



**2023**

# **Managing the Maelstrom**

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# Transformational Leadership and Flourishing

6 January, 2023

I am continuing my study of human flourishing through leadership. Too often, we overlook the crucial role that good managerial leadership plays in our daily work. We assume that employees will naturally go in a direction and miss that they need to be led.

I explored the cause for this in [my book](#) but, at its root, is that we don't see that we are within the managerial leadership profession, which includes both managing and leadership. For the last few weeks, I have been arguing that, in this day and age, we need to practice a specific form of managerial leadership, which is Enlightened Leadership.

Enlightened Leadership enables our people, and us, to flourish and grow. Flourishing is where we all achieve our full potential and ultimately live the lives we are meant to fulfil. Enlightened Leadership is made up of three critical elements for our growth and the evolution of others. I've spoken about Authentic and Servant, and, this week, is about the quintessential component of flourishing, which is **Transformational**.

Transformational Leadership is leading people from a current state to a future desired end state. It is about developing ourselves and others to their full potential. Moving from a current to a desired end state isn't about imposition; rather, it is collective discernment of a mutually agreed upon future.

Leadership, by its nature, is transformational; it is about creating change. It requires us to:

- Challenge the status quo
- Envision a new space
- Enliven opportunity
- Seek better
- Encourage risk

These are all the elements of Transformational Leadership. Transformational Leadership sees the potential in their people and brings that out in them. It relies on the golden rule of leadership that I discuss frequently: "*know your people and promote their welfare*". You need to know them to grow them.

Transformational Leadership recognizes that we are all on a journey and that there is no such thing as perfection; we merely develop over time. To practice Transformational Leadership you need to do these things:

- Visualise a Future State and map what it takes to get there
- Preach your vision with passion
- Ask the hard questions of yourself and others
- Challenge the status quo
- Model the behaviours you want to see from your people

Last week I talked about our flagship leadership development program [The Leadership Path](#). In the program, we encourage participants to reflect on who they want to be as a leader, and the year-long experience intends to help them transform into their ideal selves. To do this though, they have to reflect.

So again, I encourage you to reflect this weekend. Ask – What I am I doing to transform myself to what I want? What am I doing daily to transform my people so they flourish and grow?

Have a great weekend, and consider how you will transform to flourish and lead others on their journey.

Steadfast, Vigilant, Adaptive, and Optimistic.

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## Worldwide Flourishing

13 January, 2023

Over the last four weeks, I have been writing about flourishing and the natural role of leadership in bringing it about for your people. This week I am going to set the level higher. How do we enable organizational, community, and worldwide flourishing? Why is this important?

Why should the world around us flourish? By flourish, I mean our world growing vigorously. To do that, one has to look at the environment in which we live. One can only succeed if the domain is conducive to growth. Therefore the organization, community, nation, and world need to create that environment that encourages flourishing.

This is analogous to our leadership development experience at Forrest & Company. We spent years, and I spent a good part of my life, helping leaders to grow only to find that, once released back into their work world, they ran into the wall of systemic interferences to them being who they truly wanted to be. As a result, we define not only strategy and structure, but how things work to enable leaders to grow and be successful.

Human flourishing is not a zero-sum game. As we are learning through environmental and sustainability groups, it is not either-or; you cannot have one without the other. We must use systems thinking and see ourselves as part of a system, not just individuals.

So why is human flourishing important? This is as much about pragmatism as it is about ethics. When people are growing, they are doing great works, engaged (using their discretionary efforts for the greater good), and healthy. They are not lashed to their oars or working in a dark satanic mill. With healthy and expanding people, and good managerial leadership, the profits begin to grow but, as I have argued above, there is a symbiosis that goes beyond just the people and profits to the planet because that is the environment. So, how do we get there?

The short answer again is leadership. It is also again about Enlightened Leadership. The leaders that will help our world to flourish will need to be enlightened. My simple definition of enlightenment is about being modern, rational, well informed and full of exploration. We need leaders willing to be enlightened and take people further to help them stretch and grow and remove the roadblocks to their success. The starting point is at the individual, but it gets bigger from there. It isn't only about the people, but their interrelationship to the systems, the work, and the tasks ahead.

While flourishing requires a type of leadership to enable the people, it also involves an element of management to set them in the work they must do. The two come together in Managerial Leadership – while the people side is leadership, the system side is management. The two have to come together for success.

Flourishing can be a big topic but, as the old adage goes, you need to eat the elephant one piece at a time. If you want your people to flourish and grow, you need to understand them first. On your journey to help them, you will have to look further afield at what else needs fixing and this is where your managerial skills will be required.

I believe it is imminently doable, but we have to start, and we need to start before it is too late. To help our people flourish, we will need to address our organizations and our world. To do this we will need to be enlightened and exercise Managerial Leadership.



Wishing you a great weekend. Steadfast, Vigilant, Adaptive, and Optimistic.

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## Anaklesis

20 January, 2023

In my ongoing discussion of flourishing, I want to address an issue that has been much on my mind and the minds of our clients for the last year. People have become impassioned by it, angered by it, and derided it, but it is a common question I get asked about. The issue is returning to the office.

The heart of the return to the office debate is **Anaklesis**. In previous missives, I have discussed this concept. Anaklesis is the need to lean on things. Human beings lean on two things: our beliefs and opinions, and our relationships with other humans. Leaning means relying on these to help us feel stable and secure. Anything that goes against our relationships or our beliefs destabilizes us.

Anaklesis hit hard in March 2020 when the pandemic suddenly disrupted our work and lives and put our connection with others in jeopardy.

Anaklesis affects us as employees in return to the office because we have become accustomed to working from home. After three years, going back to an office can be destabilizing. We are comfortable with our rituals and routines and rationalize that working from home can be more beneficial.

For management, the fear of damaging relationships means we are very cautious when discussing returning to work. Employers are concerned about forcing people back for fear of damaging these relationships and losing talent.

These are just two sides of how Anaklesis impacts our view of a return to the office. There are nuances here but, at its simplest, it is binary.

I have gathered a variety of arguments from both employee and employer perspectives. In conversations with employees, I believe there are four patterns of perspectives for both staying home and hybrid:

- I need / prefer the flexibility to manage my life
- I have grown comfortable and accustomed to my life working from home
- I can be much more productive
- I waste less time in transit, and it is healthier for me

The employer perspective has ranged from :

- The need to be together to work cross-functionally
- The need to reduce silos
- The ability to get things done as a group, and frequently,
- We have all this space, so we better make good use of it

I don't believe there is a right or a wrong answer. Using flourishing as the lens, however, is a matter of making sure that the employee will grow and reach their full potential, whether at home, in hybrid, or in the office.

That must, of course, balance with the organization's Strategy. So, return to the office can only be considered with an understanding of the nature and intent of the organization. Many organizations have fallen into their return-to-office ritual without consideration of what they want to really be, and I suggest that this is the governing aspect for any return-to-office policy.

So, consider the balance of flourishing for the individuals and the Strategy for the organization on the other end. The organizations that manage this balance well will be the ones who win out in the long run.

I look forward to hearing your feedback from this week.

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Steadfast, Vigilant, Optimistic, and Adaptive.



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## Flourishing and Role Clarity

27 January, 2023

Continuing on my 2023 theme, I read an interesting article on Flourishing sent to me by a good friend at the Flourishing at Work project. Dr Tyler VanderWeele wrote the article in 2021; he is the Director of the Human Flourishing Program at Harvard University.

One of his arguments is that work distraction costs businesses even more than injuries and physical health. For example, a \$6 billion company lost \$16 Million to sick time and an estimated \$307 million to distraction. Distraction is a form of disengagement where we are caught in the turmoil of work and lose productivity. We become disengaged if we cannot grow, develop, and enjoy our work. In effect, we no longer flourish in our work.

In previous missives and my book, I have pointed to the problem of sanctuary trauma, where employees go to work expecting sanctuary from their daily challenges only to find that work only heightens the trauma.

When managerial leaders create an environment where employees must fight for resources, worry about their relationships with their peers, or waste their valuable time, employees become disaffected and managerial leaders are not doing their job.

The role of managerial leaders is to be impediment removers to enable execution by our employees. Expecting employees to sort out their issues on their own in an organization is fundamentally unfair. They are hired and spend their lives trying to do the work of the business. Managerial leaders are the professionals who enable the work to get done. In effect, the role of managerial leaders is to ensure people flourish.

The simplest way managerial leaders can help people flourish is through what we at Forrest refer to as Role Clarity. Role Clarity is ensuring our people know the expectation for their work and what they are to deliver. Too many times, we find this is a big gap in organizations. The gap manifests itself in these types of comments:

- What is the priority?
- Whose decision is this?
- Why am I in this meeting?
- What resources do I have to do this?

Real Role Clarity answers these questions. By using Role Clarity to answer these simple questions, you empower people to get on with figuring out how to do the work. In business, the work comes from the Strategy, and so it must emanate from management. This doesn't mean that employees don't have a say – truly professional managerial leaders expect and demand the Best Advice from their employees on what needs changing in all aspects of the business.

People cannot flourish in an environment where their work is unclear and, while there needs to be a certain amount of ambiguity, it is not abrogation. Management's job is to set the conditions for people to flourish in their work, where they are not distracted by office politics and interpersonal challenges. When these happen in organizations, management has abrogated their accountability to ensure their employees are physically, psychologically, and socially safe.

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There is a real cost to a business, not just financial but also reputational, if we don't help our people flourish and we enable Sanctuary Trauma. It can't be an employee's sense of obligation to resolve work issues – it is the role of management. Here too, management needs Role Clarity to understand their role.

Role Clarity is essential for humans to flourish at its core is purpose and we all need to be clear on our purpose. So this weekend, ponder whether your people really know theirs.

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## Return of Investment of Flourishing

3 February, 2023

I was on a very interesting call this week, the virtual meeting of the “Flourishing at Work Global Community”. This is an extension of the Humanity 2.0 institute I have been involved with for several years. It was a terrific opportunity to hear from a multi-disciplinary body about the challenges of flourishing at work.

Marie Gill, the host, had asked me to lead off based on last week’s missive concerning Role Clarity and, this week, the twist was how to demonstrate the ROI of human flourishing at work. The cases are compelling, from engagement, to the mental wellness imperative, to effectiveness and efficiency.

At Forrest & Company, we speak of the essentials of business: efficiency, effectiveness, trust, and adaptability. Having employees grow and develop in the workplace covers all four of these.

- Efficiency – engaged employees will be more efficient in their work
- Effectiveness – employees who are growing and see value in their employers will be more effective
- Trust – if I am encouraged to grow and flourish, I will trust my employer more
- Adaptability – if my needs and desires are met at work, I will be more focused on the work and likely to recommend changes to enable the organization to change and adapt

I hold these to be truths but, for those that demand proof, you will have to reach into your thinking and see if this is true. The data will be there in time, but does it make sense to you?

The key here is in defining what people need and desire. People need clarification on these two things and are relatively uncomfortable describing them. I believe that bringing flourishing into work is not a project. It is founded upon the individual at the centre, and no amount of programming will capture the diversity of what everyone needs and wants. Instead, the best place for flourishing at work to reside is in our managers.

The manager is the best to know their people and promote their welfare. We must stop the assumption that management can’t be trusted to care for their people. When you are untrusting, you make others untrustworthy. This is not the job of Human Resources; this is the work of managers.

Many business books and gurus decry Management as evil and inhuman. Management by itself isn’t evil. Its role is to balance the tension between task and people. I am not Pollyanna here – there are countless examples of where the task side overpowered the concern for people, which is why we have unions and collective bargaining – however, I would argue that those who discount people in favour of task should never be entrusted with the sacred covenant between the leading and the led.

So now, back to ROI of flourishing, if it becomes a way of operating rather than a program, there is no need to be concerned about its costs and returns. Here is why, if your management balances the tension between tasks and people and at the same time helps people to grow, it will cost you nothing. Instead, I would argue you are finally getting your money’s worth out of your management.

For the detractors complaining that this gets in the way of managers doing their work, I argue, as I mentioned last week – “you lack role clarity”. The role of managerial leaders is to delegate work, provide context and priorities,

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and define the end state of work. These are what engaged managers do. Enlightened leaders fulfill the relationship with their direct reports by exercising authentic, servant, and transformational leadership.

So the ROI is really about improving your management's efficiency and effectiveness, which leads to trust and adaptability. It costs you nothing. You are merely redirecting them to do what they should have been doing. To quote Nike, it is a case of "just do it".

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## A Covid Reflection

10 February, 2023

I have taken my own oft-given advice, and this week I am off with my family for March Break, but I realise we have had an anniversary, so I thought I would make that the point of this week's missive.

We just passed the three-year mark since COVID-19 upset our worlds, so I thought this week I would resend you the very first missive I sent out on the 13th of March 2020.

It is still, I believe, quite relevant three years later. Here it is:

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

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

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

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

Even though the height of the pandemic is over, we still face myriad challenges and the above advice is still applicable. Take care of yourselves and your people.

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## The Age of Discontent

17 February, 2023

An issue that has puzzled me since the pandemic started is the appearance of an Age of Discontent. Since Covid emerged, there is a feeling of greater disquiet in the world. It seems more pronounced, and it has manifested itself in all sorts of forms. Everything from public riots and demonstrations to a sense of general upheaval. Anger and violence seem to be all that the news carries these days.

I question what has been going on to help me understand what the future might have in store. In these three years I have been hypothesizing "why?", and so I chose this week to share my thoughts.

One natural cause is what we at Forrest & Company refer to as **anaklesis**. I have written past missives on this, and it is key to [my book](#). Anaklesis is the very human need to lean on things to prop us up and make us feel whole. We have difficulty with anything that challenges that stability. At its core, we lean on our beliefs, opinions, and experiences.

We have seen that Covid and the aftermath has been a destabilizer. Old beliefs and opinions went out the window, and yet we clung to them. Any forces that added to the disruption of what we felt created an emotional disquiet, an internal churn, and disruption. For some, including myself, this sometimes boils over into annoyance or anger and can be even bigger in other cases.

This disruption is an emotional event that has continued to manifest in various ways. In a previous missive, I used the line from the movie Network – the outburst *"I am mad as hell, and I am not going to take it anymore!"* The message of Howard Beale is irrational but it is the nature of that very human emotional side of us.

Humans are tremendously adaptable beings. However, adaptation takes energy and, as we are learning, everything has a limit. Dealing with this stress burns energy, wears us down, and frays our resiliency. It takes us from a place of proactivity and makes us more reactive.

When we approach the changes and challenges of the world by reacting to them, of course they are going to feel more uncomfortable. The changes feel like a barrage in place of those core beliefs and experiences on which we had been able to rely. Our ability to prepare based on predictive behaviours/activities is eroded so we feel like we are flying by the seat of our pants in response. We can't rely on traditional methodologies or behaviours; we have to create new ones. And this is daunting because of the unknown.

