

Book reviews- 2011

Developing Adult Learners

Taylor, Marienau, Fiddler- 2000

Overview

- ❖ Learner's experiences to be used as a tool
- ❖ Adults programmed to think of learning as what (set of facts, how pages, what will be on the test, etc)
- ❖ Instead they should think in terms of how to learn- drawing on their professional and personal experiences. How can these experiences extend their view of themselves as to who they are and who they want to be?

Chapter 1- Linking Learning with Development

- ❖ Adult learners may be highly motivated to learn but may focus on evaluations or grades rather than learning
- ❖ They like to think of themselves as “self-directed” yet feel short changed when the educator explains he / she will be less of a source for answers than a source for learning
- ❖ Learners may seek ways to improve their job performance but deny themselves the practice it takes to develop new skills
- ❖ Change is a major ongoing factor in adults' lives and thus in their engagement with learning. Their learning may grow out of larger life issues such as staying in a unsatisfying job, trying a new career at the expense of family financial security
- ❖ As what adults learn may have a more immediate impact on their lives, they may bring a greater sense of urgency to their learning and seriousness of purpose
- ❖ Despite this motivation, many may feel inadequate about being judged in a formal learning setting
- ❖ Many believe (possibly listening to the past demons) that they are not intelligent enough to learn. As an educator, it is essential to build their self-esteem and confidence! Thus leads to researching material, critically analyzing it, which hopefully leads to trusting themselves.
- ❖ Major difference between adult learners and younger learners is their wealth of experience. These experiences can be essential contributions to the learning process.
- ❖ Learning and changing- Most adults who seek formal learning as a means of dealing with external change often don't realize this process will lead to internal change.
- ❖ Adult development- can be traced to ancient times- poets, philosophers.
- ❖ Development, defn- *a process of qualitative change in attitudes, values, and understandings adults experience as a result of ongoing transactions with the social environment, occurring over time but not strictly as a result of time.*
- ❖ Four aspects of development
 1. People develop through interactions with their environment
 2. Development follows a cycle of differentiation and integration
 3. Within individuals development is a variable (not uniform) process

4. The ability to reframe experience serves as a marker of development

Environmental interactions

- ❖ Experience is created by interactions between external conditions and an individual's personal needs. Development takes place as a result of environmental prompts as people act in the world and the world acts on them. How adults experience this interaction is influenced by how they perceive and make sense of the events that make up the experience.

Differentiation and Integration

- ❖ Development can also be viewed as an ongoing cycle of differentiation and integration. When adults encounter events that cannot be assimilated into their frames of reference, differentiation may begin. They then realize that their being (unconsciously) is made up of parts that do not form a coherent whole. Differentiation leads to integration, dependent on larger and complex frames of references.

Variable Process

- ❖ When people operating from one set of beliefs encounter another set of beliefs, there may be a possibility to change one or both sets of ideas. People may eventually come to see and understand things differently. However, some aspects of the development may not happen at the same time.

Reframing Experience

- ❖ Life themes refers to beliefs that guide an individual choices and understanding such as responsibility, success and competence. They often originate in childhood, develop in adolescence and emerge during adulthood. How people interpret these themes affects how they perceive new experiences.
- ❖ Learning and development- These four aspects have elements common with learning. Through reoccurring interaction with their environment, people interpret what is going on through their existing frames of reference. The dynamic intersection between learning and development concerns the fundamental change in how meaning is made. Learning is understood as a process using prior interpretation to construct a new or revised interpretation of the meaning of one's experiences to guide further action.
- ❖ Educating with development in mind- adult educator's primary focus is not to impart information but create an enthusiasm for discriminating between conflicting ideas and to counter rigidity of belief. Success may be defined in terms of transformational learning. Reproductive learning does not allow one to challenge beliefs. However, by drawing on experience, critically examining it and arriving at an understanding based on past experience as well as new information are more likely able to be flexible in thinking, hold multiple perspectives and deal with ambiguity. They are not just adapting to new ideas but moving toward changing the way they construct the ideas they hold.

- ❖ Focusing on the developing the individual is essential towards creating a better society. *Adult development is influenced by the educational environment, hence by choices and intentions of educators with regard to teaching, training and learning.*

Chapter 2- Key theories that inform Practice

- ❖ When adults realize they construct their ideas and beliefs, that they can re-construct them, they experience the world around them differently.
- ❖ The possibility that knowledge is constructed, rather than coming from an external source (feed to us) is a notion about human understanding
- ❖ Constructivists- it is impossible to demonstrate that we know something as it *really* is as opposed to how we perceive it. Knowledge is thought as the best *creative construction* of which an individual is capable.
- ❖ As one enters adulthood, life becomes less right versus wrong, black versus white. Instead ideas may be in conflict with each other. Ideas that were internalized are questioned. Educators must be aware of these changes. Adults have this ability to transform. Educators must focus on learner's conceptions and their feelings, perceptions and actions as part of the education experience.
- ❖ Adults may transform from active experimentation to reflective observation. They may also grasp between abstract conceptualization and concrete experience.
- ❖ Experience does not happen to us, events happen to us. An experience is something one does, thinks or feels. For an event to become an experience requires being present or recalling an event and accepting or valuing it.
- ❖ Reflection can be defined as thinking and feeling activities which individuals engage in order to lead to new understandings. Critical reflection means one takes reflection to a higher level. One asks "why do I think this way?"

Chapter 3- Teaching with Developmental Intentions

- ❖ Many educators incorporate some aspect of development into their teaching / training.
- ❖ Theories provide framework to guide the practice. The development aspects provide focus.
- ❖ Development as a Dynamic Process- while theories may be linear, individual growth is not. People engage in actions, they have the capacity to recognize differentiation and integration in their lives. Their development is always in process- not arriving.
- ❖ Toward knowing- as people exchange ideas, they gain insights that would not have arrived at on their own. Even if they do not agree, they examine their beliefs to this new information before accepting or rejecting.
- ❖ A mark of development is the capacity to see oneself and one's beliefs from multiple perspectives. However, biases limit our thinking. Being able to get past our limits determines our growth.
- ❖ Towards a Continuous Learner- for experience to lead to learning, education must be viewed as a continuous process of reconstruction of experience. To become continuous learners, adults must not conceive of their responsibility as acquire

packets of information. Rather than reacting, continuous learners anticipate the learning needed to prevent and solve problems. They seek out formal and informal information, instruction and feedback from others.

- ❖ Toward Connecting with Others- much psychological theory frames human development in terms of individuality or separateness and autonomy. Development grows out of ongoing interaction among people. Relationships are created. Autonomous people are not indifferent to others. They reach their beliefs without being influenced by others.
- ❖ People moved toward the connection with others are likely to see themselves as a part of something larger. They recognize how things are mutually independent. Adults have the ability to question the goals various endeavors at the same time examining their own beliefs.
- ❖ Many believe that culture plays a role on learning (and those helping to learn) and the implications of learning for development.

Chapters 4 – 10

- ❖ Description of over 70 activities with corresponding strategies.

Chapter 11- Teaching and Training Matters

- ❖ For most adult educators, the goal is to share power and control. This contradicts traditional methods we are use to where the “teacher” is in control.
- ❖ However, some adult learners resist participating because they want to be taught after paying good money, feel threatened that they can’t learn or don’t want to share in a group setting or have been forced to attend a lesson (and being in denial don’t feel they need to be there).
- ❖ When learning is voluntary, people still may view education as authority based – transmission of information or skills
- ❖ The compromise is to hold one out as the “expert” who will ask the group to share their experiences. The expert fills in these experiences.
- ❖ Self-direction- has been a source of much discussion. Some feel this is what separates adults from young learners. While many adults have a clear sense of what they want to know and most want to discuss ideas (versus being lectured to), they still want the instructor’s expectations spelled out for them. The challenge is filing the gap between “just tell me what to do” and “I can make my own decisions”. The learner must shift from authority-directed to where learners assume greater responsibility. Not all programs can support this style.

- ❖ Facilitating discussion- As we respond to questions, we reinforce the notion that we are the source of information, as deemed experts (that’s why we are in front of the class). One of the best ways to educate is to ask questions. Allowing the class time to respond. Silence is okay and permissible. It takes great skill to employ critical questioning. One must be sensitive to the student’s level of knowledge, cultural differences, etc.

