week, in my study of accountability, I dealt with the flip side of accountability: Authority. Authority is legitimated power. At its crux is the ability to control what you are accountable for and the foundation of fairness in organizations.

Authority is key to empowering your people. It is about giving them the guardrails for their work.

But, based on last week's missive, I received a great question. "*If authority is so essential to accountability and fairness, why don't leaders define it and protect it?*" It's a great question with many levels and layers.

Many managers believe they have empowered their people only to place them in a difficult situation. Often, we don't define accountability and commensurate authority, which is, in effect, the sandbox the employee has to play in.

Sometimes, we give them too small a sandbox, thereby constraining them. But often, under the guise of empowerment, we leave them in the Sahara. We just let them go to figure it out.

So, to answer why we don't define authority, let's use the examples of the relative sandboxes.

The too-small sandbox, where we constrain our employees, offers one of the biggest insights into the dynamics of authority. So, if we do define the box as small – perhaps too small for the capability of the individual – it can be for some of these reasons:

- We feel small ourselves; we lack confidence in our abilities, so we limit others as it feels safer
- We don't have the capability to define the expectations of the work, so we limit the risk by limiting the expectations
- We don't trust our employees, or we notice they think differently than us, so we need to keep them under wraps
- Finally, we don't have the time; we are too busy doing busy work, and so we limit the work of others inadvertently

By making the sandbox too small, we are at least defining accountability and authority. The issue is that we are probably not making the work fit the capability of our people. If it is too small, we have not measured the individual's capability correctly, or we may have been fitted to the wrong size sandbox ourselves.

In the case of putting the employee into the Sahara, then it is likely from any of these reasons:

- Again, we don't have the capability to define the work. We may have been put in our own Sahara
- We don't understand the impact and implications of not defining accountability and authority on our employees
- We don't understand that this is the core of our role as managerial leaders, and we believe that words like "empowering" make us great leaders

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- Finally, again, we don't have the time to define parameters, so we launch them into the desert and hope for the best

There is a common thread in both the small and big sandboxes: We don't have the time, and we don't take the time because we don't see it as our work. Instead, I have noticed that we are too interested in being technocrats, such as finance, marketing, or operations managers, rather than true managerial leaders.

If you are in the business of managing the work of others and leading them to achieve it, then your core toolset is accountability and authority. Just like Goldilocks, you ensure they are “just right” – in the right sandbox with all the tools they need to succeed. The tools are their authority, and those tools are the power you empower them with.

My final thought is that the manager is often the last to know that there is an issue. They assume all is going well and that their people are naturally clear. In my experience, they are not; it is important to ask. The higher you are in the organization, the more you need to ask this because those with the least real control often are the least clear about what is expected of them.

So, ask yourself this week: Do any of the reasons above resonate with me, and what will I do about them?

Cheers,
Julian

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Leader Self-Care

20 December, 2024

This week's Managing the Maelstrom will continue the theme of accountability and responsibility but from a unique angle. Given that it is the start of potential vacations and family get-togethers, I will focus on one form of responsibility: **Leader Self-Care**.

Leader Self-Care is the responsibility of every managerial leader. It is a personal feeling of obligation to care for ourselves. It is a responsibility because no one holds you accountable for your self-care.

Over the holidays, as we prepare for the upcoming New Year, now is a good time to focus on ourselves so that we are recharged and ready for the challenges that 2025 will have in store for us.

I have observed that many managerial leaders have been working hard this year to achieve goals, close deals, and finish the year with a bang. I also see tremendous effort expended caring for employees. As the holidays are upon us, it is time to rest, recoup, think of and care for ourselves.

Rest can take many forms. It doesn't just have to be about sleeping, although that's a good starting point. If you have proverbially been "burning the candle at both ends", good solid sleep is an important way to recharge your batteries. Sleep is an important part of keeping me fit cognitively and emotionally.

In my early army days, I learned the effects of sleep deprivation. I saw how it impacted me physically and emotionally. Once that starts to happen, it hurts mental acuity, and decision-making can falter.

But as I said, rest doesn't have to be just sleep. It comes from breaking routines that you have built up over the year. Here are some thoughts on types of rest:

- Doing new creative things can be restful
- Physical rest means getting out and getting exercise
- Sensory rest can be about shutting down screens and getting out in nature
- Emotional rest is about being aware of your emotions and how they are impacting you

Social rest is the one important form ideally suited for the holidays. This can involve having time to yourself as well as connecting with others you have not had time for in the past. Often, this time of year is important because we reconnect with the people who care for us the most.

In Chapter 7 of my book, I wrote about leader self-care and its importance to being a good managerial leader. If you can care for yourself, you will be in a better position as the leader of your people.

Again, this is not accountability; it is our responsibility.

So I wish you the very best over the holidays. Reconnect with others and get those various forms of rest.

As my contribution to your sensory rest, and to also practice what I preach, I will not send out a missive next week.

Happy restive holidays to you and your family, and I wish you all the very best for a terrific 2025.

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Cheers,
Julian

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