Covid was a trend accelerator; things that might have taken a lot longer to develop sped up and left us with nothing to lean on. This is, I believe, what we are feeling.

As we go forward, the hope is that we will overcome our anaklesis, embrace our new realities, and build new foundations on which to lean.

I look forward to your insights and thoughts on this because if we can crack it, I believe we can imagine a brighter future.

Steadfast, Vigilant, Optimistic and Adaptive.

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## Talent Retention

24 February, 2023

We are at the end of March, and I have struggled to find the right topic for this week's missive. So, I will reflect on a topic I was involved with this week. I had the opportunity to present to the Electricity Human Resources Canada membership on the issue of talent retention.

While the electricity sector has struggled with the issue of employee retention before Covid, it has been heightened in the post-Covid era as employees retire in droves. On top of that, employees who have stayed have had a change of heart and see other ways to spend their time. In effect, the sector is facing a shortfall and is trying to figure out how to resolve the issue.

The electricity sector, while full of massive opportunities given the greening of our utility sector, is not alone in the challenge of retaining employees. I have had numerous discussions with CEOs struggling to keep their good employees in the face of new market challenges.

We have seen a lot of change in all sectors over the last three years, and even before. As you have seen me argue in the past, Covid has done two things: it has been a trend accelerator, and it has changed how people see employment. As a trend accelerator, it has moved us forward to a world we had barely contemplated. If you doubt that, think about how you considered working from home before versus where we are today, or the amount of technology use we now take for granted in our daily efforts. It has changed how we see our work. Our priorities have been rearranged. Remember my comments that in Covid, not *everything* changed, but *everyone* did. What was once deemed important may have shifted in favour of another focus.

So, what did I tell everyone at the Roundtable? What you have heard from me before is that the key to the retention of employees is our managerial leaders. It is our managerial leaders "at the coal face" who make the connection with our people. They need to "*know their people and promote their welfare*". This is not a one-off training program, but a concerted, ongoing effort to make our leaders accountable for the retention of their employees. It starts by knowing them and ensuring they are integrated to the work. It is listening to them and accommodating their needs, and providing the necessary resources. There are a lot more details about how they do this and, if you are interested in what those are, reach out to me directly.

Regardless, we need to focus on three things to retain our employees beyond engaging our management in the exercise: structure the work for employees, remove the barriers to their success and the processes of their work, and exercise good leadership. These three things help employees to engage, or reengage, with our businesses.

I have written extensively on the Flourishing at Work project. To reiterate, to retain our employees at work and help them prosper and reach their full potential, we need to structure their work related to the strategy, clean up the processes to enable them, and provide great managerial leadership.

These are the essence of our commitment and covenant with employees and, trust me, if we do them, we have a greater ability to retain employees.

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# Innovation in Canada

3 March, 2023

This week's missive is coming a day early, given that tomorrow (Friday) is a holiday.

Today's topic has concerned me for a long time. I found the voice for it in a lunch meeting with a good friend who runs an agency representing creativity and innovation in the Canadian Technology sector.

Our discussion roamed, but the key point was the question of *what is wrong with innovation in Canada?*

In my opinion, it isn't just in technology but in all fields. The lack of technological innovation will put us behind in the world, and our inability to realise new approaches is a worrisome trend.

Apparently, this is a huge issue in the technology sector, but I feel that it comes down to what is getting in our way as a nation. We are a nation of inventors, so what has happened? A country that gave the world basketball, the zipper, Universal Standard Time, and the telephone has stopped creating new things. For example, nowadays in the tech sector, something is invented here but, to be developed and marketed, it has to go to the United States.

I believe I have the answer as to why this happens and it relates to our thinking. In our work on thinking in the workplace, we have found that, statistically, Canadians think differently to other nations. In particular, our thinking style is about cautiousness, security in information, data, and the avoidance of risk.

Our attitude towards risk is at the root of why we are not an innovative nation. We prefer to play it safe. When we do take risks, we look for certainty. The problem then becomes that we need to be more willing to take chances. In the tech sector, this becomes banks and lending institutions being unwilling to take risk, and so the nascent technological creation has to go elsewhere and, most noticeably, that is the US, to get their funding.

I am using the tech sector to illustrate the point, but the real issue is that cautiousness is everywhere in Canadian society.

Now I am not advocating riskiness for the sake of gambling. In fact, history has shown that the cautiousness and regulation of Canadian banks protected Canada from the worst of the 2008 financial collapse and may well insulate us again in the near-term as banks experience difficulty elsewhere. However, I believe our cultural cautiousness will have second and third-order effects which may be damaging to the long-term health of our nation.

So what to do about it? It starts with all of us. We need to embrace risk and think through it. Risk unexamined becomes fear, and that fear can be debilitating. If we get good at thinking through potential hazards, we can make more timely and better decisions.

When I ask groups how they evaluate risk, there is often a stunned silence. So, we need to learn and practice otherwise the world will go past us. So, as you face risks, ask yourself;

- What is the worst thing that will happen?
- What is the likelihood of that happening? And,
- What is the severity if it happens?

If you do this, I think you will find, as I have, that the worst case isn't either so bad or so fatal. But, if you don't take the time to think it through, it will merely be a knot of fear in your stomach.

So, enjoy a long weekend and ask yourself, *how we can unleash our creativity back onto the world?*

Wishing you and your family a happy Holiday weekend.



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# Organizational Structure

10 March, 2023

Clients frequently ask me about the hot issues other clients are facing, and this week was no different. There are usually common themes, like the return to the office (which I will come back to in subsequent weeks), but this week I wanted to share with you what Forrest & Company recently keeps getting brought into – organizational structure.

Organizational structure challenges take many forms. They range from questions about how the organizational chart should be structured, all the way down to how to get the best work and flow from our teams. The common denominator in all of these, though, is about structuring work.

I believe the reason it is hot right now is some of the following:

- We need to improve our effectiveness – we are not hitting our targets
- We need to get better efficiency from the resources we have
- We are unclear because our teams are working hybrid, and we have not clarified the work well enough
- We aren't sure we have the right talent to hit our goals
- Are our teams just forming together and learning how to work with each other
- We need to align ourselves with a new Strategy or Operational Plans
- We realise the employee body didn't understand the Strategy before, or even their role in it

All of these are about how we align people to work. Clients come to us because they often don't have a framework for how they structure the work. We have seen, in many cases, that the decisions on structure often happen gradually over time without any real conscious thought, or have been rooted in intuitive cases overlaid with title and compensation frameworks. In other words, they have assumed that titles mean something and that compensation frameworks are the foundation of good structure.

People also come to us, however, because we use the science of Human Capability as the foundation and the need to align structure to Strategy, not Strategy to the Structure. The principles we use are sound, and they form the criteria for making decisions on how to align people to the Strategy.

As I outline in [my book](#), the premise is that the structure defines what roles are accountable for (the work) and they are derived from the Strategy. In turn, once defined, it is a matter of matching the right person for the role as best as possible based on their capability. Accountability is the key – whose role is to make decisions and use their skills, judgement, and discretion to figure out how to complete the role.

Equally important is to define what authority that role has over others. Accountability without authority is unfair and, conversely, authority without accountability is dangerous.

We use accountability to identify what sort of authority is required. This is key work and, while many clients often use the Project Management tool of RACI (Responsible, Accountable, Consulted, and Informed), its role is to curtail open responsibility. Instead, we go much deeper to explore and, most importantly, clarify what authority people have over others and what support they can get in doing their work. By doing this, we can unleash the innate capability of those who work for us all in the effort to deliver the Strategy. After all, authority represents to all of us the legitimated power to control our world.

The aim of all of this is to help others create great places to work that deliver the Strategy, but that needs to be done through the power of structured work.

So, take a moment and ask yourself these questions:

- How clear are my people on what is expected of them?

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- Do they know who to go to in order to get support?
  - Do they know their ability to confront mixed work priorities amongst peers?
  - Do they know whose decision it really is in their work?
  - Do they know who can call them to a meeting?

These are all the hallmarks of authority, and form the foundation of real Role Clarity which, while always being critical, is doubly important in these more chaotic days to helping organizations achieve their Strategy.

Have a great spring weekend.

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## The Risk of Return to Office

17 March, 2023

This week's missive is an ongoing topic on our clients' minds and in general business – The Return To Office.

I was sparked on the topic by a visit to Calgary this week to find that most businesses there downtown have returned to office, ranging from 3 to 5 days per week. However, that doesn't appear to be the norm everywhere else, and many are still trying to finalize their policies.

One Head of HR described the situation as a catch-22 where no one wins. I have seen executive teams eager to see everyone back at 5 days, and employees who would rather be at home. Choosing one will certainly alienate another. But, what has puzzled me, is why so many have yet to make a final decision (although no decision is a type of decision).

The roots of the angst about setting a policy go back to the emptying in March 2020. At that time, no one had any experience in what was to come, and we all learned by trial and error. The same is true again because we have no experience and are looking for the elusive data and proof for the decision. The problem is that we will not have pure data even if we wait. After all, ask yourself, are there some days you would rather go to work and others not? It is the nature of being human.

As with every decision humans make (or avoid), the shadow of risk overhangs. As I said two weeks ago on another topic, "unexamined risk becomes fear". Fear then becomes debilitating for individuals and organizations.

Here, once again, is the prescription you may wish to use to decide your Return to Office policy. As we have seen from previous missives, this formula works with any decision.

1. **Identify what is at the heart of the worst thing that can happen** if you return to the office 3, 4, and 5 days a week. What is the worst that will happen if you leave it as it is? The point of this step is to avoid awfulizing and catastrophizing and to bring it to a point where you can examine it. Is it a fear of your best people quitting to go elsewhere if you demand them back in the office? Perhaps it's the fear of crumbling effectiveness or engagement if you let them stay home.
2. **What is the severity if this did happen?** Some things may be more probable but not as critical, and the converse can be true. So, make this feel tangible and real for yourself. This, again, will be a prediction, but that is all that you can do unless you have a crystal ball; you have to manage the risk of it. Using the loss of a key player as the example, this might be a 70 or 80% severity.
3. **What, then is the probability of this happening?** Make a guess or make a prediction. How realistic is the threat? If you need to make it tangible, create a percent likelihood just to remove it from your gut and to make it feel more tangible. Again, the probability may be assessed at 20% using the loss of a key player.
4. **Once you have found the worst-case scenarios, can you mitigate them?** This is where the planning comes in. What can you do to diminish the probability and the severity? This is where your creativity comes in handy. The more creative you are, the more you protect yourself, your organization, and your decision. So, what will you do to ensure you don't lose that key player?

Now, of course, it is easy for me to sit back and create this nirvana, but I am not Pollyanna. I have seen where this approach helps and remember Churchill's maxim if it goes wrong: *"Success isn't forever, and failure isn't fatal"*.

At the core of the issue of the Return to Office example above, that Golden Rule of Leadership comes out once more – *"know your people and promote their welfare"*

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Good luck with your deliberations. I look forward to hearing from you if you want more perspective.

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# The Importance of Good Structure

24 March, 2023

This week, I will pick up where I left off a couple of weeks ago. I had a lot of feedback on the missive on [organizational structure](#) and speaking with several clients this week reminded me of the topic. So, to further the exploration, I will build on the two themes in conversations this week – why structure is so important, and what causes poor design of teams and organizations.

## Why Good Structure is Important

This may be a self-evident truth for some people, but it isn't clear for everyone, so bear with me as I endeavour to outline it. Structure is where we work, not necessarily just the physical but the spiritual as well. Too often, it isn't thought through and, when it is not, it leads to the challenges I outlined two weeks ago. Good structure performs these functions:

- It provides the framing for our work, why it is important, and the context of it
- It defines what work we will do
- It defines how we interrelate with others
- It defines our career path and
- It defines our compensation

As a sidebar, in our experience, we often get called to solve interpersonal issues in teams and, ironically, it is really about the structure of the work. If you doubt this, consider the times when a new hire comes in and the team "storms". Usually, it is because we still need to integrate the new member into the team, and the team to the member.

## Why Structure Goes Wrong

So, if it is important, why does it go wrong? Below is by no means an exhaustive list but represents what we have seen in many cases at Forrest & Company. Companies find:

1. We have lost sight of the Strategy (what is important to our endeavour). Losing sight may mean it needs to be articulated, clearer or with changes – it feels like we have drifted off it.
2. We have beliefs in what a good structure looks like. These are usually faddish and often are passed from generation to generation as this is what it "should" look like.
3. It is based on incumbency. *"This employee has this skill, so we will have them do this"*. Pretty soon, they go from an individual contributor, fulfilling a function we don't need, to being the manager of that function, then as a Director, and then as a VP of function we don't need.
4. It is all about the titles. *"We should give people a title to recognize what they did"* rather than recognize them through good managerial leadership. Pretty soon, the structure has all sorts of titles, and you have no way to manage careers or identify equivalencies.
5. It is based on our process. The problem is that the processes keep growing and, if your structure is plump with management, pretty soon you have bureaucratic processes.
6. Anaklesis is rife. This is often related to 3 & 4, and it is [the fear of damaging relationships](#). In other words, we don't want to tell people what to do. So, we settle on letting them do what they like to do and not what is really needed.
7. There is a lack of continuous improvement mindset. In this case, we just keep adding more and more work rather than determining what is no longer valid and useful. The #1 pain point of employees, in our research, is they feel overloaded. This is a manifestation of that.
8. Finally, the overarching one is poor [managerial leadership](#). The job of management is to structure the work. Poor management means that we enable the other 7 to manifest themselves.

So, stay tuned if you want to see how to deal with these. Our solution is all about creating a great place to work where people can flourish and grow.

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Wishing you a great spring weekend. Steadfast, Vigilant, Adaptive and Optimistic.

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# An Evaluation of Structure

31 March, 2023

I wrote last week about the [value of structure](#) and why it goes wrong. As promised, continuing on the structure theme, this week follows with what to do about it.

Structure performs a unique role in organizations – it provides a framework in which we work together and, if you want to get it right, it starts with Strategy. Often this is where organizations get it wrong, and it is a result of language. If you ask two people what “Strategy” means, you will likely get two different definitions, if not more.

Strategy is about making a choice and a decision for your future. It is not about organizing. It is about deciding what type of organization you want to be. It is about the essence of the organization's direction of what it *will* be. Strategy is key because it defines what is important for the organization. These definitions become the criteria for selecting the best way to structure the business.

Some examples of strategy prompting questions are:

- What type of business are we?
- What drives our activity?
- What makes us unique?
- Who do we service, and why?
- What are our objectives?

As I said last week, unclear Strategy is often why our structure gets muddled.