- ❖ Covering the material- encouraging learner input may threaten the ability to cover the curriculum because of the additional time required to allow for discussion. This requires careful planning. Having more material is a must in cases where the students don't know or cover the material quicker than anticipated.
- ❖ Assessment- most students are programmed to think that what is assessed is what should be learned. To combat that, self-assessment is encouraged.
- ❖ Starting where the Learner is- some educators feel that one cannot educate without starting from the learner's perspective. Making assumptions about their knowledge may be flawed. Starting from the learner's perspective may create new experiences new to the content. Not everyone may feel comfortable with this approach and a warming up period may be required.
- ❖ Limitations of experience- this may limit one's participation. They may not think beyond what they already know or develop any new capabilities.
- ❖ Incorporating experience-
 1. Understanding others' ideas through examining others' experiences
 2. Illuminating others' ideas by relating them to your own
 3. Interpreting one's own experiences by using others' ideas
 4. Deriving ideas from one's own experiences
 5. Interrelating experiences and ideas from others and yourself.

Chapter 12- Observing our Practices

- ❖ Educating others is a challenge. The struggle is making meaning of our training experiences and striving to learn from them.
- ❖ As adult educators or adult learners, engaging in critical self-reflection about our assumptions, values and perspectives can further prompt our development.
- ❖ Should we be creating an environment designed to elicit certain responses? Should we be more concerned with facilitating self-actualization and encouraging learners to set their own learning contexts?
- ❖ The setting / environment for training should be consistent with an organization's norms and expectations. This includes being consistent with corporate philosophy.

Chapter 13- Accepting the Challenges of Growth

- ❖ When we no longer consider learning to be primarily acquisition of knowledge, we can no longer view teaching as the bestowal of it. If learning is about growth and growth requires trust, then teaching is about enduring trust and about caring for growth.
- ❖ Two factors are essential for developmental growth- support and challenge. Support is providing confirmation to the learner and positive feedback. Challenge is encouraging stretching, leaving what is comfortable to attaining a new level of competence.
- ❖ Mentoring is one means where support can be provided and one can be challenged at the same time.

- ❖ Many educators will be challenged as some learners are not okay with leaving what is comfortable. It is human nature not to accept change. Those who embrace change are secure with themselves.
- ❖ As adult educators, we cannot say that development intentions will achieve developmental growth. The latter is dependent on the state of mind of the learner. It also requires significant time to be meaningful.
- ❖ No educator has the right to decide someone else's world needs to change or should change. All we can do is show the benefits of change.
- ❖ Even if learners grow as prescribed by developmental intentions, the self-growth may not be insufficient. It may mean that further growth is required.
- ❖ Acknowledging the importance of development in adult learners may mean that adult educators must recognize ourselves as developing adults.
- ❖ To facilitate the change in others, we should recognize that we may learn as much as those we are teaching. As we come into the lives of adult learners, our best and greatest influence may be our willingness to travel with them in this journey.

Discover Your Sales Strengths

Benson Smith & Tony Rutigliano- Gallup Organization, 2003

- Many sales organizations do not know what qualities to screen for when hiring sales people
- Keys to sales success are:
 1. Discover your strengths
 2. Find the right fit
 3. Work for the right manager
- Best performers:
 - build relationships
 - have an impact on others
 - discover and solve customer needs
 - drive their performance by focusing on meaningful goals & rewards
 - find the right structure to perform their best
- Fit is not about what we know, it is about what we are. Fit is about talents and not our knowledge.
- Great sales myths:
 - Data counts
 - One's Education is the end all for hiring the right person
 - Experience is the end all for hiring the right sales person
 - A good sales person can sell everything
 - The right sales approach will overcome all barriers
 - Training is a critical in sales success
 - Money motivates all successful sales leaders
 - People can do anything if they have the right desire
- Seeing our own strengths is difficult because:
 - We lack objectivity
 - View others without same strength as lacking

- Strengths are enhanced by our experiences, our skills and knowledge. But the most important underlying factor is talent.
- Talent themes that are strongly pronounced in us are the keys to building strengths and delivering exceptional performance
- Talents are part of our hard wiring. Once formed, they are with us for life.
- Signature themes are your most dominant areas of talent. Knowing your signature themes is key to understanding areas where your talents will allow you to outperform others.
- Talents can be:
 - About doing something or wanting something
 - Rapid learning
 - Comes from satisfaction
- All top sales people have coaches who help us reach our potential and block out unnecessary distractions
- The Strengths Finder Profile:

- Through a series of questions identifying our top five strengths out of a possible 34
- Your dominant themes demand attention and demand to be fed
- The biggest problem with limitations is not having them but the gross misconceptions we have about them

- Q12
 1. I know what is expected of me at work
 2. I have the right materials / equipment to do my work right.
 3. I have the opportunity to do what I do best every day.
 4. In the last 7 days, I have received recognition or praise for doing good work.
 5. My manager cares about me as a person.
 6. There is someone at work who encourages my work.
 7. My opinions seem to count.
 8. The mission makes me feel my job is important.
 9. My associates are committed to doing quality work.
 10. I have a best friend at work.
 11. Some one has talked about my progress in the last 6 months.
 12. This last year I have had opportunities to grow and learn.

- Building customer engagement and maintaining client satisfaction is a cornerstone to sales success
- Being a sales manager requires different skills than a successful salesperson
- Excellence as a manager does not come from making others like you, its about getting people to be more like themselves- utilizing their strengths in a sales environment

Feel the Fear and DO IT ANYWAY

Susan Jeffers

Level 1 Fears- things that happen (aging) and those things requiring action (going back to school)

Level 2 Fears- not situation orientated but ego related (rejection)

Level 3 Fears- I can't handle it (aging, rejection, etc).

- ✓ Truth 1- the fear will never go away as long as I continue to grow.
- ✓ Truth 2- the only way to get rid of the fear of doing something is to go out and Do It.
- ✓ Truth 3- The only way to feel better about myself is to go out ...and Do It.
- ✓ Truth 4- Not only am I going to experience fear whenever I'm on unfamiliar territory, but so is everyone else.
- ✓ Truth 5- Pushing through Fear is less frightening than living with the underlying Fear that comes from a feeling of helplessness.

Fierce Conversations

Susan Scott- May 2006

Definition. One where we come out from behind ourselves and into the conversation and make it real. Why?

- ❖ Because the conversation is the relationship.
- ❖ Its about moral courage. Fierce is an attitude, a way of conducting business, a way of leading, a way of life.

The Seven principles are:

1. Master the courage to interrogate reality. “No plan survives its collision with reality.
 - ❖ We don’t know what people are thinking unless they tell us. And even then, there’s no guarantee they are telling us what they really think.
 - ❖ What each of us believes to be true simply reflects our views about reality. Perhaps it is no longer the truth in today’s environment.
 - ❖ Remove the word *but* from our conversation and substitute the word *and*.
 - ❖ Mineral rights happens when you are drilling for water. Its better to drill one hundred foot well than one hundred one foot wells. This helps you interrogate reality, provoke learning, tackle tough challenges and enrich relationships.
 - ❖ Integrity requires alignment of our core values and our actions. If your behavior contradicts your values, your body knows.
 - ❖ As a leader, you get what you tolerate.
2. Come out from behind yourself into the conversation and make it real.
 - ❖ Authenticity is not something you have, it is something you choose.
 - ❖ Successful relationships require that all parties view getting their core needs met as being legitimate.
 - ❖ All bread crumbs lead to the CEO’s office.
 - ❖ All conversations are with myself, and sometimes they involve other people. We try to see people as they are. In truth, we see them as we are.
 - ❖ Thus, before we can come out from behind ourselves with others and make conversations real, we must know who we are and where we are going.
 - ❖ Our bodies manifest the pictures our minds send to them.
 - ❖ Take yourself seriously. Take your life personally. Otherwise, there won’t be enough of *you* there.
3. Be here, prepared to be nowhere else.
 - ❖ Think about the kind of attention you bring to your conversations. When someone is talking, where are your thoughts?
 - ❖ Every conversation has to count. Something needs to be set in motion as a result of our time with others.
 - ❖ The conversation *is* the relationship. It happens one conversation at a time.
 - ❖ Having *soft eyes and ears* helps make contact during conversations. Soft eyes means not focusing on one thing but allowing the world come to us. Soft ears means listening to the message.

- ❖ What is the opposite of talking? Is it waiting to talk? Many think that not speaking when someone is talking is the same as listening. Hearing the words is only the beginning.
 - ❖ Common mistakes during one-to-ones.
 - Doing most of the talking
 - Taking the problem away from someone
 - Not inquiring about feelings
 - Delivering unclear messages
 - Allowing interruptions
 - Canceling the meeting
 - Running out of time
 - Assuming one-to-ones are effective.
 - ❖ The secret rule- not to make a declarative statement until the other person declares the action they need to take. Otherwise you let them off the hook.
 - ❖ Come into the conversation with empty hands. Bring nothing but yourself.
 - ❖ She who has the shortest to do list wins.
 - ❖ If your employees believe their job is to do what you tell them, you're sunk.
4. Tackle your toughest challenge today.
- ❖ Mole whacking is dealing with situations but not the source of the problem. The Leader's role is to give up mole whacking and take up grub hunting (focus on the solution. Let others come up with the solution).
 - ❖ The problem named is the problem solved. We need to open our eyes on the problem, which often is right in front of us.
 - ❖ Confronting others or their behavior is a common problem. Most shy from confrontation because it could just escalate the problem, we could be rejected, lose the relationship, it is easier to do nothing, the person could retaliate, you might hurt someone's feelings, I could be part of the problem.
 - ❖ The outcomes we fear if we confront someone's behavior are guaranteed to show up if we don't. it will just take longer.
 - ❖ When confronting behavior, be clear, clean and calm. Be prepared and concise. Talk about the repercussions, your role and the intended end result. Don't sugar coat things.
 - ❖ If we know something must change, then know it is *you* who must change it.
 - ❖ Reasons or results. We get to choose.
5. Obey your instincts
- ❖ It is only with the heart that one can see rightly, what is essential is invisible to the naked eye.- Little Prince
 - ❖ There are things are gut knows long before our intellect catches on.
 - ❖ Concentrate in your conversations. What are people saying? What are they not saying? What do they really mean?
 - ❖ Sometimes we don't know what we think until we hear ourselves say it out loud.
 - ❖ How we enter conversations is how we emerge from them.

Private thoughts	Neutral Zone	Public thoughts
What you think and feel but don't say	You are aware of what you think and feel without attachment	What you see and hear. What is shared and known
Assumptions and judgments.	You don't claim it's right or special. It just is.	

- ❖ The most valuable thing any of us can do is find a way to say the things that can't be said.
- ❖ The fundamental outcome of *most* communication is misunderstanding.
- ❖ Our context determines how we experience the context of our lives.
- ❖ We can believe what we choose. We are answerable for what we choose to believe.
- ❖ A careful conversation is a failed conversation.
- ❖ Your confusion is an asset; your search for clarity may blaze a path for others. In attempting to resolve your confusion, you may clarify things for yourself and others along the way.

6. Take responsibility for your emotional wake.

- ❖ Our emotional wake determines the story that is told about each of us in the organization.
- ❖ Appreciation, praise, unfiltered, unqualified. There is so little of it going around.
- ❖ You must extend to others what you want to receive. It begins with you.
- ❖ Don't sacrifice results in favor of efficiency.
- ❖ Learn to deliver the message without the load.
- ❖ Do not begin conversations with truthfully, frankly or honestly. It does not deliver the desired affect.
- ❖ Sometimes saying no is the solution.

7. Let silence do the heavy lifting.

- ❖ The best leaders talk *with* people, not *at* them.
- ❖ A North American characteristic is general discomfort with silence in conversations. It makes us nervous. It can also be helpful. The more emotionally loaded the subject, the more silence is required
- ❖ Never mistake talking for *conversation*.

A basic truth is that Business is fundamentally an extended conversation- with colleagues, customers, partners and the unknown future. However, most conversations fail. We need to be black-belt conversationalists.

Team conversations- engaging people to clarify goals, solve problems, evaluate opportunities, design strategies

Coaching conversations- engaging individuals to increase clarity, improve understanding and provide impetus for change.

Delegation conversations- Clarify responsibilities; raise the level of accountability, ensuring each person has a clear path of development.

Confrontation conversations- Engage individuals which successfully resolve attitudinal, performance or behavioral issues.

Before Fierce	After Fierce
Focus on activities, focus on no, stalled initiatives.	Focus on results, accountability, initiatives executed.
Beating around the bush, nothing changes.	Naming and addressing issues. Impetus for change.
Us versus them.	High levels of collaboration.
Overwhelmed by tasks. Everything is a priority.	Timely resolution of challenges. Clear priorities.
Leaders micro-managing, no development.	Improvement in effectiveness. Bench strength developed
Customer relationships based solely on price. Difficulty maintaining margins.	Relationship beyond price. Customers engaged on an emotional level.
Original thinking is happening elsewhere.	Shared standard of performance.
Culture of terminal niceness.	Effectively confronting issues.

“Good to Great” -Jim Collins

November 2002

Chapter 1- Good is the Enemy to Great

- ❑ Good is the enemy to great is not a business problem but a human problem.

Chapter 2- Level 5 Leadership

- ❑ Most Good to Great Companies have humble but driven leaders who
 - ✓ Look out the window (and credit others) when being praised for their company's turnaround and look in the mirror to accept blame when things go wrong.
- ❑ It isn't good enough to have the right people pulling with you.
 - ✓ You must have the right people in the right seats of the bus at the right time to make it work properly.
- ❑ It is generally the Level 5 leaders that set them apart from comparison companies.

Chapter 3- First Who...Then What

- ❑ You also need to know how to get rid of the wrong people off the bus.
- ❑ If you have the right people, they will tell you where to drive the bus and will get you there. Comparison companies had geniuses surrounded by great companies and failed when the geniuses left.
- ❑ If you are looking to hire someone and can't find the right person, don't hire just anyone. Wait till you find the right person.

Chapter 4- Confront the Brutal Facts (yet never lose faith)

- ❑ The Stockdale Paradox- Retain faith that you will prevail in the end, regardless of the difficulties and the same time confront the brutal facts of your current reality, whatever they may be.
- ❑ Vision comes from leading with questions, not forcing the vision.

Chapter 5- The Hedgehog Concept

- ❑ Hedgehogs have a very simple view of a complex world, see what is essential and ignore the rest.
- ❑ The concept
 - ✓ What are you deeply passionate about?
 - ✓ What can you be the best at?

- ✓ What drives your economic engine?

Chapter 6- A Culture of Discipline

- As one grows, it trips over its own success by bringing in too many new people, too many new clients (more than they can assimilate properly), too many new products.
- More hierarchy grows to accommodate new growth but often the old culture disappears. “This isn’t fun anymore”. The challenge is to maintain discipline.
- This means:
 - ✓ Disciplined people- those who don’t need to be managed
 - ✓ Disciplined thought- facing brutal facts but retaining faith in the path to something (finite) great
 - ✓ Disciplined Action- having the nerve to say no (a stop doing list) and staying the course

Chapter 7- Technology Accelerators

Chapter 8- The Flywheel and the Doom Loop

- For break through companies, there is no defining moment that takes them from good to great. More so, it is a matter of:
 - ✓ Embracing the hedgehog concept
 - ✓ Getting some great results
 - ✓ People buying in (internally and externally)
 - ✓ Momentum continues until Wall Street notices
 - ✓ For inside, there is no difference, much like inside the egg before it hatches
- For the comparison companies, often the doom loop happened. This occurred when:
 - ✓ A big announcement about a product was made
 - ✓ The results were disappointing
 - ✓ People became discouraged
 - ✓ The company changed direction and repeated the cycle

Chapter 9- Built to Last

- Built to Last companies use same principles as Good To Great
 - ✓ CEOs take small entrepreneur companies from good to great
 - ✓ Good to Great is a prequel
 - ✓ Discover core values and purpose beyond making money
 - ✓ BTL answers question what is the difference between good big idea and bad good idea.
- What work makes you feel compelled to greatness? If you must ask Why should we try to make it great, you are in the wrong business.