So, once you have a clear articulation of the Strategy, then it is a matter of exploring four key elements of structure:

1. **How many levels should our structure be?** These are not arbitrary. Too many leads to bureaucracy, and too few means you aren't looking far enough out and your competition will surpass you.
2. **What are the key functions?** Which functions are key to delivering the Strategy? Good strategy work defines which is the preeminent function that all others are there to support. You will face competing demands and priorities if you don't make this hard choice.
3. **Who are the best to fill the roles?** A good structure defines the roles *without the people* and then finds the right people for the roles. If you do it the other way, your Strategy will be a victim of your structure.
4. **How will the roles inter-relate?** This is about defining the authority of the roles concerning one another to clarify who gets service, has a say in others' work, and can impact others' work. When overlooked, we leave it up to our people to resolve, and we set them up for mistrust and conflict.

I have simplified this but, as we see time and again, organizations become very arbitrary in their structures.

A well-defined structure goes beyond clean organizational charts. They tell you the reporting relationships, but not the intricacies of the interactions. They don't tell you how the work is to be assigned and done, accountabilities and authorities, resource utilizations and allocations, or processes.

Not only do companies become “arbitrary in their structures”, but, as we've seen, structure often gets complicated after mergers and acquisitions, where two organizational structures are appended together, without thoughtful integration, and then never revisited, clarified, or evolved once the M&A is completed and the new company's new/updated strategy is revealed.

It takes the right structure for a strategy to succeed, and a clear strategy to implement a strong and sustainable structure.

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Organizations need their managerial leaders to be architects for the success of their people by designing the structures to enable them to flourish.

Have a great weekend, and ponder if your work is structured how you need it to be so that you and others can flourish.



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## A Definition of Strategy

7 April, 2023

Last week I wrote about how [structure needs to come from Strategy](#) and, strangely enough, my week was all about discussions and ruminations on Strategy. I spoke with clients on the subject and wrote a whitepaper, so continuing it into "Managing the Maelstrom" is natural.

I spent energy this week trying to define "Strategy" because, as I found out, there are various models, and everyone seems to have a perspective. In fact, as I found, dictionary definitions don't help because they vacillate between Strategy as a plan of sorts and Strategy as choices. For human endeavours, it is important to utilize the description of decisions rather than plans because we need clarity about the nature of our endeavours.

So, I landed on this definition: **Strategy is the purposeful orientation of an organization toward success in a complex, competitive, challenging environment.**

*"Strategy distinguishes between the important and unimportant while defining an organization in relation to its environment. It is a high-level endeavour that inspires stakeholders and clarifies where employees need to arrange their efforts to fulfill their roles."*

Hopefully, you see the value of this definition because it is important for people to understand the vision and intention of the organization. This clarity enables us to use our full capability because we know "what" we are trying to achieve.

If you consider how much of our lives are work, we need to have this clarity. Otherwise, we may have wasted our efforts and, heaven forbid, our lives, on something of little value. Logically you will see that this is where the critical role of management comes into play to manage the process and to lead us in the endeavour. Suppose we don't have a common operating picture of what we are to be. In that case, we will find that our diverse individual senses of responsibility will lead us all in different directions of disunity.

It is the work of management to define and align the Strategy in a way that we understand and can imagine the expectation of the organization's intent. When management doesn't do this, they abrogate their fundamental function.

As you have seen, I am an ardent advocate of human flourishing, and I argue that we don't enable people to flourish if we hold back this connection. I say this because people really want to do a good job.

So as you consider this, ask yourself:

- Do I really understand our Strategy?
- Do I understand my role in the Strategy?
- Do I clearly show my people their role in the Strategy?
- Have I taken it apart and made it real to them, or is it just words on a wall?
- Have we aligned all our efforts behind the Strategy?
- How well have I planned its achievement?

So this week, ponder on the nature of Strategy and the nature of *your* Strategy. Realize there is a fundamental linkage to engagement here. If I understand the Strategy and my role, I am likely to use my discretionary efforts in its achievement and, when I do that, I truly value my work and get satisfaction from it.

But the devil here is that all this can be undone without great managerial leadership. The starter is a clear strategy, and the force multiplier is good managerial leadership. With these two things, I can move the world and get true self-actualization from it.

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## Mental Wellness and Leadership

14 April, 2023

The missive before a long weekend is a tricky one. I imagine most are already well into long weekend mode, as I hope to be soon.

I had the opportunity this week to be a participant at the first-ever Province of Ontario First Responder Mental Health Conference. The event was sponsored by [Wounded Warriors Canada](#), of which I am Vice Chair, and brought together public safety personnel, academics, clinicians, and supporters from across the Province.

While mental health is a big issue in the lives of uniformed personnel, it isn't just in their purview. Mental well-being is a critical part of what I have referred to over the weeks as human flourishing. I was struck at the conference by leadership's critical role in mental wellness.

Of course, like the hammer only ever sees nails, I go to events and ponder the issues of [managerial leadership](#), so it is no surprise that this is my lens. Here are some of my reflections on mental wellness in our current world:

- **Mental well-being for self.** I have written extensively on Servant Leadership, and there is a tension between being focused on your team and caring for yourself. You need to balance this tension and manage it. If you do not care for yourself, you will eventually be unable to care for others. So, focus on the things that enhance your resiliency. While it impacts us mentally, stress can lead to real physical issues. The now overused analogy of putting your oxygen mask on first on an aircraft comes to mind.
- **Understanding of mental wellness for others.** The tossed-off comment "*I'm fine*" is far too many times a knee-jerk reaction. I believe that the key here is empathy – that ability to sense another human being's emotions. I think it also requires us to look at things through others' lenses –
  - What do you know about them?
  - What do you know about their circumstances?
  - What can you imagine they may be feeling?

Then go out and confirm what your mind has conjured up. Again, the key is empathy, a neutral sensing of how someone else feels. Human beings can be quite good at sensing. They just need to value it and practice it.

- **Taking action.** The sum of these two areas is to act upon these issues. Taking action on your own mental well-being fills us with energy and builds resilience. Being seen to take action on mental wellness by others fills them with hope.

Mental well-being is a very real issue and, if the first responder community can come to grips with it as an issue, so can we all. We need to end stoicism and stigma and take action for the betterment of all and for humanity to flourish. We need to dump the idea that health is just physical. They are intertwined and inseparable.

The first long weekend of the season is a good time to ponder your mental wellbeing and that of those around you. For it isn't just a work issue, it is a home issue. We have all come through a lot, and pondering the impact of the last three years is important.

Please also ponder the need for mental well-being in our first responder community. Every day they go out there to care for us and face things that few of us can even dream of. The Wounded Warriors Canada National Ambassador, [Romeo Dallaire](#), said it well at the conference. When he chose a career in the military, his father advised him that he was "*entering a business where he couldn't expect anyone to thank him.*" This is how our uniformed personnel go through their days, focusing on the public with little acknowledgement.

The importance of acknowledgement is essential for both First Responders and business employees. If we can't even recognize the importance of our "hero" workers, what do "regular" workers feel? When you identify and recognize the importance or quality of someone's efforts, that person subsequently feels seen, heard and

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understood. Validated and appreciated people bring more to the table and are more willing to speak their challenges – challenges that can then be addressed and made better. Without acknowledgement, these same people can feel disconnected and confused about their impact within the system which makes them draw back and become demotivated. Unacknowledged people can slip into apathy with then impacts the entire team or organization. Too often we focus on what was missed, instead of what was done. The adage, “*catch people doing something right*” comes to mind. Expressing gratitude is huge. Gratitude improves wellbeing, reduces stress, and builds resilience.

With the advent of the weekend, I wish you all the very best with your family if that is how you plan it, and I leave you with one quote from the session that resonated with me – “*Being unbreakable is not how you feel. It is who you are.*”

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## Returning to Office

21 April, 2023

In this week's longer missive I come back to a topic in the news recently – it is the **return to the office**. Strangely enough, it is still a topic, and became much more pointed when Elon Musk waded into the discussion last week by suggesting that working from home was morally wrong when service industry personnel must be at work.

Some companies still struggle to define their policy, while others have everyone back.

To be clear, I don't purport to have the answer. Frequently I get asked what others are doing, and I endeavour to explain. Our clients run the spectrum – some are fully back, others have ranging policies from two to three days in, and others couldn't bring everyone back even if they wanted to. And then there is the discrepancy between knowledge workers and frontline/service workers.

There are CEOs and C-suite executives who want people back. Then there are pundits on the other side arguing remote work is the brave new world of work, so get used to it. So, employers and employees have to delve deep and find out what is the root cause of their discontent or disquiet with either option. And then there is the tension of good for the business vs good for the people, which is clearly not always the same thing. Bosses and employees have different understandings of what the office is for, and after three years of working remotely, everyone has developed their own varied expectations about how best to spend their time.

As I have argued in prior missives, this is all a matter of risk and decision-making. The organization that mandates their people all back or to a level that is higher than now runs a risk of losing people. The employee who gives in to the need to be back in the office risks losing what they have become accustomed to. So, I thought this week I would offer some factors to consider for policy and yourself.

From the policy standpoint, consider these:

- **Strategy.** How does return to office reflect our Strategy; who do we want to be as an organization? This ties to not just objectives and goals but also our Purpose, Mission, and Values, most importantly. Our executives are the protectors of Strategy. Even if we really want people back in the office for control's sake, are we living the Strategy as intended? Are your employees clear on the strategy they support and how their choices might affect the ability to carry it out?
- **Talent Loss.** This is the argument made repeatedly; if you force people to return to the office, you will lose them. This is the risk issue. Employers are unwilling to enforce things, likely out of fear of alienating a workforce where it's already hard to recruit and retain, and don't want to be the "bad guy", but they have a business to run. What is the likelihood and probability that this will happen, and what will we do to mitigate these concerns?

From a personal standpoint, consider this:

- **Needs and Wants.** What do you need? Is it essential you work from home, or is it a desire? We have become accustomed to working from home, so we must explore what is important to us properly. Our world has not become any simpler over these last few years, and returning to office has become an emotional issue. It requires clear thinking on what we must have and just how important it is to have flexibility.

I can't say enough that the key is for employees to consider what is really important in our lives. At the same time, there must be a dialogue in the organization. I sense that the conversation has stopped and become entrenched. Can the corporation oblige those that need reasonable accommodation? Is communication clear?

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The executive needs to know the organization's pulse, which should come from management. Sure, Executives can have focus groups and ask various people, but the key is the individual managers who, in turn, may be struggling themselves, but they need to be part of the dialogue with the employees.

The one point I will make, though is that we need a decision for everyone. The longer this rolls around, the more the environment leads to unease, discomfort, and uncertainty. The world has enough of these three things already, so I suggest that decisions must be made for everyone, instead of kicking the can down the road. So, it comes down to a business “bite the bullet” decision. But it has to be a flexible bullet, that is willing to evolve if it absolutely doesn't land. It requires strategic vision to navigate the changed power dynamic, where employees have more negotiating power.

As you go into the weekend though, stop and ponder what you need and want and explore the issue of returning to the office. Reflecting on this is important and timely, whether for yourself or the business.

Steadfast, Vigilant, Adaptive and Optimistic.

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## Employee Care

28 April, 2023

I had the opportunity this week to be part of a discussion on **employee care**. It was part of the [Flourishing at Work](#) project, which has been the topic of many of these missives. I want to thank Marie Gill from [Florens](#), who introduced us to Metlife's work to quantify the value of caring for employees to create successful organizations.

As I have said before, our mission at Forrest & Company is to help create Great Places to Work that achieve the organization's Strategy. We intend to bring the two sides of the task and the people together, and Metlife has done the work to demonstrate real value in caring for your people. As the Employee Care Architect for Metlife, Matt Gill from the UK stated that they can validate that organizations that care for their people will do better than those that don't.

The approach needs to be holistic for true care to be demonstrated. Metlife has identified that the elements for employee care are:

1. **Effective pay/compensation.** These are the table stakes; they meet the intrinsic needs of employees
2. **Purposeful work.** This is understanding work and how it links to the Strategy. It is how employees add value
3. **Social and Supporting Culture.** As we say, it is the right of every employee to be safe, physically, psychologically, socially
4. **Flexibility in work-life balance.** This is key to what I talked about last week on return to the office; can employees be accommodated in the ways how they work
5. **Professional growth and training.** This is where the manager is growing and developing employees rather than either leaving them stagnant or leaving it up to them to sort out
6. **Wellness programs and benefits.** For people to flourish at work, we need to care not just for their physical health but their mental health

These deliver care across the employee experience. These are interrelated and, while many look at the macro level as HR programs and policies, I see them differently, because the real care comes from the micro level. As an employee, I get the most value in my relationship with my manager at the micro level. My manager provides me with the recognition that is important for me to flourish. After all, most people want to do a good job and feel pride of effort. As Dr Karen Doll points out in her research, too often, leaders overestimate what encouragement they give their employees and, at the same time, employees underestimate the encouragement they are getting from their boss.

To change this, as I have argued in [my book](#), means that our managerial leaders have to be professional managerial leaders first. They need to set aside their technocratic skills as accountants, marketing professionals, or systems architects and need to be focused on their people. If we cascade this down through the organization, we can create a caring environment for all.

But what of the managers themselves? They are proving to be the most stressed of all employees in organizations. Where is their care? It comes in turn from *their* managers. So, we need to make this a serious effort cascaded throughout organizations and provide care for all. Our managers need to be cared for by their managers and, simultaneously, held accountable by those managers to care for their people. We cannot assume that our managers will feel responsible for their people; they need to be held to account for it. It is the inalienable right of every employee to be safe physically, psychologically and socially, so it is the work of individual managers to ensure that safety. No policy will assure it; it is only through the efforts of management that we can do it.

Whether it is for the employee or the manager, we need to practice the golden rule of leadership "*Know Your People and Promote their Welfare*". As Metlife has attested, you can create successful organizations by doing this. If we fail to do so, we don't create great places to work, and we do not achieve our Strategy.

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Have a great summer weekend.

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## Role Clarity and Flourishing

5 May, 2023

Continuing last week's theme of Flourishing at Work, I want to discuss a key contributor to flourishing: role clarity. This emerged as a hot topic this week, with multiple clients over the last seven days.

When we think of flourishing, we often default to the HR programs to help people at work, but more rarely consider the importance of clarity.

Most employees go to work with a desire to do their best. They are often personally invested in success at work and want to finish the day feeling they have accomplished something tangible.

The employees are driven internally to do their very best for the organization. This personal commitment leads them to work extra hard for their passion based on their commitment to the cause. When there are structural changes or structural issues, there are problems with role clarity.

The hallmarks of the lack of role clarity are:

- The organization develops silos and ultimately
- There are endless meetings
- Employees are unsure of who to go to get help
- Work is duplicated
- Employees are unclear on who has decision authority on issues
- People are crossing over and questioning the work of others
- Decisions are not made
- Goals and objectives are missed
- The Strategy falters

When people are unclear on their roles and the interrelationships of their roles with one another, it leads to consternation. In turn, consternation leads to:

- Disenchantment
- Confusion
- Feelings of being overwhelmed
- Feelings of disengagement
- Feelings of frustration
- Issues of mistrust among peers
- Acrimony among team members

This consternation is the opposite of flourishing. When good people who mean well have these feelings, it is disruptive. People feel they have lost control and can't do their best work, and they either leave the organization or try to make the best of a bad lot. In other cases, they stay, disrupt the organization, and poison the environment.