Marketing to Women

Marti Barletta, 2003

Unveiling the Market

- Women should be marketed differently because their purchasing thought process is much different than men's
- 8 myths
 1. marketing to women supports diversity
 2. core focus should be on core customers- men
 3. average income for women lower, doesn't make sense to go for low-income market
 4. marketing means you have to double the marketing budget
 5. marketing is all about relationships
 6. best focus is within an emerging markets group
 7. gender-neutral marketing is what women want
 8. gender- specific marketing doesn't work

Power of the Purse

- more women advancing with degrees, workplace goals for women higher than previous generation, earning power has increased (not yet at parity)
- women are ultimate asset holders- accumulating assets, number increasing
- main purchaser of domestic products, increasing number of big ticket items
- more women controlling corporate cheque books as women climb corporate ladder or become entrepreneurs
- tend to be more loyal and will tell people about great products or services- word of mouth makes them more profitable

Differences that make a Difference

- Men are may be physically stronger, women stronger in aptitude for some areas, equally as intelligent
- Stronger senses and more sensitive, more focused on emotion versus the facts

Gender Trends Marketing model

- The Star- model for organizing gender differences. What women bring to the table
 - Social values- different beliefs and aptitudes about how people should relate to each other
 - Life / time factors- implications of ways women's roles differ
 - Synthesizer dynamics- consistent differences in how women perceive and process
 - Communication keys- different patterns and rituals of expression
- The Circle- what companies bring to the table

- ❑ The Spiral Path- men make decisions is a linear method- a good solution
- ❑ Women look for the Perfect Solution spiraling through the process
- ❑ Without gender expertise, you don't have the in-depth knowledge of your consumer and won't be able to motivate, it will look like everyone else's
- ❑ Without marketing expertise, you won't have the practical knowledge to develop programs to motivate women consumers
- ❑ Gender Trends Marketing model = Gender expertise + Marketing experience

The Star Gender Culture

- ❑ Women:
 - Look for relationships, include people (team players) and empathize
 - Instead of being a winner, they are warmers
 - Don't occupy pyramid (having to be at the top), they crave a peer group
 - Women look for complete picture, don't skimp on details
 - Thrive on multi-tasking (see single task a waste of time)
 - Empathize- put things together
- ❑ Men:
 - Look for solutions, simply things
 - I versus we
 - Rules are very important
 - Analytical- take apart things
- ❑ Will outlive men. Between years 2000 and 2010, 55 – 64 population will grow by 48%
- ❑ Communication- men- one-up (better), one down & put down. Women- same / same- (can relate to), scoop (pick the other person up), gift exchange (trading information, stories rich with details)
- ❑ As women get older, they get more aggressive as testosterone overweighs estrogen (nesting and overriding testosterone)
- ❑ As men get older, they get more mellow as testosterone decline
- ❑ Women cherish- girlfriends, men who are thoughtful, children's accomplishments
- ❑ Women take pride in- warm orderly home, appearance, caring, multi-tasking, being needed
- ❑ What they care about more than men- being around other people, collaborative interaction, wants it the way she wants it
- ❑ What they enjoy the same as men but are overlooked- challenge and achievement, working
- ❑ What they don't care about- getting ahead of the Joneses, gloating, bragging, facts and features, how things work
- ❑ What they want that men don't- help and other opinions, emotions

The Spiral Path

- ❑ Men will not ask for sales people's help, view it as a sign of weakness
- ❑ Will do all their research on their own and will buy goods based on a limited number of criteria
- ❑ Women seek the perfect Answer. Will seek sales person's opinion because they want to learn and are more relationship orientated
- ❑ Instead of eliminating criteria, women add more. Thus it takes them longer through the decision making process
- ❑ Men buy, women shop.

- ❑ For financial planning, men take a shorter amount of time picking a planner (limited criteria) but take more time on subsequent business
- ❑ Women are the opposite. Longer initial to buy. Once the relationship and trust has been established, not concerned about subsequent dealings
- ❑ Women tend to be more loyal- relationship grounded

Market Assessment

- ❑ Finding your market- why women and which women (segmentation)
- ❑ Situation scan (SWOT)- comparing your company to competitors to determine opportunities for you / weaknesses of others
- ❑ Using women only focus groups can be beneficial, they don't offer as many opinions in mixed groups

Strategy and Tactical Planning

- ❑ Creating a brand- target communications to your consumer, distinguish yourself from your competitors
- ❑ Positioning- speak to today's woman, emotion- make her care about your brand
- ❑ Give her news, she is seeking information
- ❑ Make a good impression
- ❑ Make it easy for her to come back
- ❑ Capitalize on her loyalty- cross-sell and up-sell

Communications that Connect

- ❑ Circle of influence- review your communications to determine if it delivers equally well to men and women and then look at its impact on women overall
- ❑ Connecting versus Reaching- pay more attention to contextual value
- ❑ People First, personalize the brand, warmer wins over winner
- ❑ Today's women know how to cope with chaos, don't treat her like a super-mom
- ❑ Choose women who aren't 20 something glamour goddesses for advertising, unless that's your market
- ❑ Make them laugh. Don't use put downs, use stories women can relate to

You Play to Win the Game

Herm Edwards- 2004

- The journey is just as important as the result. The result is you play to win, never settle for anything else.
- Courage and initiative comes when you understand your purpose in life.
- Find & focus- A vision is a dream with a plan.
- Put everyone in a position to succeed.
- Create inconvenience. When you get comfortable, that's when you make mistakes. Step out of your comfort zone and take calculated and planned chances.
- Delegate leadership because you can't do it by yourself. Develop a vision and find the best people to carry it out. Ensure your leaders know what is expected of them and the people they are leading.
 - Be committed to excellence.
 - Be prepared.
 - Be positive.
 - Pay attention to details.
 - Be organized.
 - Be flexible.
 - Be ethical.
- **Make the Will stronger than the Skill.**
 - Outworking someone can make up for lack of skill. Desire is not readily readable.
- Understand that Life is not a dress rehearsal. Make sure you do your best at all times. It's up to you to figure out what your talent is and then use it to the best of your ability.
- Teach the Why. To be an effective leader, you need to teach people why you want them to do something and why it works.
 - Give people as many tools as possible to make it happen. It helps understanding and makes them feel more important in the process.
- Try not to focus on the actual mistake but rather how people respond to it- how you can learn from it.
- Identify the necessary sacrifice.

- Watch the clock. When you are late, you are telling people that you are more important than they are.
- If you focus on the process, how to get it done, rather than the result, you will always win. Winning matters but you can't predict whether you are going to win or not.
- Discipline is little things that require mindset and effort.
- Good habits form who you are so form good habits.
- Look beyond the mirror. A mirror reflects someone's face. Their friends reflect what they are really like.
- Don't point fingers.
- Worth is what you feel inside from the effort you give to do your best in your work and life. Money does not equal worth.
- Never look down on anybody unless you are helping them up.
- What you do in the Dark (when no one is watching), will come to the light.
- Make everyone accountable.
- Don't waste energy on the unknowns (what ifs). It's a waste of energy and is beyond your control.
- When someone is able to take abuse with a smile, they are worthy to become a leader.
- Two of the most beautiful metals in the world are silver and gold. They are refined by intense heat that force impurities to the top. The impurities are skimmed off the top to improve the quality of the metal. Suffering through problems and situations allows the moral impurities of our character to surface.
- Exhaust your options.
- **Do the corners** (do all the work and do not cut corners). Often it is the little things that mean the most.
- Ask tough questions of your self.
- You never really know when opportunity is going to present itself. You have to be prepared when it arrives. It is important to evaluate an opportunity and decide whether it is something that is right for you.

- Don't be afraid of what you don't know. (Feel the fear and do it anyways). Many don't learn about what they don't know because they are afraid. So, they allow their lack of knowledge to become so rigid they never learn anything new.
- Know your opponent but don't dwell on them or else you forget your strength. Focus on how you are going to improve.
- **You can treat people differently as long as you treat them fairly.**
- It is important to know what is going on around you but just as important not to let pressure interfere with what you see.
- Surround yourself with good people and let them teach you what they know.
- Worry about what you can control. If you can keep yourself concerned with what you can change or alter, then life will become much easier to navigate.
- Don't let the quicksand (bad stuff) suck you under.
- Good teams and good leaders learn how to finish, it is an acquired skill driven by a true passion to succeed.
- **You can't tell me that something good didn't happen today.**
- You have to create hope for people because when you deny a person of hope, when they think they have no hope, they give up.
- **If someone asks me if the glass is half full, I tell them it's the same amount of water.**
- Don't be afraid to fail. The great thing about being successful is that you have no fear of taking risks. People look and stare and do nothing because they are afraid to fail so they talk themselves out of it.
- **How someone handles praise and success can tell you much more about someone than how they handle criticism.**
- If you forget what you did to get to the level to be praised and successful, you have nowhere to go but down.
- Many people think that overcoming adversity is the toughest thing you face in life. Others believe it is overcoming the gratification that comes with achievement. It is far easier to over-glorify what you have done than pull yourself through tough times.
- **Valuing your name is the only thing that has real value.** Valuing your name also means valuing your word.

- All experiences are good. A bad experience happens when it repeats itself and you didn't learn from it the first time.
- **Embrace giving.** We must work hard to make a living, but it is what we give that shapes our lives. Its not about what you are going to get, its about you are going to give back that determines your legacy.
- Giving back keeps you grounded. It inspires you to know that perhaps you have touched someone's life in a meaningful way.
- When the spotlight shines on you, make sure it also shines on those who helped you along the way. You will reap more personal reward if you deflect praise to someone else.
- Instilling pride really means creating an environment that people feel good about being in.
- Autograph your performance.
- People should be treated with respect as long as they are doing the same for you.
- Make sure you are living a life that reflects what you stand for. Because at the end of the day what you stood for tells the story of your life.

Quiet Leadership

David Rock

Definition-

- ❖ Leaders who are masters at bringing out the best performance in others without telling them what to do. They help people's thinking by improving their brain's process

Why should Leaders care about improved thinking?

- ❖ People are paid to think. 40% of employees are considered knowledge workers. For mid-managers and above, number is closer to 100%.
- ❖ Generation X and Y coming into management have different needs. They demand more from Leadership than in the past (command and control).
- ❖ Pace of change was accelerated. Leaders need to lead, workers need to think. Not everything can be passed down.

Recent discoveries about the Brain

- ❖ The brain is a connections machine. It makes connections based on our past beliefs and actions. In order to think new, we must unlearn the old and create new "pathways".
- ❖ Most of what we learn is hard-wired as it becomes easier for the brain to store "memory". When we encounter something new, our brain compares the information to our previous mental maps.
- ❖ Changing the way people think is one of the tougher challenges of L.
- ❖ When external realities change, people tend not to keep pace.
- ❖ New habits take time. Our brain must incorporate the new thinking amidst the chaos of remembering what we should be doing.
- ❖ To improve people's performance, our job is to help them find new ways to approach situations that leaves their existing hard wiring alone. This means we need to help them focus on solutions and not problems.

The Six Steps to Transforming Performance

Step 1- Think about Thinking- Let them do all the thinking

- ❖ Focus on solutions
- ❖ Remember to stretch
- ❖ Accentuate the positive
- ❖ Put process before content

Step 2- Listen for Potential

- ❖ Actively listen to people
- ❖ Clarity of distance
- ❖ Blocking out filters

Step 3- Speak with Intent

- ❖ Succinct
- ❖ Specific
- ❖ Generous
 - Choosing your words
 - Being sensitive
 - Paying attention
 - Acknowledging people
 - Being human

Step 4- Dance of Insight

- ❖ Placement
- ❖ Questioning
- ❖ Clarifying

Step 5- Creating new thinking

- ❖ Current reality
- ❖ Explore Alternatives
- ❖ Tap their energy
- ❖ Feelings

Step 6- Follow-up

- ❖ Facts
- ❖ Emotions
- ❖ Encourage
- ❖ Learning
- ❖ Implications
- ❖ New
- ❖ Goal

Putting the Six Steps to Use

- ❖ Ideas are not enough, they do not last. Something practical must be done with them.
- ❖ Can be used to
 - Solve a problem
 - Make a decision
 - To give feedback

Using the Six Steps with Teams

- ❖ The L should stay out of the details, keep group focused on solutions
- ❖ Structure Team's thinking on how they communicate and perform
- ❖ It's like parallel processing
 - How 2 computers work twice as fast by working together
 - Each does a different part of the process
- ❖ The Team must do the thinking, not the Leader.

- ❖ Give positive feedback
- ❖ Make them stretch
- ❖ Clarify

Switch- How to Change Things when Change is Hard.

Chip Heath & Dan Heath, 2010

People resist change. In order to help them to accept and then do something about it, two factors need to be addressed; their emotional side (the Elephant) and the logical side (the Rider).

The Rider holds the reins and *seems* to be the leader. However, if the emotions take control, the Elephant is in control.

The Elephant looks for immediate gratification. Sometimes the Rider can't keep the Elephant focused long enough

The Rider can think long term. The Rider can over analyze and then do nothing because they are paralyzed.

To change, we must disrupt our normal pattern of behavior and build new muscle memory which for some people can be mentally exhausting.

In order to change, the following must happen (according to Heaths).

1. Direct the Rider- provide crystal clear clarity as it dissolves resistance. Ambiguity will prevent positive change.
 - ❖ Find the bright spots – show the Rider proof that the plan can and has worked. Big problems usually need smaller solutions.
 - ❖ Script the change. Know exactly what needs to be done.
 - Create a visual- postcard destination. Provides the Rider with the destination clarity and the Elephant why the journey is worthwhile.
2. Motivate the Elephant-
 - ❖ Find the feeling or engage the emotions.
 - See / feel / change
 - ❖ Grow your people. Change will only happen if you let people to make the change. It doesn't happen on its own.
 - Shrink the change. Helps the Rider and Elephant- baby steps. Early successes in the journey fuels hope!
3. Shape the Path-
 - ❖ Tweak the environment so that Rider and Elephant will lead to change.
 - ❖ Rally the herd. Get as many people involved who believe as possible to create momentum and lighten the burden.
 - ❖ Build the right habits and create positive action triggers.

Keep the switch going. The long journey begins with a single step.

Things are always hard before they become easy.

Overcoming obstacles that prevent change

1. People don't see the need to change.
2. People resist when we have always done it this way before.
3. Instead of doing something, we get bogged down in analysis.
4. The environment has changed so we need to overcome our old habits.
5. People simply aren't motivated to change.
6. I'll change tomorrow.
7. People keep saying it will never work.
8. I know what I should be doing but I'm not doing it.
9. You don't know my people, they absolutely hate change.
10. People get excited at first. We then hit rough patches and lose momentum.
11. Its just too much.
12. Everyone seems to agree we need to change but nothings happening.

The Parent Care Conversation

Dan Taylor. Read April 2007

6 strategies for dealing with emotional and financial challenges of aging parents

- ❖ Provides excellent tips on how to have the conversation with your parents. It is not an easy conversation as it can be emotional and may deal with areas that parents do not wish to discuss.
- ❖ Provides Reality Checks. Taylor lists the myths of an issue and what is reality.

Chapter 1- Excuses

- ❖ There are always reasons not to have the conversation. If you put it off, it may be too late.
- ❖ Taylor lists the nine most common excuses.

Chapter 2- The Hear and Now Listening System

- ❖ We tend not to actively listen. Because this is such an emotional issue, we are too careful about what we say. However, we need to know how our conversation would be interpreted
- ❖ The CARE Hear and now
 - Challenges- any change is an obstacle. The focus should be on what the parent *wants* to happen. If they talk about their fears of the future and to anticipate inevitable changes rather than insurmountable obstacles, the conversation becomes easier for both sides.
 - Alternatives- Get them to focus on what they *can* do instead of what they will not do, this will help. This approach generally generates positive energy. As they understand the more alternatives to a perceived challenge, they will gain more confidence.
 - Resources- They have resources at their disposal they do not realize. Again, this discovery will increase confidence.
 - Experience- the last step is to lay out a series of outcomes. The key is to get them to visualize the experience they want to have.
- ❖ Tips on “having the conversation”
 - Work on your mind-set
 - Easy does it- Start with high level and gradually work to detail level
 - Pick a time and place that suits the conversation

Chapter 3- The Big Picture Conversation (strategy 1)

- ❖ Some parents want to get into this conversation but don't know how
- ❖ Most financial planners do not get into emotional side of retirement. Focus on financial planning side.
- ❖ 10 big picture items
 - How do we talk about this without kids feeling responsible for us?
 - How do we get children to work together (instead of fighting)?
 - How do we downsize without giving up everything?
 - How can we prepare when we do not understand the process?
 - How do we simplify our affairs so kids can step in?
 - How do we stay independent without being a danger to ourselves?
 - How do we make sure we do not end up alone & forgotten?
 - What if we do not have enough money?
 - How do we avoid alienating rest of the children by picking out just one to carry out our wishes?
 - Can't we just die so our kids will just have to bury us?
- ❖ These conversations are about parents feelings / fears- not about you.

Chapter 4- The Money Conversation (s2)

- ❖ Appearances can be deceiving. You need to have the conversation to help your parents plan their options.
- ❖ You need to help them develop money planning strategies
- ❖ Easy money- assets that can be easily accessible
 - Hard money- not easily accessible.
 - Children need to know both
- ❖ Need to know income / resources situation

Chapter 5- The Property Conversation- (s3)

- ❖ For some parents, they don't decide because they can't decide
- ❖ Some property is sentimental. Some have hard time picking between children.
- ❖ Need to start a plan now when you are able to do so.
- ❖ Hint- make an inventory of items and where they are

Chapter 6- The House Conversation (s4)

- ❖ As women outlive men, its good to know where mom wants to live after dad is gone.
- ❖ Some parents don't want to leave because of sentimental reason, event though the house is crumbling around them or don't want the fuss of selling and finding a suitable replacement

Chapter 7- The Personal Care Conversation (s5)

- ❖ Many parents do not want to admit that they can not take care of themselves.
- ❖ Fear the thought of having to move somewhere else. The process can be overwhelming

Chapter 8- The Legacy Conversation (s6)

- ❖ How do your parents view themselves and their lives?
- ❖ How do your parents want you to remember them?
- ❖ How do your parents want to be remembered?
- ❖ What do they want others to remember them for?