The foundation of role clarity is accountability. As you know, our work is about creating Accountability Management systems for our clients to create great workplaces to achieve the corporate Strategy. Without accountability, organizations rely solely on responsibility and a personal feeling of obligation, and when they only rely on that, they become a hotbed of consternation, as seen above.



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The Accountability Management System (AMS) provides clarity for employees. It defines for employees what employees are expected to deliver and what authority they need to get it done. This is not about how they are to produce work, but instead, it provides them with clarity on the end state of their work and enables them to use their skills, knowledge, judgement, and discretion to determine how to complete their goals.

Doing this empowers them to do their work, but it continues beyond there. It defines:

- The purpose of their Roles in relation to the Strategy
- The key leadership Accountabilities
- The task Accountabilities of their Role
- The resources they have to complete their work which includes
- The Authority the Role has over other Roles

Authority commensurate with their accountabilities is key to empowerment. It provides guidelines and clarity, but more importantly, it defines the nature of their control over their work. Control is essential for people to flourish in their work, enabling them to manoeuvre to achieve the outcomes they need to feel whole.

If you want your people to flourish and at the same time achieve the Strategy of the organization, then you need to take the time to set up role clarity. Setting role clarity is core to managing effectively. Too often, this is left to happenstance.

So, consider the adage "*an ounce of prevention is worth a pound of cure*". As so many of our clients have realized, it is worth the time spent on prevention through role clarity to achieve the organization's goals and thereby create great workplace places.

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## Toxic Workplaces

12 May, 2023

I saw an interesting discussion on Twitter this week, which led me to a topic I have not addressed in the past: **toxic workplaces**.

The discussion was based on a video which showed a Foot Guards musician who collapsed while playing in the rehearsal for the King's birthday parade at Horse Guards in London. Temperatures had soared in London, and the band person collapsed from the heat. As they struggled to get up and continue playing, emergency medics scrambled to assist the soldier.

Having paraded on Horse Guards myself, in 25+ degree weather, in a uniform best suited for a cold day in the Highlands of Scotland, I had both empathy and sympathy for the soldier. What caught my attention was a psychologist claiming that this showed a toxic work environment.

It got me thinking, however, do we really understand the nature of toxic work environments? I believe the issue is that a toxic work environment is not actually a cultural issue, but one whose roots lie in poor managerial leadership.

In far too many cases, we overlook the real cause of toxic work environments, which is bad management. Toxic workplaces are created when we allow leaders to:

- Abuse employees (either directly or via neglect)
- Not care for employees' health and well-being
- Set unattainable goals
- Humiliate and degrade employees
- Destroy employees' self-esteem

Far too often, we turn a blind eye to the successful leader who achieves quantitative goals but leaves a trail of destruction in their path. This happens when we place a higher premium on results and not on the effectiveness of how we achieve them.

There are too many cases of sociopaths who climb the corporate ladder with no internal moral compass of guilt, but deliver an outcome that hits our "ideal" end state. In her seminal book, *The Sociopath Next Door*, Martha Stout argues that 1 in 25 people are sociopaths. That is a high number, and organizations have their fair share of these individuals.

In my career in consulting, and as a leader, I have come across far too many cases where leaders have created environments where the employees don't feel safe psychologically or socially. These sorts of work environments are the toxic workplaces.

In the case of the young soldier, they were trying their hardest in a harsh environment. The fact that there were medics there to care for them does not, to me, indicate a toxic workplace. Instead, it shows a soldier with a high sense of responsibility, pushing himself to continue to perform despite adverse conditions.

So, I ask you to think hard about your organization. Are your leaders caring for their people as true servant leaders, or are they too busy trying to look good at their employees' expense?

There is a great video of the Commander of the Australian Army addressing the issue of workplace harassment, using a phrase that is very apt for this situation: "*the standard that you walk past (and do nothing about) is the standard that you accept.*" In other words, when we turn a blind eye to our leaders' abuse of authority, it is actually on us, the leaders.

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In my drive to help organizations where their employees flourish, I feel it is incumbent upon me to raise this point. If you don't address it soon, it can get out of control, so we must all be vigilant to ensure our leaders treat their employees with the respect they deserve. To use another adage, treat people the way you would want to be treated yourself.

We are accountable for the output and working behaviours of our Direct Reports. From that, it is the role of the managers of managers to ensure our leaders behave in a manner that we would expect for ourselves and to deal with issues in a timely manner.

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## Charlatan Expertise

19 May, 2023

This week is about **charlatan expertise**. It's a phrase I coined watching the pundits on TV explain their knowledge in submersible vessels, Ukrainian military operations, or the never-ending parade of medical experts brought out to cover the latest illness or potential pandemic.

Where does this thirst for expert advice come from?

In previous missives, I have written about risk and how "unexplored risk becomes fear". Our drive to find the experts and risk seem inextricably linked. Back in the early days of COVID, we all hung on to the specialists who expressed their opinions on what to do. The media, of course, fed on this insatiable public desire to hear from those with the expertise. But I couldn't help but feel that the real experts on pandemics were those who had lived through Spanish Flu over 100 years ago. What we were getting as expertise was extrapolation to form judgements and, therefore, opinions.

So, why might this be problematic?

There is a cottage industry in business these days around experts who provide their opinions to clients couched in knowledge. Whether it is market predictions or strategy insight, it is a matter of judgements and opinions. In our line of work, we face other consulting houses that gather data on other companies to provide benchmarks to share with clients what others are doing. This fills the need to reduce risk by suggesting that the "good companies" do this or that, and that assuages the client's fear that they may not be on the right track. They compare your organization to a company, team, or leader not in your line of work, with your diverse team members, or your life experiences. These are all illogical comparisons because, deep down, we are all different, sharing similar challenges. The key is that what may work for one will not work for the other.

Take for example, Toyota's manufacturing process (Lean) created in Japan with a very different culture than North America. Because it was successful in an automobile manufacturer in a hierarchical culture, we assume we can transplant it into managing a string of hotels because the pundits say it. Sure, some things will transfer, but these processes get rejected over time because they are not of the body. Once again, we see the case where we copy what was supposed to be tried and true to reduce risk.

While lots can be learned from others, the key is it must come from inside us. As we say to our clients, you know your business best; what is best is common sense to you and your people. It isn't about following what others have done in a fad-like trance, but about understanding who you are and what you need and want to be successful.

When asked this week what to do in a particular situation, I relied on what is key and foundational to every business: what is your Strategy? Strategy, as I have said before, is deciding what you want to be and then exploring the nature of your risks related to your Strategy. There is no shortcut here where the expert will solve it for you -- it comes down to your thinking. Exploring risk is about thinking through the risk and not relying on another to tell you what to do.

The charlatans will not go away, and the parade of experts will be there, but don't take the bait. Think it through for yourself. Trust yourself to know your business or world but be clear on where you are targeting. That will help you find your way. Strategy, whether for business or personally, is key -- know what you want to be when you grow up, and you won't be fooled by the siren pundits out there who will inadvertently lure you onto the rocks.

Have a great first summer weekend and consider the value in passing this on to others so they are not lured onto those proverbial rocks of the quick fix.

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## A Canada Day Reflection

26 May, 2023

This week is all about Canada Day. My apologies to our clients from other countries, but I feel now is a time to be a bit parochial and talk about our Nation.

I'm old enough to remember Canada Day as Dominion Day and, I must admit, I have seen a lot of change over the years. In true Canadian style, it was often downplayed, but then, around the Vancouver Olympics in 2010, it seemed that Canadian self-perception changed. There was a renewed sense of nationalism, and we started to define ourselves as an entity rather than a "not." That "not" used to be "not American" and "not British." It felt like we were growing up and learning who we were as a truly multicultural mosaic.

In my last role, in my previous life in the Army, I used to love the chance to go to army graduation parades or inspections. It offered me the opportunity to congratulate the troops but, what was the real fun, was to be able to turn away from the soldiers and address the families, friends, and loved ones, and extoll the virtues of how they had supported these great Canadians in their roles as going beyond themselves to a greater calling for the Nation.

However, I have seen that we have got down on ourselves again in the last few years. It may have been for good reason as we, as a Nation, begin to reconcile ourselves with our Indigenous Peoples and that sordid past. But it has gotten worse. It may be the post-COVID malaise, but everyone has an axe to grind. If I was at a parade today, I might even be reluctant to extoll the virtues of National service because it seems we are getting down on ourselves.

So, this week, I wanted to say – can we get back to realizing that we live in a truly great nation? Can we make peace in all facets of our lives and realize that we are truly blessed to live in this country? If you look around the world, every Nation is struggling in some form, whether that be inflation, cost of living, care for our sick and infirm, and so on. This is also not to be Pollyanna about it. There are still problems like the fact that the wealth isn't shared evenly and communities still don't have potable water across the country.

There are a ton of articles out there about how to celebrate Canada Day respectfully. I think people right now are torn between celebration and reflection. Everyone will have different reasons for celebrating, or not celebrating, as they see fit. For me, personally, I think we can celebrate while understanding we are not perfect. Perhaps Canada Day is a day of education, and to recognize what you can do to improve. It's not specifically celebrating Canada, but celebrating belief in something larger than ourselves – in community, in common purpose. Everything is so divisive today, so having a day to celebrate coming together is special. I think it's an opportunity to consider what it means to be a Canadian. But there has to be sensitivity to those who don't choose to celebrate. It's a delicate balance.

I believe we live in a truly blessed nation with a tremendous amount going for it. We have a lot to offer this world and each other, and so this one day is the day to do just that.

If you ever want to understand what makes Canada truly great, I suggest you go to Normandy, France in June, or Holland in May and listen to how young and old truly remember and thank Canada for saving them from tyranny. They are very emotional events, and the French and Dutch will never forget us for that. It's a reminder that united Canadians can do great things.

So, I wish you and your family a terrific Canada Day, however you choose to commemorate it.

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## Fear in the Workplace

2 June, 2023

This week is about fear in the workplace. When I first heard about it as an issue inside of a business, I thought it was a one-off situation. Over time, I have found that more and more clients have identified fear as a very real manifestation in their business. People are talking about it, and it shows up in employee surveys in many sectors.

I am not sure of the actual causes, but here is what I speculate may be the reasons for this growing fear in workplaces:

- The workplace is not immune to the outside world, and people are very fearful of the world's predicaments, which transfer to employers
- Similar to above, the media has hyped a recession and bad economic news daily, and there is a genuine concern for the state of a business
- In hybrid workplaces, there may be a fear of losing out being at home while others are at the office
- There is a genuine toxic culture at play in the workplace
- Similar to above, there is a culture where it is unsafe to speak up and be open
- It may not be a toxic workplace, but there is passive-aggressive behaviour by management which is creating unease and fear
- There may be changes occurring in the business, and employees may feel they cannot keep up and end up sidelined
- There are clear-cut cases where employees were fired and employees feel they may be next
- Employees may be unsure of where the organization is going and their role within the organization

If there is fear in the workplace, it is clear though, that organizations cannot just sit by and hope it gets better. Fear is an emotional state which, left unresolved, progresses to the physical realm in the form of stress, anxiety, burnout, disengagement, and lost effectiveness for the business.

In my experience, there is rarely only one cause for internal disruptions, so it may be a combination of a few. While the brainstormed list above is not exhaustive, you may have others I have not considered.

The one common denominator is the human beings in the workplace. The key thread in the list above is it is about management. By management, I refer to how the business or organization is led. Too often, we assume that it is about the employees. The real issue is that this fear is a problem for management, and likely one root cause is the management of the business.

Organizations take the lead from their management. Management develops and, in turn, translates the Strategy into actionable work. Suppose the issues are the external world bleeding into the business. In that case, management's role is to help the employees through their hardships to get the necessary productivity and environment for people to flourish. Management does this by practicing what we call Enlightened Leadership. Enlightened Leadership is where managerial leaders practice authentic, servant, and transformational leadership.

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

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To deal with the fear in the workplace, management needs to focus on being servant to help their employees. Transformational leadership removes fear from the workplace. Finally, if our management is authentic and truly value their employees, then management reduces fear.

The golden rule of knowing your people and promoting their welfare is essential to overcoming fear. Yes, it will require focusing on the individual and will take time, but each step forward moves and changes a culture. I hope this helps define the critical role management plays with good managerial leadership.

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## 10 Abdications of Managers

15 July, 2023

This week is about the **Ten Abdications of a Manager**. From our work with thousands of clients over the past 35-plus years, we have identified a commonly exhibited pattern of negative managerial behaviour – managers renouncing or surrendering the best practices of their authority. This conceptual paper was originally drafted a number of years ago by Nick Forrest, the founder of Forrest & Company, but it is as valid now as it was then.

When you think of what I have written over the last few weeks – bad sociopathic managers, fear in the workplace, and even return to office – the common denominator is management. The abdications are the seedlings of bad management and, left to grow as a weed, they can soon choke out the garden of a great place to work.

These abdications are symptomatic of a Manager unwilling or unable to understand the foundation of effective managerial leadership. *“Managers are accountable for the output of their Direct Reports”* is a powerful statement. It contains the strict logic that Managers must use all available means to ensure the quality of their team’s output. It is by doing so that they add value to their team. Managers indifferent to, or outright ignoring, this accountability do not, and perhaps cannot, add value.

What follows is our list of the top 10 abdications.

1. **The Manager does not set context for his team.** The manager does not inform his team of the broader context of the team’s work – the organization’s strategy – nor the team’s place in it.
2. **The Manager does not plan the work of her team within the context of strategy.** The manager fails to organize the work of the team internally, align it vertically, or integrate it laterally across the organization.
3. **The Manager does not unify his team.** The Manager does not provide clarity, energize the team, or manage conflict.
4. **The Manager neither effectively integrates, nor dis-integrates her team.** The Manager hires haphazardly, often without clarity from her own Manager. Once hired, she does not effectively “on-board” the new team member to the team and vice versa. Inversely, dismissal is arbitrary and is often a symptom of her inability to manage effectively.
5. **The Manager neither fosters nor captures improvements.** The Manager allows products and policies to stagnate and continuous improvement is ignored.
6. **The Manager does not effectively delegate work.** The Manager does not clearly and consistently direct employees.
7. **The Manager does not monitor the activity of her Direct Reports with the appropriate level of attention.** Managers fire and forget, the delegate but don’t follow up.
8. **The Manager does not coach his Direct Reports.** The Manager’s Direct Reports never know whether or not they are doing their work well. Further, he is not available for direction, instruction or problem-solving assistance. He avoids having uncomfortable corrective conversations.
9. **The Manager does not adequately assess the effectiveness of her Direct Reports.** The Manager avoids ongoing assessments, rather, she reserves them for, at best, an annual review. In addition, she assesses based solely on results and not on effectiveness within the constraints of the environment.



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10. **The Manager who manages other Managers does not hold his Direct Reports accountable for providing good leadership to their teams.** This is the greatest abdication and the root of all the others. The manager of the manager does not hold that manager to account for being a good manager.

All of these abdications are solvable; it just takes time, effort, and discipline. Resolution starts by making sure your managers of managers are holding their managers to account to do # 1-9 above.

This weekend, consider how you and your managers are doing with these abdications and think about what must be done to begin addressing them. Reach out if you're not sure of the right path.

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## Front-Line Leadership

22 July, 2023

This week I am tackling the issue of **front-line leadership**. Last week I wrote about the [Abdications of Management](#). I finished with the #10 issue – the biggest – that managers of managers are not holding their managers accountable for practicing good management. In our experience, organizations fret over the quality of their front-line managers. Far too many times, we hear senior management say, “*Fix those guys down there. That’s where our problems are.*” In some cases, this is often true.

But, first, a definition of front-line leadership: this refers to the first level of managers and, in those situations particularly in manufacturing or industry where there are large numbers of front-line employees or 24-hour shifts, supervisors and lead hands.

Organizations spend inordinate amounts of money and time on programs designed to teach the techniques they feel are missing in their management. Some of these are:

- Coaching
- Handling difficult conversations
- Progressive discipline
- Time management
- Team building, and so on.

In other cases, progressive programs teach how to be visionary, affiliative, democratic, and the like. All of these skills are valuable but, what they often miss is, in their desire to teach **how** they miss the **what**. There is no doubt that new managers need to develop skills as they shift from being good technocrats to being managerial leaders. However, the **what** is overlooked. It may look like an exercise in semantics, but it has a real impact. It describes what has changed from being an individual contributor to being a managerial leader. The **what** is the accountability of managerial leaders and the authority they need to have to fulfill their accountabilities.

As managers, they are accountable to *their* manager:

- For the output of their direct reports
- For the working behaviours of their direct reports
- To build a team of increasingly capable direct reports
- To lead their team in the accomplishment of goals
- To practice continuous improvement in their work

To do these, they need to have the authority to:

- Assign tasks to their direct reports
- Determine the appraisal of their direct reports
- Determine who is on the team
- Initiate the removal of team members

Too often, we see that managers are unclear on the accountability context in which their skills above are to be employed, and they are unclear on their role. The authorities, in turn, get watered down and even trodden upon by higher-level managers or the likes of Human Resources because we feel we cannot trust them.

I am not arguing that skill development is not important. I argue that we should spend more time clarifying management's expectations. Without clarity of expectation, it is hard for them to be truly effective.

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The issue here then also falls onto the shoulders of the managers of the front line. They are not clarifying the expectations of what their leaders are to do. Instead, they are more than willing to send them off for training and hope to get that perfect manager back – one who engages with their sense of responsibility to do what is right so that the managers of managers don't have to engage in the development of their own people.

Finally, a point on the supervisor–manager relationship, in our experience, there is also a lack of clarity for supervisors / lead hands. Too often, the supervisors / lead hands are unclear on what they are accountable for and their authority.

I am writing to allow you to pause and consider if our front-line managers and supervisors are clear on what they are accountable for. Consider this the next time you hear the cry "*We need to fix things down there!*". And remember whose problem is; it is the management of those levels or the managers above them.

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## Working Through Change

28 July, 2023

This week is all about change. Change is everywhere around us. We experience it every day, and we adapt to those changes. If ever you were in doubt, look at the changes meted out by COVID. We had to adapt quickly.

There are two types of change – change thrust upon us, and change that we manifest.

In the case of change thrust upon us, we have to adapt and, as we say, when those things happen, we live through the “ABRUPT” Forrest stages of change:

- Avoidance
- Betrayal
- Resistance
- Uncertainty
- Practice and
- Taking it on

Think back to a situation – COVID or something even less impactful – did you find yourself ramping up and down the stages of change? Most likely, you did. At the foundation of the impact of change is that we can no longer lean on our old ways – we suffer from [Anaklesis](#), which I have written about in previous missives. Our need to lean on the things that provide us comfort is strong, and those living in the Avoidance, Betrayal and Resistance realms aren’t so much anti-change as they are trying to get back to an equilibrium.

So, why the dissertation on change? It is because, as leaders, our job is to bring about change. Remember the adage, “if you don’t change, you die.” Again, leaders are the ones who bring about change. I believe this strongly and, as in [previous missives](#), have spoken about the critical role an enlightened leader provides by being transformational, taking people from a current state to a future, more desirable end state.

The issue for leaders is that they must drive the change. They need to lead the people beyond their analysis and through the stages of change. Too often, we see leaders who assume that people will do it once they articulate the change. The issue is that too many forces are working against the change and that the employees need to be led.

The worst offenders of assuming people will follow the change are CEOs. They are the ones, in most cases, who initiate the change but don’t necessarily follow it through to its completion. This is likely less about attention span and more about miscalculating how long entrenching change really takes, or an assumption that everyone can see what the CEO sees and both understands the need for, and benefits from, a change. The same is true for anyone who initiates change – their job is to lead and implement change, and they have to stick with it. As John P. Kotter said, one of the causes of change failure is declaring success too early. It is all about stick-to-it-iveness.

But the issue also is the natural reaction to change, so management needs to be in alignment. Everyone who has change imposed on them deals with Anaklesis and the stages of change, including management. So, just as leaders lead the change, they have to do so for their leaders. They need to be on board for it to work.

As a leader, we need to catch ourselves and understand where we are in the stages of change and then help our leaders to deal with their own responses.

Successful change is never guaranteed, and it takes leadership and process to implement it, but with determination and good leadership, you can get there.

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I hope this helps provide insight into the nature of change and, most importantly, the critical role leaders play, and, importantly the CEO plays, in bringing about impactful and lasting change. They must model it and drive it and not let up.

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

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## Performance and QQTR

4 August, 2023

This week is about performance and performance management. The issue has come up a lot lately as organizations struggle to get the performance they want and, more importantly, need. I have lumped the two terms together because they are inextricably linked. You cannot get the performance you need and want without performance management. Ignoring this is akin to relying solely on responsibility (employees' subjective feeling of obligation to do something) rather than accountability.

Accountability is the nature of the manager-direct report relationship. It is about defining the work and the specifics of a task. Once the task is defined, the following need to occur:

1. Monitoring of the task or work to its completion
2. Coaching to adjust performance to ensure completion the way you want it completed
3. Assessing effectiveness all the way to assessing how well the employee is completing the work

These three steps are the essence of performance management, with one key addition of defining the expectation.

Whether you use the terms “goal setting”, “task assignment”, “setting objectives” or “defining KPIs”, they are all the same thing, and all revolve around setting the standard of expectation of what is to be delivered. At Forrest, we advocate doing this – you need to define the **QQTR**:

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

Two points here: this needs to be done in Dialogue – meaning the person has to agree that they can and will deliver to the QQTR – and must be within the individual's capability to complete it.

QQTR needs to be more, though. You need to ensure that they understand the Context of the work. Only you can define the Context and the work. They also need to understand the priorities, and you must make sure these are clear too. Not everything can be the #1 priority, so your planning will be important to be clear on what your priorities are.

So, the stage is set for performance with the pieces required for performance management. Why, then, do we not get the performance? Seven times out of ten, the steps above are not followed. The remaining 30% are because they are not done well. Here are some typical examples of where it goes wrong:

- We have not adhered to QQTR; instead using an obscure mnemonic like SMART to try to describe what is required in the task or goal
- We have not planned the work well, we have assigned it to the wrong person, or overloaded our employees
- The employees have not agreed to the task as assigned and not advised if they are overloaded
- We fire and forget the task; we don't monitor and coach along the way
- Circumstances have changed sufficiently to make the original QQTR unobtainable and, because we are not monitoring, we have no idea, and our people fail to tell us in time to be able to adjust the QQTR
- We focus solely on the output of QQTR that we have failed to assess their effectiveness in doing it, and they have either not done it well or disrupted the organization in doing it, thereby creating resentment in the organization

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- We have not clarified the “why” as the Context, so they are unable to plan how they will deliver the QQTR fully
  - We don’t spend the time and assess the risk carefully of which tasks are priorities. Without thinking about the risk, we open ourselves up to fear either in ourselves or our people, and fear stymies action

The great elixir of performance is communication. Communication is the only way two or more brains can work toward mutual aims, so you must get good at it. If your people are afraid to bring you issues, things will fall apart. So, instill a culture of Best Advice and demand that you receive it. Only this way can you overcome that fear. Spend time sharing and, even more importantly, listening – not just listening to the words but hearing the feelings.

Performance Management is not an HR system. It is how you get what the organization needs and wants. As a good managerial leader, you should delegate as much as possible. As a rule, we say delegate anything that you can. This way, you can help your people to grow.

As you can see, ensuring performance is a lot of work, but it is your work. If you want the prize of performance, you have to put in the time of preparation and follow-up.

I haven’t covered it all, and I look to you for your insights as well. It is a good use of your time to reflect on these things, and having the courage to change, will save you in the long run.

Have a great long weekend.

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## Focus on the Customer

11 August, 2023

This week is all about the **Customer**, but with a different approach from how we typically think. In our research on organizational pain, it has always been interesting to listen to what middle and senior management see as the pain for the organization. I have always thought it funny that they rarely discuss the Customer (the intended output recipient); only when we talk with CEOs do we find any consistent concern for the Customer.

This week it came into focus for me when discussing the structure of a huge multi-national corporation. The system was designed to support the business and to be all about where they could retain expertise, and was inevitably based on the incumbency and skills of the leadership.

So, to take this apart, there is a real danger, particularly for large companies, to build around expertise. While it is tangible and we can see it, it makes it hard for us to adapt to changing circumstances and our ever-evolving world. As I argued before, if we relied solely on experience we would never have gotten through the pandemic because no one had the experience. In the future, we need to focus on the ability to think through problems, not resting on how we did it before.

As for structuring around legacy incumbency, it, too, suffers from the same problem. It relies too heavily on experience and is not necessarily based on the Strategy. [Structure needs to come from Strategy](#), not the other way around. We again put too much emphasis on experience and need more focus on thinking about the end-state.

Now the real problem is that organizations that lose sight of the Customer become too involved in their internal affairs. As a result, they have built ivory towers that do nothing for the intended receiver of the goods or services. Instead, it becomes myopic infighting that leads to:

- Internal competition
- Lack of trust
- Squabbles over resources

In the end, we don't achieve our goals and, at the same time, cost the organization money and time. Meanwhile, the Customer is left unsupported.

The answer to this issue comes back to Strategy – which is clearly identifying the spine of the organization. The spine defines what is core to delivering goods or services to the Customer. It is what makes the business work. The spine can change over time as the Strategy changes: e.g the spine can be Marketing but evolve to Supply Chain as the organization develops to meet needs.

It is crucial to align the organization to the spine. In so doing, you are drawing a line in the sand and saying that this function is key to the success of our business, and the others are there in support, and must be aligned by the executive to make it work.

A final point on this is that it is all about continuous improvement. We always need to go back to check to see that our structures and, therefore, our people, are aligned to the common good of the



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organization. It is healthy to check every now and again. Organizations are like hoarders in that they compile work and structures. Every now and again, you need to clean them out to be efficient, effective, trusting, and adaptable.

Have a great weekend.

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## The Purpose of “Purpose”

18 August, 2023

This week is a change from the last few weeks and is about **Purpose**. I turn to this topic as it has become a key ingredient at Forrest & Company in the discussion of Strategy.

Traditionally, the articulation of Strategy included the standard Vision, Mission, Values, Objectives, Lines of Operation, and the Unique Sustainable Competitive Advantage. But, over time, it has become clear that an organization must truly understand and embrace its Purpose.

Purpose is all about the existential nature of an organization. It is linked to the Unique Sustainable Competitive Advantage, but goes further because it defines the organization's heart and soul for employees. The Purpose statement is to declare the intention of the business. It describes why the organization exists and is linked with the Vision and Mission. This is sometimes a subset of the Mission statement.

How they all fit together is that:

- A Vision is a future statement that describes an aspirational state for the organization. It focuses on tomorrow and what we want to become. It is to point the way and inspire. It is a subjective qualitative description.
- The Mission statement focuses on today and what we do. It is a concise statement of the type of business the organization is engaged in. It can include aspiration to describe both how and why.

The Purpose goes a bit higher and answers these questions for the organization:

- What is the higher calling of our business?
- Why do we exist in the world?
- What do we *not* want to be?

The Purpose is about creating meaning for the employees and positioning an organization to differentiate it. It is this higher calling that inspires employees. Employees tend not to be inspired by Purposes that relate to making money for the shareholders.

In this modern age, and coming out of COVID, people have a different sense of themselves and why they go to work or expend discretionary energies for a not-for-profit or for-profit organization. As I have related in previous missives, *"not everything in COVID changed, but everyone did"*. People have a sense of what is important in their lives, and they need to feel that what they are doing truly matters. The next generation of workers were looking for this meaning, even before COVID, and a solid purpose is a force multiplier to an organization in attracting and retaining talent.

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However, it isn't just organizations that need clarity of Purpose; we as individuals need to have a sense of Purpose in our lives. Viktor Frankl in *Man's Search for Meaning*, identified this over 78 years ago as he struggled to bring meaning to the lives lost in the Holocaust.

We often don't take the time to explore our Purpose and why we are here.

So, as you go into the weekend, ponder why your organization is here and, even more importantly, examine your Purpose. As Socrates said, "*The unexamined life, for a human, is not worth living*".

I leave it to you to consider. Have a great weekend.

Cheers,  
Julian

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## The Need for Feedback

25 August, 2023

Morning,

This week is about **Feedback**. Specifically, the absence of it.

Feedback is often talked about -- there are aphorisms like "*feedback is the breakfast of champions*," but, this week, I wanted to share a cautionary tale of when Feedback doesn't happen.

Feedback is work, and it takes energy and planning. It often gets pushed off in favour of short-term thinking and the urgent work of the moment. However, giving feedback is the work of managerial leaders, and is as important as Context Setting, Defining the Work, and getting the resources to support our people. Of all of those, Feedback takes the most energy, both intellectually and emotionally. So why is it important to do it? Let's use this week's example from a client.

This client had a senior executive who, throughout their career was successful, hitting sales targets and delivering for the business. However, in doing so, they "*left a trail of bodies in their wake*", as the saying goes. Employees fear them, and that fear has permeated and sullied the work environment.

How does this happen?

How are monsters born and bred? I believe it is when Feedback is not given to people early on and bad behaviour is left to incubate and fester. Constructive Feedback given in the early days could have corrected today's behaviour. Sins of the past are often brushed off with the excuse of "*that's how it was done back then*", and they are merely a product of that culture.