Chapter 9- Executing essential legal documents & strategies

- ❖ Critical to know where the documents are and what is to be implemented & how.

Chapter 10- Staying on Top of Things

- ❖ This is a work in progress, not an event.
- ❖ Need to review original strategies to see what has changed and what parts of the plan need to change accordingly

The Path- Creating Your Mission Statement for Work and for Life
Laurie Beth Jones- 1996. Read April 2004

3 Elements of a Mission Statement

1. Should be no longer than a sentence long
2. Should be easily understood by a 12 year old.
3. Can be recited by memory at gun point.

11 False Assumptions

1. My job is my mission
 2. My role is my mission
 3. My To Do List is my mission
 4. I am not currently living my mission
 5. I am not important enough to have a mission
 6. My mission has to grand or help a lot of people
 7. A mission must be full of suffering
 8. My mission must be the same as my peers
 9. Geography is destiny
 10. What I am doing is as close I can get to real mission
 11. Life is random. Even I was an accident
- People cannot find their missions until they know themselves. What we think about ourselves is reflected in everything we say or do – in our work, our surroundings, our family life and our service to others. Therefore it is important to take the time to get a clearer picture of who we really think we are.
 - How you view yourself is how others, also, will see and treat you.
 - “Nothing affects the environment of a child as much as the un-lived life of a parent.”
Carl Jung
 - Search for your Unique Selling Point (USP). What makes you unique?
What are your gifts? Are you using them?
 - Your Passion is your Power! What do you stand for? Principle, cause, value or purpose you would defend to the death? You must have a clearly defined territory of responsibility

Unsuccessful M.S.

1. They are uninspiring
2. They are for the benefit of one person only
3. They are unintelligible by outsiders
4. They are full of trite or ordinary phrases.

The Power of Full Engagement
 Jim Loehr / Tony Schwartz- 2003
 July 2006

Chapter 1- Engaging Energy not Time

- ❖ Energy, not time, is our most precious resource
- ❖ Performance, health and happiness are grounded in the skillful management of energy
- ❖ Leaders are stewards of organizational energy
- ❖ To be fully engaged, we must be energized:
 - Physically
 - Emotionally
 - Mentally
 - Spiritually
- ❖ Less than 30% of workers are fully engaged

<u>Old Paradigm</u>	<u>New Paradigm</u>
❖ Manage time	❖ Manage energy
❖ Avoid stress	❖ Seek stress
❖ Life is a marathon	❖ Life is a series of sprints
❖ Down time is a marathon	❖ Down time is productive time
❖ Rewards fuel performance	❖ Purpose fuels performance
❖ Self-discipline rules	❖ Rituals rule
❖ Power of positive thinking	❖ Power of full engagement

- ❖ Human beings are complex energy systems. Full engagement is not one dimensional
- ❖ #1- All four are required, none is sufficient by itself and each influences the others
- ❖ Physical is measured in terms of quantity- low to high
- ❖ Emotional capacity in quality- negative to positive

<u>High Negative</u> Angry Fearful Anxious Defensive Resentful	<u>High Positive</u> Invigorated Confident Challenged Joyful Connected
<u>Low negative</u> Depressed Exhausted Burned out Hopeless Defeated	<u>Low Positive</u> Relaxed Mellow Peaceful Tranquil Serene

- ❖ #2- Because energy capacity diminishes with overuse and underuse, energy must be balanced with energy expenditure and energy renewal

- ❖ #3- To build capacity, we must push our limits, training in the same systematic ways athletes do
- ❖ #4- Positive energy rituals, are key to full engagement and sustained high performance

Chapter 2- Disengaged

- ❖ Physical is fundamental- eating habits, physical fitness, sleep
- ❖ If these are not positively maintained, we start running on empty
- ❖ This affects our ability to concentrate, our energy levels-
 - Our relationships with family and those close to us
- ❖ Low physical energy affects our ability to focus, we lose sight of what is really important in our lives

Chapter 3- High Performance

- ❖ Energy is simply the capacity to do work. Our most fundamental need is our ability to spend and recover energy.
- ❖ We need energy to perform and to recover as well.
- ❖ Over training and under training have performance consequences
- ❖ Balancing stress and recovery is critical, not just in competitive sports, but in all facets of our lives
- ❖ When we expend energy, we draw down our reservoir. When we recover, we fill it back up.
- ❖ Too much expenditure leads to burnout and breakdown
- ❖ Too much recovery leads to atrophy and weakness
- ❖ Above applies to physical energy, same concept applies to other energy sources
- ❖ Emotional depth and resilience depend on active engagement with others and with our own feelings
- ❖ Mental acuity diminishes in the absence of intellectual challenges
- ❖ Spiritual energy capacity depends on our ability to revisit our values and holding ourselves accountable to them
- ❖ Nature has a pulse, rhythm between activity and rest
- ❖ When we don't recover, toxins in our body build up. Without recovery, the toxin build up leads to our body breaking down
- ❖ Recovery at work entails our ability to disengage or set limits or time periods when to push
- ❖ Recovery time must be build in personally or organizationally as our world is hostile to rest- do more, squeeze things in, at the cost of our personal lives
- ❖ Some people are addicted to the rush from stress to the point where they can't relax and this often leads to pre-mature death
- ❖ Expanding capacity requires a willingness to endure short term discomfort. We have experienced the high of stretching our limits. This is not sustainable. At the same time, we must step outside of our comfort zone to grow. This applies to both expenditure and recovery.

Chapter 4- Physical Energy

- ❖ Physical energy is our fundamental source of fuel. Breathing and eating
- ❖ Most taking breathing for granted. It is a powerful tool for summoning energy and for relaxation. Deep and rhythmic breathing is a source of energy. Exhaling longer than taking your breath allows you to relax.
- ❖ What we eat and when we eat allows us to maximize our energy capacity
- ❖ Too much time between meals and then over compensating for it (over eating) has a negative affect. Know your rhythm!
- ❖ Sleep is the most important source of recovery. Insufficient amounts affect our strength, energy levels, mental focus and concentration. Know your rhythm.
- ❖ Interval training is a means which we build more energy capacity and tolerate more stress but also to reach our body to recover more efficiently.
- ❖ We need a recovery break every 90 to 120 minutes.

Chapter 5- Emotional Energy

- ❖ Physical energy is the raw fuel for igniting our emotional skills
- ❖ We must exercise our emotional muscles as regularly as we do our physical muscles
- ❖ These muscles are:
 - Self-confidence
 - Self-control
 - Social skills
 - Empathy
 - Patience
 - Openness
 - Trust
- ❖ Negative emotions (especially anger and depression) drain our energy and as leaders are infectious
- ❖ Prolonged negative emotions lead to stress and affect our health
- ❖ Ways to recharge emotional energy are activities that are fulfilling, enjoyable and affirming to the individual
- ❖ Positive emotion also effectively fuels individual high performance and has an impact on organizational performance (collective performance)
- ❖ Positive relationships can be a source of positive emotional renewal
- ❖ Expanding emotional capacity is important as often demands overwhelm our ability to respond to stuff. People have a threshold. Best way to build your emotional muscle is to push you limit and then recover

Chapter 6- Mental Energy

- ❖ Physical energy is also the fuel for mental energy- ability to concentrate on the tasks at hand
- ❖ We need to be able to concentrate as we move from broad to narrow, internal to external
- ❖ Realistic optimism is also paramount

- ❖ In order to maintain balance between expending energy and recovery energy, we must intermittently change mental channels
- ❖ Physical, emotional and mental energy all feed off one another. Insufficient sleep or poor fitness makes it more difficult for us to concentrate. Anxiety, frustration and anger interferes with focus and optimism, especially in face of high demands
- ❖ Thinking requires a great deal of energy. The brain represents 2% of our body weight yet consumes 25% of our oxygen
- ❖ In order to recover, we must give our conscious, thinking mind a rest
- ❖ One can do this by taking a break or physical exercise
- ❖ Sometimes our best ideas or most creative thoughts come when we are “in the shower”, “resting in bed” or “walking the dog” – not actively seeking solutions
- ❖ Creativity happens in two stages
 - Step 1- information is gathered in a step by step way from multiple sources
 - Verification or analyzing is final stage
 - Insight (initial inspiration), incubation (mulling over ideas) and illumination (breakthrough) happens when we are not consciously looking for solutions
- ❖ Plasticity of the brain- moderate exercise increase our cognitive skills / capacity
- ❖ Continuing to challenge the brain allows us to protect against age-related mental decline