Well, if we argue that is the case, then yes, perhaps there is no way to change it, the past is the past. However, that doesn't answer the question of what of the Feedback *now*? Is it happening and are we taking it seriously? If you believe it is a function of culture, then ask yourself if our culture is any better now?

So, what should the culture be? The culture should focus on the common good and needs to be our anchor for making decisions, which require Feedback. We need to see it as our job as managerial leaders to help people adjust.

I have focussed this on Feedback for improvement. Just as importantly, Feedback for reinforcement needs to be done early as well. It is no good to say, "*don't worry, I'll tell you if things are going wrong*". When we do that, we abrogate our role as Managerial Leaders. We create fear and uncertainty if our

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people don't know how good they are. If we wait to tell them later, we will have created a sense of lack of confidence in our people, which will show up again later.

An analogy for Feedback is thinking of it as about orienteering. When you take your compass, shoot your bearing, and head off, the key is to adjust early because if you drift and don't change until you are at the end point you will have to exert more energy and effort to get back to where you want to be.

So, we need to adjust people early rather than trying to wait until they are an executive. It is about taking the time with them now and not pushing it off to a later date.

Your task this weekend is to do a stock-taking -- do my people know how good they are? Do my people know where their gaps are and what they need to do about it? What behaviour am I validating by not addressing it?

Take the time now to do this and you will help your future self not to have to turn around a stricken ship in the future.

As a notice, I am taking my own advice and taking next week off so don't expect a missive. We will pick up again after Labour Day.

Cheers,  
Julian

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# The Essence of Performance Management

8 September, 2023

Welcome to the New Year! I say this because of my childhood conditioning that, after Labour Day, a New Year starts and, even after all these decades, it still feels like September is a new beginning.

In this vein, I am writing about a topic that, while right now might not be the start of it, it is certainly on the minds of a number of our clients, and that is Performance Management. My intent for this week's missive is to do a high-level overview, and then, depending on the feedback, I will drill down into the various elements over the weeks to come.

So first, a little context and clarity: the essence of Performance Management is how we ensure that we deliver the organization's Strategy. By this definition, Performance Management comes *from* the Strategy, defines the expectation of what people will do to deliver the Strategy, and then how we manage that delivery. It is rooted in Accountability. By Accountability, I mean objective clarity on what people are to deliver and, at the base level, the fundamental component of the relationship between a manager and a direct report.

It seems important now because in this era of hybrid working and the great debate about productivity, it takes on a renewed importance. It hones and sharpens what people need to be productive at. With us unable to check in with employees in the workplace in the same way as pre-covid, it takes on even greater importance. It means we need to get smarter at defining work and monitoring how it is being done.

It doesn't stop at defining but requires that check-in to see that all is going well, that our employees either aren't overwhelmed or are suffering in silence, but rather flourishing in their work.

It also includes the elements of assessing how effective employees are working and then providing them with feedback on their efforts. Ultimately, it is about confirming that we are achieving what we need to implement the Strategy.

The elements of Performance Management are:

1. Clarity of Expectation – This stage is all about planning about the work and then assigning the tasks to employees for them to determine how they will deliver the results you need;
2. Leadership Action – This stage is about clarifying the expectations and dialoguing with the individual employees on their tasks. Once the task is set then it is monitoring their performance, coaching them. At this stage, the performance is underway; and,

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3. Assessment – This is now what most see performance management as. It is the ongoing dialogue over the extent of the task's lifecycle. It is about assessing their effectiveness in delivering the task. It includes the application of both positive and negative consequence in their delivery of the tasks.

A few notes here: performance management is how managerial leaders drive what is necessary for the Strategy. As such, the managerial leader defines the work and assesses the employee's ability and commitment to deliver the work. It is not about the employees defining the tasks. When this happens, it is an abrogation of managerial leadership. The employee's role is to determine the activities to deliver the task, and far too many “performance management systems” lose sight of this.

The final stage assessment also needs to be an ongoing thing. As I mentioned in the previous missive, this includes Feedback. It is not a once-a-year event, and any system needs to reflect this. No employee should ever be surprised by their performance at the end of the year because their managerial leader has been communicating, dialoguing, and assessing their effectiveness throughout.

There is a lot to performance management and it often gets short shrift. Hopefully, this week's missive has whet your appetite for further exploration in the weeks to come.

Have a great weekend.

Cheers,  
Julian

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## Performance Management Redux

15 September, 2023

Based on feedback, I am continuing last week's topic of Performance Management. In the weeks to come, I will drill down deeper, but this week, I wanted to reiterate a few aspects from last week.

I had questions about my comments about how employees should not define their tasks. This is core to accountability and lies in the difference between responsibility and accountability. We define responsibility as a personal feeling of obligation. In other words, responsibility comes from within us. In contrast, accountability is an objective relationship between a manager and a direct report.

When employees set their goals and define their work, they use their sense of responsibility. While this is valuable, it is more likely misbegotten. It is based on what they have always done, and that may or may not be valid anymore. Add to this that it may not link to the Strategy, therefore going in the wrong direction. The tasks must come from what someone is accountable for.

Performance management and role clarity are inextricably linked. Much of Forrest & Company's work is about the lack of clarity of roles, and we are brought in to help organizations flourish through the clarity of *who does what*. We find that, in organizations driven by responsibility, they often have insufficient role clarity, and everyone is doing what they think they need to based on what they have done in the past or their perception of the "right" work.

Employees setting their own goals merely reinforces their sense of responsibility. The problem, then, becomes how the manager gets them back on track. In an age when employees are feeling overwhelmed by the work in front of them, it is because their managers are not managing their workloads.

So, why do we often insist on employees setting their goals? Here are a few reasons we have found:

- Managers find it easier. It is so much easier to leave it to the employees to sort it out. As I said last week, this is where managers abrogate their accountability. It is their job to define the goals and then get feedback. A manager adds value by doing three things for their people:
  - They set context on the work by defining why and its relation to the Strategy
  - They define the goals / tasks / objectives
  - They are the ones who can get the employees the resources they need.
- There is a belief employees will be more engaged in the work when they define it. This is a prominent belief from the behaviouralist school of thought. While it may be true, because I do what I like and what interests me solely, it belies the nature of a manager and employee



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agreement. Unless I have the same view and perspective as my manager, how can I know what my goals should be?

The real culprit is that managers are not exercising their managerial leadership duties. If they are not, then the problem is theirs to a certain point, but it is their manager's problem because they are not holding them accountable to be good managers. In this way, it cascades up to the accountability of management.

The key to making this task / goal / objective setting work is planning. By planning, I mean thinking it through and integrating the work of all employees to deliver the Strategy. As I said last week, a key to performance management is the follow up once the plans are done and the tasks are set. That follow-up between manager and direct report is essential, but, equally essential is the manager follow-up with their managers to ensure the work is being done – the essence of accountability.

Have a great weekend in the last vestiges of summer.

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## Performance Management - Planning

22 September, 2023

This week, I am continuing my explorations of Performance Management. Last week, I reiterated that we mistakenly have employees establish their own goals. The problem is that this makes it very hard to manage performance, because managers don't define the work.

This week, I want to explore the real reason why managers don't set goals, which is all about Planning. Planning is essential to, and the starting point of, all performance management.

By planning, I mean starting with an objective and working backward to ascertain who needs to do what, by when, to achieve the goal.

By this definition, you can see why it is so important for the managerial leader to do the work because only they know what the end-state team goal is, and it is up to them to factor in the interrelationship of the work of their team to achieve the goal.

Planning is a core accountability and skill of the managerial leader. Here are some examples of what gets in the way of planning:

- Lack of clear objectives. Our boss hasn't planned, so we have no sense of what piece of their work we must deliver. This is why further down in the organization performance fails because we are not holding all management accountable for doing the necessary planning.
- The Tyranny of Do. Just do it. There is a perception that there is no value to planning. Action is all what we value here.
- Management not working at level. If we are a Vice President, for example, we might be doing Director or even Manager level work or, in some cases, doing EVP level work. We aren't doing the right work and that includes the right level of planning.
- We have no system or synchronized sequence of planning. We do budgeting, but we don't plan the work of human beings. We don't see planning as a system and one that needs to be choreographed for the organization.

Once the planning for performance management is validated, it is about getting on with the planning itself.

Key factors to consider in the planning for performance management include:

- The relative capability of your team members
- The broader context of the work

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- The purpose of the work
  - The standard of quality of the work
  - The quantification of what is required
  - What resources are available to support the team
  - How it fits with what other teams are completing
  - The circumstances that can impact the completion as planned
  - What contingencies need to be ready to deal with changing circumstances

The planning is, therefore, the key to performance management: without it – garbage in, garbage out – you get what you plan for and, without planning, you get nothing. As you can see, there is much to do here, but it is important to understand that this is the work of management to plan the work of those underneath us.

While planning takes time and effort, it is worth it. It is a matter of doing the upfront work to get the performance that you want and need. As they say, “an ounce of prevention is worth a pound of cure”.

As a final point on planning for performance management, the key prerequisite to success is role clarity. There needs to be a clear delineation of what your people are accountable for and, even more importantly, they need to know their authority in performing their work.

Have a great weekend.

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## Performance Management - Leadership

29 September, 2023

A shorter missive this week as we head into October.

Whereas the previous missives have been about the management side of getting performance management done, this week is all about the leadership side of Performance Management. While important, the management elements are only useful if the managerial leader exercises good leadership.

So, the leadership side begins after the manager has defined the task. Defining the task includes clarifying:

- The Context of the work - why it is important
- The Purpose of the work – how it fits with the Strategy
- The Quantity required
- The Quality standards
- The Time it needs to be completed by
- Any Resources that are available to help in the work

The leadership elements start because the manager has to discuss and negotiate with the employee whether they can complete the work to the number of items required, to the quality standard, in the time allotted, and with the resources available.

Once there is mutual agreement, it is a matter of the manager following up.

The manager follows up by exercising these three leadership practices:

1. **Monitoring.** This is the true art of following up. Time and again, leaders attest that this is the one major gap. They fire out the task, and they forget about it. Monitoring is about checking in. Managers use their judgement and discretion to ascertain the nature and frequency of the monitoring. They will monitor more closely if the employee is new to the task. If they have done the job before, the employee will resent the check-ins. The monitoring is to explore how effective they are on the path to the [Quality/Quantity/Task/Resources](#) (QQTR) and whether they are likely to achieve the QQTR output.
2. **Coaching.** This is the essence of leadership. Coaching is all about the conversations around the employee's performance. It is about reinforcing their success and re-calibrating when they need help. The trick to coaching is it needs to be timely. Don't wait too long, and don't shy away. Far too often, leaders shy away from coaching because they feel they don't have the skills. It is just a conversation, and it is more important to have the conversation than getting it perfect.

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3. Assessing Effectiveness. The whole point here is that, again, the leader uses their judgement and discretion to assess how well the employee has worked at delivering the QQTR. As I said two weeks ago, the manager owns the QQTR, so it is never a case of not achieving the QQTR; it is a matter of how well they performed it.

A final point on assessing effectiveness that I can't state enough in these ongoing missives is it isn't a once-a-year event, it is ongoing. The employee should never be unsure of how well they are doing. It can still be done at the end of the cycle but must also be continual throughout the year.

Too often, managers say they haven't the time to do this; they have more pressing work. I argue this is a main component of their work, and they better get good at it.

Have a great weekend, and perhaps, have a fresh start at accountability next week.

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# Truth

6 October, 2023

In [my book](#), I argue that words have a specific meaning and, all too often, there are different accepted meanings of a word. Two people often have two different definitions for the same word, creating confusion and issues. This week, I will tackle a term that has many meanings with little consistency and creates tension, arguments, and even fights - that word is Truth.

Recently, at Forrest, I had a conversation with the newest member of the Forrest team, Kimberly Thomas. The gist of the discussion was that we have moved away from facts to opinions, and it is happening at an alarming rate everywhere in our society. So, to examine the nature of truth we need to have clarity of what we mean.

For this clarity of definition, I think it is useful to go to the work of Jerry Rhodes and Effective Intelligence™. Jerry worked to define the Thinking-Intentions and Thinking Operations of human beings, and his clarity of language is a great place to start. The most relevant example of this is the conflation of Truth with Right.

**Right** is:

- A judgement
- An interpretation of facts
- An opinion or belief

**Truth** is:

- A fact
- A description of what is, or was
- A neutral statement that doesn't predicate value

By these definitions, you can see how the words have been conflated to mean the same thing. Prince Harry can talk about his "personal truth", or Stephen Colbert can joke about "truthiness", and both demonstrate that we live in an age where the lines of demarcation are lost. It helps to explain the era of "fake news", where the news "truth" is more often an opinion or editorial position.

Truth has been co-opted. Thanks to the proliferation of data and information, we twist truth to fit our narrative. It has been adopted for the use of those who place a real value on it. By value, I mean ascribing good or bad to it – it is no longer neutral. They use it to argue that their perspective is right because of the purity of truth. The problem is truth's weaponization.

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How did we get to this conflation?

I believe that the answer lies in the nature of our modern world. If it is true that human knowledge is doubling every twelve hours, then there is a proliferation of truths. Our technology enables us to hold in the palm of our hands information and facts that we could never have known a scarce year ago. What's more, in the competition for truth, we have become confused by the two definitions. One need look no further than Covid. At that time, our thirst for the truth led us to be confused and uncomfortable because there was no apparent or universally agreed-upon truth. Doctors had different recommendations. As a result, given a choice, we chose the truth that best fit our worldview or our judgement.

So, what are the implications?

Above all else, we need to be vigilant. We need to challenge where the truth really is. Is it an immutable fact or is it in the realm of a judgement? As an example, as we struggle to understand the nature of artificial intelligence and its applications, whether ChatGPT or something else, we must be vigilant. We need to ask for the facts and the reality of the situation. We must always ask; is that a truth or someone's opinion?

As leaders of our businesses, families, or society, we must be steadfast in our resolve to get to the truth and to challenge unthinking assumptions and opinions. We are in a crisis of true knowledge and truth and need to be vigilant.

Have a terrific long weekend, and a happy (Canadian) Thanksgiving for all that we have.

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## The Age of Scepticism

13 October, 2023

Last week, I wrote about the conflation of Truth and Right, and how we have lost a sense of truth in our rush to judgement. I did not know that we would see an example of the true tension between truth and right in hours after it was written.

We live in an age of scepticism. In its truest form, scepticism is doubting a knowledge, believing it tainted by belief or dogma. The issue with the current age of scepticism is that it has led to mistrust. Who can be trusted to give us a truth not infected by belief or dogma?

As I argued [last week](#), a lot of this results from the proliferation of information. It makes it truly hard to ascertain where the truth is. Over the last three years, I have found it hard to determine what news is true, and what is fake. Media has difficulty determining what is real as they rush to meet deadlines and compete with one another for the scoop. Media and social media are businesses; we need to see it that way and not expect them to be altruistic or unbiased.

At the same time, we live in the VUCA world. VUCA being a US Marine term for Volatile, Uncertain, Complex and Ambiguous. While coined almost 20 years ago, it is just as valid today if not more so.

Human nature, in the face of VUCA, naturally tries to simplify. Likely a result of our limbic system and evolution, our reaction is to simplify issues to handle them quickly. The real issue, however, is that when faced with an event or occurrence, there is rarely ever only one cause. It is essential to understand this when interpreting the cause-and-effect inter-relationship with events.

Too often, we simplify complex events to one “truth” which, in cause-and-effect terms, becomes whom or what to “blame”. The problem is that when we race to find the one cause or the focus of blame, we have not got the full picture and become prejudiced – we have pre-judged without the facts or the options.

As we see our VUCA world, it assails our senses, and our limbic system kicks in. So, as a result, we must keep our minds open, think through what we see or hear, and challenge what is before us.

What’s hard about scepticism is that it requires personal evolution. You can’t take a stance and hardline it forever because things are ever changing. You have to constantly seek out the new information and evidence as it arises, and be willing to adapt your thinking. Some people think this might make you seem



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waffling or indecisive but, in reality, it is a push to remain objective and current by ensuring you have all the relevant details to make your case.

Again, with the glut and overwhelm of information, parsing out the truth is increasingly difficult, especially when you can find myriad sources that support one stance, and an equal number that counter it. Critical analysis and wading through all the info to find “the truth” seems exhausting. Perhaps that’s where the “My Truth” concept I mentioned last week comes in. In an effort to find an answer or meaning, we go with the one that most closely matches our personal moral code, is easiest, and feels comfortable and, so, that becomes “my truth” which, eventually, with the support of media, becomes “the truth” for many people because it can be backed up by “sources”.

Or, conversely, we abdicate any truth and try to stay completely neutral (which is almost impossible), and which might be equally dangerous. (“You’re either with us, or against us”.)

Thinking this through is the only way to deal with VUCA and is necessary in all circumstances we face. We need to be sceptics; we need to challenge, and we need to think. The world needs thinking and rationality now more than affective reactions. In [previous missives](#), I have spoken of the need to assess risk in everything we do and it is very much the case in the age of VUCA. As you look at the world around you, take the time to think it through.

I hope that we can find our peace in this VUCA world and find it fast. Time and patience in all cases is running out.

Steadfast, Vigilant, and Optimistic.

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## Culture vs Strategy

20 October, 2023

A few weeks ago, I presented that we often have multiple meanings for the same word. This week I am returning to my old favourite: **Strategy**.

It is a term people love to use, whether it be strategy, Strategy, or Strategic. Even after trying to help people by providing a common definition, they still go back to what they lean on, and usually, that is whatever they believed before.

Nowhere is it more confused than when people refer to the phrase *“Culture eats Strategy for breakfast”*. People love to espouse this to define that the real key to organizational success is the culture, and that your culture will drive outcomes no matter how great your strategy is.

The problem is that we are using one definition for Strategy, which is not what strategy is. [My definition of Strategy](#) is: *“the articulation of the nature of what the business or organization intends to be”*. This is distinct from a plan. Yet most organizations only seem to see Strategy as a trumped-up plan. A plan is a roadmap of where an organization is and how it will reach its desired end state.

To clarify the difference, I am suggesting a Strategy is the WHAT and a plan is the HOW. The problem is we conflate and confuse these two by calling it Strategy when we mean the plan or the how. So, Peter Drucker really meant is that Culture eats your PLAN for breakfast.

If you think this is me just using semantics to split hairs, I disagree. I have spent far too much time with CEOs and Executive Suites believing they knew what they wanted to be because they said they had a strategy, only to find that they had a plan, albeit a strategic plan.

A phrase I often use is that we, as employees or members of any organization, whether for profit or not, exist to deliver the strategy. We are not really here to deliver just the plan but to ensure we achieve our future desired end state.

The problem is that executives, and often the Board, have misled their employees by not defining what they want to be. As an organization, we need to choose what we want to be to avoid confusion, dissension and, in some cases, mutiny. Without this clarity, employees are often left to define what they think the business is or should be themselves. This is where the mutiny comes in, and the “culture” can indeed end up sinking the business.

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Over the last few months, I have seen examples of organizations letting their culture overshadow and overtake their plan out of a lack of clarity. Once done, it is very hard to bring back.

Strategy defines:

- Vision
- Mission
- Purpose
- Values
- Strategic Drivers of the business
- The unique Sustainable Competitive Advantage
- Objectives
- Lines of Operation
- The organizational spine and structure

Without these clearly defined, you cannot get alignment, and you have missed the definition of end state essential to plan. From clear Strategy, you define the Strategic Plan, Operational, and Tactical plans.

The Strategy must also be discussed, revisited, and reinforced regularly. Most importantly, your managerial leaders must make it real and vibrant to their direct reports so they know how each contributes to the strategy.

So, ask yourself how clear you are, and how clear are your people? Can you all recite all nine elements of Strategy? If not, you have important work to do.

Some rainy day contemplation for you.

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## What Hinders Change

27 October, 2023

This week is all about **Change**. Far too frequently, we at Forrest & Company see change initiatives start and then stutter before full implementation. To begin, I want to focus on change management versus managing change.

To be clear, here is our distinction:

- **Managing change** is about *People* – managing the emotions, feelings, and attitudes as you lead people through change
- **Change Management** is a *Process* – it's about managing the planning, execution, and minutia of the change initiative

We see all sorts of change departments across various organizations and yet, still, the changes founder on the rocks of reality. So, why is this?

I argue that, if we use a change management team, we have outsourced our changes. Change management has to be done by management – it is the work of our managerial leaders to drive the change. The change has to be part of the fabric of the organization.

Managerial leaders are change agents. That is our work. Our job is to take our people, teams, and organizations from a current state to a future desired end state. This is the essence of change and growth. In the face of this, however, human nature is about returning to the old (comfortable) ways. Therefore, there is a tension between the future and current state. The reality is that tension seeks resolution, so do we get to the future state, go back to the old way, or somewhere in between?

In most initiatives we are involved with, organizations fall into the middle. They change somewhat, but they don't get to their desired state. In future missives, I will discuss the human nature aspect of change (aka managing change), but today is at the organizational level.

In his influential article *Leading Change: Why Transformation Efforts Fail*, John Kotter identified eight reasons why changes fail:

1. Not establishing a great enough sense of urgency
2. Not creating a powerful enough guiding coalition
3. Lacking a Vision
4. Under-communicating by a factor of ten
5. Not removing obstacles to the new vision

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6. Not systematically planning for and creating short term wins
  7. Declaring victory too soon
  8. Not anchoring change in the corporation's culture

At Forrest, we have seen all eight in action and as the major causes of the change initiative failure. However, I would add a few more. In many cases, there is often too much change occurring in the organization. We already know that employees' #1 pain point is feeling overloaded, so change initiatives, if we don't gate and control change at the top, just keep piling up. As well, there can be competing changes which dilute changes. This is why, when clarifying role accountabilities, we look to see who is accountable for the controls of change programs. This issue is big for large organizations where everyone tries to add value through their initiatives. If you want to test this, ask your front line about the changes they see coming down; they will no doubt give you insight into how much comes down the pipe to them.

However, the overarching cause is that management sees change management as something other than their work. It goes back to the lack of a professional managerial leadership cadre and ethos, as I have often argued in these [missives](#) and [my book](#). Get professional about change because it is your job and, of course, be disciplined in that exercise of the profession.

Wishing you a great weekend.

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## The Personal Side of Change

3 November, 2023

Following last week's discussion on [Change](#) and why it doesn't stick, I will move from the organizational challenges to the human aspect of why it doesn't.

At Forrest & Company, we have had extensive experience with change because, in all cases, we engage with our clients closely to help them move from a current state to a future desired end-state that helps create great workplaces.

So, to the **personal side of change**.

Like every human being, I have my own experiences with change. I have included endeavouring to change things for the better in my personal life. Yet, even when I logically know something is better for me, I still do the bad things. I am sure you can relate to having that piece of chocolate cake, or watching that movie instead of going to bed, or that other glass of wine as typical examples.

At Forrest, we talk about anaklesis as a form of resistance to change. Anaklesis is our need to lean on our old beliefs and experiences. It is our comfort zone. Change disrupts our old ways and creates tension between where we are and where we want to get. In an effort to escape that tension, it is a very natural condition for us to resist change.

So, if we can rationally see the need for change and yet don't gravitate towards it, what is going on? It is all about the nature of our desires and motivation. Motivation is the general desire or willingness of someone to do something. If we expect others to accept a change, they must be motivated to do so. Motivation is complex, just as we as human beings are complex -- no two employees think the same way.

If anaklesis is present, or the personal motivation isn't immediately there, how do you inspire someone to act in a way if they will not necessarily do it themselves?

The golden rule of leadership is to know your people and promote their welfare. This is key in the change; you must know their motivations and desires. Some ways to influence people towards a change are:

- Set clear context on why the change is important
- Show the value to them, in other words "what is in it for them"
- Link the change to making something better and improving conditions

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- Listen and respond with empathy to their words and, more importantly, feelings
  - Create a picture of the desired future state for all to see
  - Inspire others with your personal example
  - Keep talking, discussing, and, more importantly, listening
  - Most importantly, think through and plan the change and how others may respond to it

The people will determine if a change works or not, so you need to muster all the efforts of all your managers to exercise leadership and lead people through the change. It is no good to assume that they will accept the change just because of the pay cheque. They need the human touch. Managerial Leaders are the change agents of the organization, and they have to connect with their people thoroughly.

Change is closely linked to our current VUCA world. In this Volatile, Uncertain, Complex, and Ambiguous world we need managerial leaders who will plan and think through the change in detail, and those who practice the ABC<sup>2</sup>:

- Always Be Communicating
- Always Be Caring

Have a great weekend and enjoy an extra hour's sleep (except in those places that don't make the change.)

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## Remembrance Day, 2023

**10 November, 2023**

This week is my annual Remembrance Day missive, my third since I began the missive in 2020.

Remembrance Day and, with it, Remembrance Week, is an important and tough time for those who have served. Each of us has different reasons for its importance. We each have our protocols and rituals for what we think and do to reflect. It is a time to ponder those who served and paid the ultimate price, and to consider the nature of service before self.

Some will argue it is about focusing on those who left loved ones behind and never came home, believing in a cause greater than themselves. This is absolutely true but, for me, it goes beyond that. I learnt, in my 34 years in uniform, that there was another facet to remembrance: the impact on those who came home changed. During the Afghan war, Post-Traumatic Stress Disorder became a real issue, and we weren't ready for it. Sure, we saw PTSD before in peacekeeping operations and operations in general, but it was a hushed reality. It has been with us forever, hiding under different cloaks and names, and seen very differently than it is now.

But, it became bigger because some returned to their families, loved ones, and friends broken in both body and mind. The unseen PTSD came to the forefront. For the ones who had to be concerned for a loved one succumbing to their physical wounds, they had to deal with them succumbing to an unseen wound.

For me, this was the impetus to get involved in *Wounded Warriors Canada*, which was first established to provide support to those suffering from the unseen wounds of PTSD. So, in the early days, it was about the veteran. But then, the realization surfaced that the impact was not just upon them, but also their families. Within that are the seeds of generational impact. In the past, that impact for those returning from the Boer War, World War I, World War II, or Korea was, in a lot of cases, kept within the Legion Halls. The Legion Halls of today are a shadow of their former selves and hold nowhere near the same importance of post-1945.

Therefore, for us, the aim of *Wounded Warriors Canada* expanded beyond the veteran to the family, then to proper clinical care for veterans and their families, and has now grown to first responders and their families who daily face the same challenges of PTSD.



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My point here is to suggest that the need is there to support all those who believe in the greater good and who are there for all of us. They race towards the threat where others step away, and we need to care for them.

Our world has become less safe. I hope I am wrong and we will not need the likes of the greatest generation, but I can't be naive. We will always need those willing to run toward the challenges for the greater good. We need to be able to recognize them and support them and, at least, pause for the two minutes of silence in our busy lives and think about them all.

I often get asked what one should do at this time of year. My suggestion is to just take some time to reflect, whatever that looks like to you. Recognize that the true heroes will shy away from the limelight. Wear a poppy. It is one symbol of the whole year that connects us. It reminds us of the horrors of conflict but comforts those who serve that their sacrifices for us will not be forgotten.

Finally, the way to make this work is to educate the youth. They will have to carry the torch when we are gone. Don't leave it to teachers who have the constraints of lesson plans, but make it real to the youth and our future.

At the going down of the sun, and in the morning, we will remember them.

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## The Frustration of Meetings

17 November, 2023

This week is all about the bane of everyone's existence – **meetings**. Universally, the topics of meetings comes up with all of our clients, and, whenever we work with client teams, there is inevitably a discussion about the meetings in their organizations.

Some of the discussions we hear are:

- *“There are too many meetings”*
- *“We are unsure of the purpose of the meeting”*
- *“There are too many people in the meetings”*
- *“There is no action coming out of the meetings”*

Meetings grow exponentially. They are a variation of Parkinson's Law, where work expands to fill the time available. Meetings do the same. Leaders continually complain they have no time, and meetings are the big culprit.

It feels like organizations have lost the art of meetings. It got worse during Covid when everyone was at home and online meetings became the norm because they were the only way to connect. But the rot set in long before Covid. It manifests my argument that it represents a lack of a professional managerial corps. It is up to management to set the cadence of the meetings and to set the expectations of behaviour.

The first issue of meeting mismanagement is that we don't understand the premise of a meeting. When you call a meeting, you are asking someone to stop doing their work and start doing your work. The remedy for this is two-fold: first, recognize you are imposing yourself on others and ask yourself is a meeting really necessary? Bill Jensen, in his seminal work *Simplicity*, argues there are three types of meetings: **brainstorming, decision making, and information sharing**. The last of these is the least important because you don't need a meeting to share information; there are many other ways to do so. So, ask yourself do I really need a status update meeting? You need to hear ideas for brainstorming, and opinions for decisions, but data can be shared in other ways.

The second issue of meeting mismanagement is rooted in the lack of role clarity. Who is accountable for the decision to be made? Clients point to this as the major cause of why there are too many meetings – they are unsure of who is accountable for the decisions and who should support the decision making. If we are unclear of others' roles, how do we know who we should have at our meetings? So, we invite everyone.

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Here's a tip – if you have both the manager and their direct reports in a meeting, you are wasting resources. If you need an instant answer, you have a serious problem. If the manager needs to get the information, then give them time but don't double up. I find that senior leaders are the biggest culprits of this. They feel they need to have all the information at their fingertips, not realizing what inefficiency they are costing the organization.

The solution is the clarity of both accountability and authority. If someone needs other opinions to fulfill their accountabilities, they need the authority to call that specific role to the meeting. Through this you gain efficiency, you can be more effective at getting work done, and you build trust.