Chapter 7 – Spiritual Energy

- ❖ The quantity of energy that we expend is a reflection of our physical energy. Our motivation to spend what we have is a reflection of our spiritual energy
- ❖ Fundamentally, spiritual energy is a unique force for all dimensions of our lives especially motivation, perseverance and direction
- ❖ Spiritual need not be religious but rather our connection to our deeply held set of values
- ❖ Anything that ignites the human spirit serves to drive full engagement and to maximize our mission
- ❖ The key spiritual muscle is character- the courage and conviction to live by our values even in the face of personal hardship. Other spiritual muscles are passion, commitment, integrity and honesty.
- ❖ It is sustained by the balance of commitment to others and self-care
- ❖ Often spiritual energy is discovered around tragedy
- ❖ Spiritual energy expenditure and recovery are deeply intertwined and tend to occur simultaneously
- ❖ Service to others helps us feel more connected to our sense of purpose
- ❖ Expanding spiritual energy requires focusing our energy away from ourselves
- ❖ One cannot value others or serve others unless one truly values and serves oneself
- ❖ The energy of human spirit can override severe limits of physical energy

Chapter 8- Defining Purpose

- ❖ The most compelling source of purpose is spiritual as purpose creates a destination and anchor for making significant decisions
- ❖ It is a unique source of energy, power; it fuels focus, direction, passion and perseverance. It becomes powerful when its source moves
 1. from negative to positive
 2. from external to internal
 3. from self to others
- ❖ The opposite is true. Purpose fuelled by deficit narrows our attention and limits our possibilities.
- ❖ Deeply held values fuels the energy on which purpose is built. They define our code of conduct
- ❖ Values hold us to a different standard for managing energy.

Chapter 9- Managing our Energy

- ❖ Facing the truth about the gap between who we want to be and who we really are is never easy. We have self-deception. We need to erase the smoke and mirrors.

The range of what we think and do
Is limited by what we fail to notice
And because we fail to notice
That we fail to notice
There is little we can do
To change
Until we notice
How failing to notice
Shapes our thoughts and deeds.

- ❖ Denial is a form of disengagement. It means shutting down a part of us. Denial also requires energy, which is no longer available for productive activities
- ❖ Facing the truth allows us an opportunity to understand and then address negative feelings rather than acting them out.
- ❖ Rationalizing behavior uses up energy and is not being truthful to ourselves and therefore to others.

Chapter 10- The Power of Positive Rituals

- ❖ Positive energy rituals are powerful because they:
 - Help us to ensure we effectively manage our energy
 - Reduce the need on our limited conscious will
 - They are a powerful means by which we translate our values and priorities into action.
- ❖ The bigger the storm, the more inclined we are to revert to our survival habits, and more important positive rituals become.
- ❖ The sustaining power of rituals comes from the fact they conserve energy. (such as brushing our teeth, saying goodbye to our family, etc)
- ❖ Much like weight training, one can strategically build the muscle of self-control.
- ❖ Exercise self-control, empathy or patience past normal limits and then allow for rest / recovery.
- ❖ As we exercise on a regular basis, these activities become rituals. The more we maintain existing rituals and gradually add new rituals, the stronger the body / mind becomes.
- ❖ Rituals help create structure in our lives as we are creates of habit.
- ❖ Timing and specificity to rituals key in developing them.
- ❖ Negative framed intentions (I won't overeat, I will not lose my patience) drain energy and deplete our limited stores of will and discipline. Not doing something requires self-control. In these cases, it is best to substitute this behavior with more positive one, like eating fruit.
- ❖ When change is required, incremental change is best to initiate and sustain.

Sustained High Performance

<u>Fully Engaged</u>	
Physically Energized	Mentally focused
Emotionally connected	Spiritually aligned

<u>Energy Management</u>
Managing Capacity: the quantity, quality, focus and force of energy that is available to perform the ritual in the storm.

<u>Primary Capacities / Big Muscles</u>			
<i>Physical</i>	<i>Emotional</i>	<i>Mental</i>	<i>Spiritual</i>
Heart & lungs	Self-confidence	Focus	Character
Abdominals	Self-regulation	Time management	Integrity
Shoulders / back	Interpersonal effectiveness	Realistic optimism	Passion / commitment
Legs	Empathy / caring	Creativity	Service to others
Arms			

<u>Support habits / small muscles</u>			
<i>Physical</i>	<i>Emotional</i>	<i>Mental</i>	<i>Spiritual</i>
Sleep	Patience	Visualization	Honesty
Exercise	Openness	Positive self-talk	Integrity
Diet	Trust	Positive attitude	Courage
Hydration	Enjoyment	Mental preparation	Persistence

The Speed of Trust- Stephen Covey (Jr.)

February 2007

- ❖ In our global reality, trust is more career critical than it has ever been.
- ❖ Also, in the global reality, speed to market is the ultimate competitive weapon. Low trust creates friction and slows everything down. Trust, on the other hand, increases speed, build brand loyalty and in essence is an enabler.

The One Thing that changes Everything

- ❖ Trust is critical to any relationship whether it is work related or dealing with family.
- ❖ Speed happens when people trust each other- Edward Marshall
- ❖ If you're not fast, you're dead. Jack Welch
- ❖ Trust issues affect everyone.
- ❖ Economics of trust. Low trust decreases speed and increases costs. High trust increases speed and decreases cost.
- ❖ The Trust tax occurs when we do something that erodes the trust people have in us or people discount the trust they have in us by something we have said or done to them in a negative way.
- ❖ Trust dividend is the opposite. It is like a performance multiplier. Trust is automatically increased because you are consistent in your actions.
- ❖ Some realities:
 - Trust is a function of both character (including integrity) and competence.
 - Trust can be created and destroyed.
 - Though difficult, in most cases lost trust can be restored.

You can do something about this.

- ❖ 5 waves of trust are:
 1. Self Trust- confidence in ourselves, keeping commitments
 2. Relationship Trust- how we establish and increase trust accounts with others
 3. Organizational Trust- how leaders generate / don't generate trust
 4. Market Trust- creating / building your marketing brand
 5. Societal Trust- creating value for others
- ❖ Restoring trust. "The best time to plant a tree was twenty years ago. The next best time is today." Chinese proverb
- ❖ See, speak, and behave. - All part of cycle in creating and maintaining trust.
- ❖ Listen first.

The first wave of Self Trust- Credibility

- ❖ 4 cores – Integrity, Intent, Capabilities and Results
- ❖ Credibility questionnaire- pages 50 - 53

- ❖ Integrity is like the roots of a tree- you cannot see it but know it is there. Fundamental to trust.
 - Congruence is integral to integrity. Do your actions match your words & values?
 - Humility is about putting one's ego aside and being more concerned about others.
 - Courage is about doing the right thing, which sometimes can be difficult.
- ❖ How to increase your integrity
 1. Make and keep commitments to yourself
 2. Stand for something
 3. Be open
- ❖ Intent- what's your agenda?
 - Your intent and the other parties may not be congruent
 - We judge ourselves by intent by judge others by their actions
 - Conversely, others will judge us not by our intent but by OUR actions
- ❖ How to improve intent?
 - Must be genuine and consistent with past behaviors
 - To be truly effective, should have other's interests at heart if you are trying to build trust
- ❖ Capabilities- are you relevant?
 - You must be competent or you must be seen by those following you as competent. People may like you but may not trust you based on your perceived incompetence.
 - Capabilities consist of talents, attitudes, skills, knowledge and style
- ❖ You can increase your capability by focusing on your strengths (and making your weaknesses irrelevant by delegating) and knowing where you are going.
- ❖ Results- what is your track record? Past, present and future.
- ❖ Need to ask two questions. What results am I getting? How am I getting the results?
 - Sharing credit for results build trust.

2nd wave – Relationship Trust- Principle of Behavior

- ❖ 13 behaviors are- talk straight, demonstrate respect, create transparency, right wrongs, show loyalty, deliver results, get better, confront reality, clarify expectations, practice accountability, listen first, keep commitments, extend trust
- ❖ Building trust accounts- what constitutes a “deposit” to one person may not to another.
- ❖ Withdrawals are typically larger than deposits.
- ❖ The fastest way to build trusts is to stop making withdrawals.
- ❖ Each relationship has 2 trust accounts- the intent and the result.
- ❖ Make it personal.