While I have simplified things here, the meeting malaise must be a symptom of bigger issues. It represents our lack of discipline in how we work and how we engage in our work.

As well, it also represents our inability to manage risk and establish priorities, which are variations of an inability to make decisions effectively. We believe we need the information. You will also find that people flock to meetings out of a desire to “be in the know”. We need to curb that desire and focus them on their specific work and the tasks at hand.

I try to keep these missives short and, hopefully, I have given you food for thought, but the subject is much bigger than a missive and, again, is rooted in our lack of managerial professionalism. Perhaps I have given you pause for thought on the meetings you attend and ask others to attend.

Think of the World War II slogan *“Is your journey really necessary?”* only, in this case, *“Is that meeting really necessary?”*

Have a great weekend.

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## The Bigger Picture

24 November, 2023

*First off, all the best to our American friends on their Thanksgiving.*

This week, I want to explore a topic based on an event I was at last night. I had the opportunity to attend Pollution Probe's annual gala and awards presentation. Pollution Probe is one of the preeminent Canadian agencies involved in sustainability and care for our environment.

The event gave pause for thought. In the past, I have written about my involvement in Humanity 2.0 as it focuses on human flourishing, and the Flourishing at Work program of Harvard and Oxford universities.

The linkage to last night was the interrelationship between human flourishing and our planet. In an age where it seems organizations are stepping away from the discussions of environmental social governance (ESG), it was important to be reminded of the work that is going on around sustainability and protecting our earth.

Bob MacDonald, the recipient of this year's award and the well-known Canadian broadcaster and host of "Quirks and Quarks" on CBC radio, pointed out that this is the only planet we have, so we best take care of it.

If humanity is to flourish, we will have to care for our planet. This goes beyond the mandate and focus on ESG. I have heard from many who have suggested that ESG and other initiatives fashionable merely a few years ago are no longer so.

In the post-pandemic world, many causes that were enthusiastically supported have been gradually set aside. I am unsure if it is a function of the challenges of a soft economy where the word "recession" hangs about and inflation is rampant, or whether people have just moved on but, regardless, the emphasis is gone.

Will our focus on humanity and the planet go the same way? Can we afford for it to go the same way?

There are those out there trying to make a difference and they need our support and encouragement. There are no doubt co-workers who have an interest in the greater good but require reassurance. Our world has splintered and stepped away from the collective good in the interests of the individual.

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We all need to look at the bigger picture. We only have one planet, and we are all one on that planet together. As such, we need to look out for one another and our environment. We need to be resolute despite the trials we face. We also need to find a place or community where we can focus on these things. When we go home, we often withdraw to our cocoon. We need a place where we can be our best selves.

In the face of enormous challenges where we are whipsawed by the VUCA (volatile, uncertain, complex and ambiguous) world, we need to be steadfast on what is really important. As I have said many times before, I believe creating great workplace places that deliver the strategy is key. Therefore, that strategy must consider that greater good, the needs of the planet and its people, as well as the business needs.

We will continue to face challenges, but the key is to have a strategy. By strategy, I don't necessarily mean a plan, but [a definition of what we want to be](#). Choosing to define the world we want is essential and should outlive the inevitable cycle of business trends. By setting our sights on what we want for our world as our North Star we can navigate the storms ahead, but if it is to mean anything, we must ensure proper attention to the Big Picture.

We only get one chance.

Heady thoughts going into the weekend, but there is cause for hope, and a need for understanding, to help us through these days.

Have a great weekend.

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# Overloading

1 December, 2023

Welcome to December – where did the rest of the year go?

This week's topic is all about **overloading**. Overloading has continually been a complaint of clients as we explore their organizational pain. It was a big issue during Covid, but was around long before then and has followed us to this day.

When we ask about the pain inside organizations at the top, often we hear employees are feeling overwhelmed. This week, I plan to explore why that is, with some tips to reduce overloading.

Where does the overloading come from? Part of it is the reality that organizations are trying to achieve a lot these days. In the face of competition, they are piling on more projects and setting bigger goals. The issue, then, is a natural progression in a VUCA world. In this volatile, uncertain, complex, and ambiguous world, we need to set those bigger goals and add new ways to deal with all that is going on.

If we add more work, we have two choices: add more employees or increase what they do. Most organizations are not in a position to add more headcounts. So, we pile on more work to those already we have. Faced with this, employees feel we should add more staff as the solution. The result is an impasse, but there is a more realistic solution.

I argue we need to exercise continuous improvement where we remove some work to enable additional work. The problem is, employees can't unilaterally choose not to do some work. Employees would rather continue doing existing work because they are used to it rather than take on new work, so organizations hoard work. They naturally hang onto work and processes well after their best-before date because management is not practicing continuous improvement.

So, why don't managers practice continuous improvement? There are two reasons: one is that managers don't understand it is their role, and the other is the nature of risk.

Only the manager can reduce work. It is up to management to decide, for they have the insight to the Strategy. If employees have the authority to reduce their own work, you end up in a dangerous situation.

Managers don't direct employees because they don't understand their work for these reasons:

- They don't value their role; they don't see that their role is to define work for employees
- They feel uncomfortable checking in on the work of their employees

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- They are more interested in their own tasks/work and not in managing and leading others

The second reason, again, is that removing work is risky. The issue of too much work is a priority-setting exercise. The problem is that organizations don't prioritize, and so *everything* becomes a priority. Priority setting is about setting one thing as more important than another. It is akin to decision-making, where you choose one thing and reject all others.

We don't set priority because, just like when we reject all others, risk and fear take over. It is safer to keep everything happening than to risk choosing one thing over another in case we get it wrong. But, by not choosing one over another, we end up overworking our employees because they must try to do everything.

To set priorities and overcome the risk, we must think it through and ask ourselves:

1. If I prioritize A over B, what is the worst thing that will happen?
2. If I prioritize B over A, what is the worst thing that will happen?
3. If I make them the same, what will the worst thing happen?
4. In each case, what is the likelihood and the severity of 1, 2, and 3?
5. Therefore, what is the best action?

By consciously setting priorities and saying "No" to some things, you will reduce the overload on your people. If you are a manager of managers, ensuring your managers are setting priorities becomes even more important. In our experience, this is the one major failure of management.

This weekend, think of all the things on your to-do list. Is it time for your own priority setting?

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## The Concept of Anaklesis

8 December, 2023

This week is all about **Anaklesis**. If you'll recall from my previous missives about it, Anaklesis is an unusual word that has a direct impact on all organizations. It is the single biggest initiator of organizational dysfunction.

Anaklesis is from the Greek, meaning "*lean on*." Its roots are related to psychology and found in anaclitic depression, but has a greater applicability. It is the single greatest barrier to effective management, change, and collaboration. It is the very human, ingrained need we all have to rely (or "lean") upon beliefs or others. As I describe it here, ask yourself, have I seen this in myself or others?

When we lean on our beliefs, we rely on our viewpoints, experiences, and opinions. These make us feel safe and whole. Therefore, when faced with something that challenges our perspective, we find ourselves discombobulated and endeavour to return to what we relied upon. In other words, we reaffirm our experience.

As a result of our Anaklesis, change is uncomfortable, and we strive to get back to stasis. This is why people are unwilling to welcome new views. We stick to what we believe and have experienced. It makes it hard for us to see the other side of issues and leads to entrenchment in our positions and convictions.

There are extreme examples of this in today's society, but it leads to a reluctance to change inside organizations. Whenever something new and unfamiliar comes before us, it elicits an Anaklytic reaction. Reactions range from: "*That will never work here; we tried that before*", to "*I am unsure about this*". These are telltale signs of Anaklesis. However, when we hear these from our employees, we look at them negatively. We see they "aren't on the bus" or "are not team players". However, they are just having a natural human reaction to something unfamiliar.

This is why change management and change leadership are so important – it helps others to overcome their Anaklesis.

The second form of Anaklesis is the need to lean on our relationships with others. In this case, we don't want to do anything that will jeopardize our relationships with friends, family, and co-workers. It becomes the fear of damaging relationships.



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This manifests in cautiousness in our communications for fear of setting someone off and earning their disapproval. This leads to dysfunctional communication as we dance around each other, trying not to offend or risk impacting our connection with others.

This becomes a real issue for management in the workplace. Their communications often become unclear and make it hard for employees to understand. Managers don't have conversations about employees' performance or expectations. Here are some common thoughts Managers experience:

- Will the employee “quit” but not leave the company for 30 years?
- Will the employee slash my tires in the parking lot?, or,
- Are they that one employee who works hard and I rely on all the time who will put in less effort if I raise the issue?

Employees also feel the Anaklesis, often wondering, if I raise this issue with my boss, will it be a CLM (career-limiting move), or will they embarrass me in front of my peers in some way? They may also struggle to communicate if they miss a deadline my peers expect, thus damaging collaboration and trust. This, then, becomes an unsafe psychological environment.

The relationship issue is compounded if my Anaklesis is rooted in my beliefs; I don't feel safe enough or on solid grounding to discuss it. As a result, much of what goes on in organizations goes underground and we don't discuss it. When this happens, the Anaklesis, over time, leads to fear and discomfort for everyone.

If you wonder how a culture of fear occurs, look no further than Anaklesis.

This week was to re-introduce Anaklesis and get you to recognize it. Do you see yourself or your organization in any of these definitions? If yes, stay tuned for next week when I will give you some tools to deal with Anaklesis for yourself, your teams, and your organization.

Have an Anaklesis free weekend.

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## Addressing Anaklesis

15 December, 2023

Last week, I introduced the issue of [Anaklesis](#) and its role as the biggest contributor to organizational dysfunction. It is the very human, ingrained need we all have to rely (or "lean") upon beliefs, experiences, opinions, or other human beings. As a result, it leads to change resistance and gets in the way of open and honest dialogue. I promised to dedicate this week to tips and tricks for managing it.

Sometimes, we are anaklytic about Anaklesis – relying on it to forestall expensive mistakes or alienate others. Real wisdom comes from awareness of its impact and deciding to either accept it or deal with it. It is about taking the experience out of the affective realm of thinking and into the cognitive realm.

In essence, an Anaklytic reaction is in the “soft” realm; it becomes a type of fear. That is not to denigrate it because fear is very real. It becomes a fear of the new, and the fear of damaging relationships.

When dealing with Anaklesis, it is best to explore: **understanding the context, exploring the impact, and taking determined action.** There are a series of questions to ask yourself to open up and manage your thinking, but they do require initial awareness.

In understanding context, ask yourself *why* you are scared of something. Being truthful in your answers immediately helps put the situation in perspective. Stopping to think about the implications of not addressing, changing, and acting helps draw out the "*so what?*" of a situation and forces you to think about the source of hesitation. Very often, the roadblocks are simple and easily fixed once identified.

### Questions to ask yourself for Understanding Context:

- What makes me uncomfortable about this?
- Is this being forced on me by the organization?
- Is the cost of addressing this now lower than the cost of leaving it alone?
- If I overcome Anaklesis and get on with it, how will I feel on the other side of this?
- What are the benefits of addressing this?

Being honest with yourself and gaming out the worst-case scenario of both action and inaction will help frame the issue. Again, consideration of the cost of inaction can make the discomfort of Anaklesis pale in comparison.

### Questions to ask to Understand the Impact:

- Am I convinced there is a need to address this? Why or Why Not?

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- What's the worst thing that can happen if I avoid this?
  - How bad is the worst-case scenario?
  - What's the likelihood of the worst-case scenario?
  - What else is possible when this issue is addressed?

Once determined to stare down Anaklesis and get on with it, think about the hesitation and how far you can go to overcome your fear. Acknowledging that fear will work to surprise and derail you – and planning for it – reasserts your control over the situation. Keep focused on the desired future state to help push through.

### **Tactics for Determined Action**

- Develop a plan of action
- Break actions down into specific Next Actions
- Ask, "*What is the next thing I need to do to move this forward?*"
- If complex enough, write down the series of Next Actions to reduce the complexity and make the task more accessible
- Anticipate roadblocks we will put in front of ourselves like hesitation, fear, uncertainty, and procrastination
- Make a plan to overcome these – "*when this happens, I will do this...*"
- Identify and chart milestones for changes of sufficient size and complexity
- Celebrate progress, not just the finish line
- Build your resilience through reflection, practice, determination and grit

As a manager of others, you must be prepared for their Anaklesis to kick in. It doesn't mean they are not on board with any changes, it just means they need to be helped through the nature of the change. So, it would be best if you first explored how they are feeling about this new and unusual thing they face. As with all change, you need to practice the ABC's:

- Always Be Communicating
- Always Be Caring

The best way to help someone with their Anaklytic reaction is to sell the change to them. By sell, I don't mean being the snake oil salesperson, but rather helping them to want what they need. This is the essence of selling. After all, if they don't need it, then it isn't all that important.

Our job as managerial leaders is to help people through their challenges and to get good at assisting others in dealing with their Anaklesis, which is how we add value to our people.

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## 2023 Reflections

22 December, 2023

Well, here we are – this will be the last weekly missive of 2023. Hopefully, like me, you will be able to relax over the next week or so to be back at it again in the New Year.

2023 was a interesting year for many of our clients and for ourselves. The lack of clarity of markets, with rising inflation and international and civil strife, made it challenging. If we had a VUCA world before 2023, it would have been only heightened this year. Yes, the days of the pandemic are over (or are they?), but the world is disrupted. History has shown us this is often the case after upheavals of world wars and pandemics, but there may be little solace in knowing this.

So, in reflecting back on the year that was, I have been trying to ascertain the major take aways.

1. As a world we have become fractionalized. It was there as we watched the early days of COVID, and it hasn't changed. With this "breaking into parts" we have become very binary in our thinking. Phrases like "*you are either with me or against me*" have become the watch words. We need to come together in a shared sense of humanity. While we may be all very different, there are some common shared goals, and the preeminent one is that all we want to be is happy – so lets work together to be happy.
2. People are not flourishing. They are not happy; stress and trauma is eating away at us all. Over the last year, I have written extensively on the need for humanity to flourish. For those of us in business, it is about helping to create a workplace where people can grow and succeed. In other words create great places to work that achieve the strategy. To help people to flourish, we need to practice the golden rule of leadership, "*know your people and promote their welfare*".
3. We are losing sight of our shared humanity in our binary approach to life. We need to be open and welcome new insights rather than only through the lens we have been using. Now, more than ever, we need to redescribe our world and see the glass is half full, not half empty. We need to look for the inherent good in others and withhold our prejudices and judgements. We must be willing to help one another.

This is the time of year for just this type of thinking. As leaders we need to be enlightened in that we practice authentic, servant, and transformational leadership. We must look for the common good even in the dark days. We must strive for the win-win solutions.

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So, this holiday season, and on the advent of a New Year, I hope you have found some positive thoughts to cling to. What is happening right now shall pass, and we must ensure that no one goes through this storm alone. That is the essence of leadership.

I wish you the very best for your family, and here is to a great 2024.