- ❖ Create an action plan based on the 13 behaviors.

3rd wave- Organizational Trust- The Principal of Alignment

- ❖ Clues are- clear & concise policies, leaders trusting those around them, vision and actions align, enhanced innovation, accelerated growth, strong partnering, heightened loyalty
- ❖ Organizations can be rated by the 13 behaviors

4th wave- Market Trust- Principal of Reputation

- ❖ Branding matters
- ❖ Your brand must have integrity, demonstrate good intent, demonstrate capabilities and strong track record (results)

5th wave- Societal Trust- Principal of Contribution

- ❖ The intent to create value instead of destroying, to give back instead of taking
- ❖ Business people giving back- Bill Gates, Oprah Winfrey

Inspiring Trust

- ❖ Creating the foundation upon which successful enterprises and relationships stand
 - First job of a leader
 - Differentiator between a leader and a manager

Smart Trust matrix

<u>Gullibility</u>	<u>Judgment</u>
High propensity / low analysis	High propensity / high analysis
Low propensity / low analysis	Low propensity, high analysis
<u>Indecision</u>	<u>Suspicion</u>

- ❖ Why trusted managers never become leaders
 - Do not know how to extend trust
 - Delegate but micromanage
 - Operate in zone of suspicion
 - Delegation is intellectual, trusting is visceral (felt)
- ❖ How do you develop trust?
 - Start with yourself and your own credibility
 - Inspire trust from / with others – 13 behaviors
- ❖ Restoring Trust when it has been lost
 - Depending on circumstances, you may not be Trusted again
 - Rebuild your credibility and behave in ways that inspire trust
 - One of the most difficult areas is trust in ourselves. You must be honest with yourself, realistic in expectations, right wrongs, confront reality, practice accountability.

- ❖ When others have lost your Trust
 - Don't be too quick to judge
 - Do be quick to forgive
 - "The weak can never forgive. Forgiveness is the attribute of the strong. – Mahatma Ghandi
 - Prioritize restoring trust
 - Broken trust- a beginning

- ❖ A propensity to trust
 - Someone may have believed in you when no one else did. Generally, this has a profound affect or difference in our lives.
 - Believing in people speaks volumes about your role as a leader.
 - Most people respond well to trust (both at work and at home).
 - We were born with a propensity to trust (as newborns or children, we have no choice as we can not fend for ourselves)
 - If you truly trust others, they in turn will trust you.

The Team Coach

By Donna Deepröse, 1995

The following is a review of the book The Team Coach. While it is geared towards the manufacturing industry and not the financial services industry, there are some areas of commonality.

The following is a recap of the main areas discussed.

A self-directed work group is a small group who shares responsibilities for a block of work. Typically the team has the responsibility and authority to plan, schedule and assign work and make / implement decisions related to production and personnel.

The Team Revolution

- With the flattening of management structures and less management to oversee work groups, SDWT (self-directed work teams) have evolved, predominantly in the manufacturing / production industries.
- If workers are self-managing, the team manager becomes responsible for the transition to the SDWT, providing leadership, resources and training.

The Impact of Teams

- SDWT need nurturing, coaching, encouragement and support that paves their way to clients and customers, suppliers and upper management.
- This becomes the responsibility of the team coach.

What Teams do

New Teams	Maturing Teams	Mature Teams
Schedule work assignments	Manage budgets	Determine overtime
Manage vacation schedules	Contact customers	Conduct performance appraisals
Keep attendance	Communicate with vendors	Discipline team members
Solve problems	Participate in planning	
Monitor results	Participate in goal setting	
Schedule training	Participate in hiring	

What Teams Need

- Before teams become self-managed, they need tools that management previously did for them. This includes skill and knowledge, access to people and information and self-confidence that they can solve problems.
- They need someone to run interference with upper management.

What Coaches Do

1. Coaches build teams
2. Provide vision
3. Transfer management responsibilities to teams
4. Facilitate external relationships
5. Provide resources
6. Plan longer term
7. Support career development
8. Participate in their own teams

Transition role of the Coach

- Many team coaches make the transition from the supervisory role. Their new role entails the following:
 - Teach members to understand the business
 - Participate and teach conflict resolution
 - Help determine training and education requirements
 - Practices staying neutral and fosters two-way communication
 - Transfer specialized knowledge
 - Teaches teams to prioritize goals
 - Teaches teams to share skills, information, accountability and responsibility
 - Teaches behaviors and consequences
 - Provides recommendations

Required Skills

- To become a good team coach, you need the following skills:
 - Listening
 - Communicating
 - Advocating
 - Team building
 - Facilitates decision making
 - Training
 - Educating
 - Mentoring

Training for Team Coaches

- People who have become team coaches have received their own training in:
 - Team building
 - Problem solving
 - Managing conflict
 - Listening
 - Giving feedback

Running a Business

- SDWT run their own business. In order to become successful, they must do the following.
 - Set team goals and guiding mission statements
 - Understand their reason for being, what are their critical services
 - What contributions can individual team members make that positively impacts the business plan
- The Team Coach helps the teams through these processes.

Recognizing and Rewarding Performance

- Good SDWTs pay particular attention to performance appraisal and recognition
- Good team coaches ensure performance and recognition is a blend of team and individual performance and goals
- They also ensure that these areas are treated fairly

Vital Friends

Tom Rath

<p>Builder</p>	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ Great motivators, always pushing you ✓ Continually invest in your development-genuinely want you to succeed ✓ Generous with their time, they help you see your strengths ✓ They will not compete with you. ✓ When you want to think about how you can do well, talk to a builder. 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Help them understand where you need the extra push ✓ When seeking advice, bring your strength into the talk ✓ They may not be good connectors but likely a good coach ✓ Share your successes 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Notice when your friends learn & grow ✓ Ask them to identify their strengths ✓ Help them expand their ideas for growth
<p>Champion</p>	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ They stand up for you, even when you aren't there. ✓ They accept what you say without judging you ✓ They thrive on your accomplishments 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Help them understand what their role can be ✓ Let them know their words find you. ✓ When you make a mistake, share the problem. 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Ask your friends about their accomplishments ✓ Notice when your friend have successes and celebrate them ✓ Understand what they don't share with others and maintain their confidence in you.
<p>Collaborator</p>	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ A friend with similar interests ✓ Share a passion, belong to the same club ✓ Likely you will have similar ambitions 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Send them articles of interest ✓ Spend time with them ✓ While you may spend limited time, acknowledge time is appreciated 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Think of ways to create traditional activities ✓ Surprise people with things you know would interest them
<p>Companion</p>	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ Always there for 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Safe to talk 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Try not to keep

	<p>you, you share an unbreakable bond</p> <ul style="list-style-type: none"> ✓ Will anticipate what you are thinking ✓ Will literally put their life on the line for you 	<p>about issues that matter most in life</p> <ul style="list-style-type: none"> ✓ Create a safe environment for them to be themselves 	<p>secrets as it erodes trust</p>
Connector	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ A bridge builder who helps you get what You want ✓ People you socialize with ✓ They point you in the right direction- hooking up with someone you need 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Person to turn to if you are switching jobs ✓ Let them know your future plans 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Let your friends know they can use you as a resource ✓ Think of people you know who should meet
Energizer	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ Fun friends who always give you a boost ✓ Can pick up when you are down ✓ You likely will laugh more in their presence 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Encourage them to tell stories ✓ Focus on the positive ✓ Contact them when you are feeling down or going through a rough period 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Focus your friends on the positive aspects of their lives ✓ Give people feedback when they need it
Mind Opener	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ Expand your horizons, encourage you to embrace new ideas or opportunities ✓ Challenge you to think in innovative ways ✓ When you are with one, you may express ideas out loud, even controversial ones 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Talk to them if you are at an impasse with someone ✓ Think about what they say. Don't act on it right away ✓ Ask them to play devil's advocate 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Listen for extremes in friend's language. ✓ Help friends ask questions ✓ Use actual experiences to reinforce your point
Navigators	<p>Who are they?</p> <ul style="list-style-type: none"> ✓ Give you advice and point you in the right direction ✓ Will walk you 	<p>Strengthening:</p> <ul style="list-style-type: none"> ✓ Use them before you make a major decision ✓ Ask them about 	<p>If you are:</p> <ul style="list-style-type: none"> ✓ Focus people on the big picture ✓ Be a sounding board

	through pros and cons ✓ Help you see positive future while keeping you grounded	their own bumps ✓ Seek their advice through sticky situations	✓ Help friends see the different options and repercussions of each
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