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## Embracing The Path: A Story Of Leadership, Transformation, And Adventure

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Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania.

Advisor: Stephen G. Hart

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# Embracing The Path: A Story Of Leadership, Transformation, And Adventure

## Abstract

This capstone retells a journey of transformation through self-realization and personal development, made possible through the collective learning experiences and inspirations provided during my course of study in the Organizational Dynamics program at the University of Pennsylvania. The concepts are purposefully woven together in a story format to reinforce the importance of balance across multiple versions of self, highlighting personal development experiences, adventures, and the resultant growth as a person and leader. The paper focuses on topics of work-life balance and self-awareness in exploration of their usefulness in leader development, orchestrating change management initiatives, and improving overall effectiveness in organizations.

This paper intentionally unfolds as an introspective narrative sharing reflections and applications of leadership techniques as a tool to foster a deeper connection between organizations and the people that thrive within them. This paper also seeks to serve as inspiration for others contemplating a journey of personal transformation.

## Keywords

self-realization, personal development, personal transformation

## Disciplines

Organizational Behavior and Theory

## Comments

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EMBRACING THE PATH:  
A STORY OF LEADERSHIP, TRANSFORMATION, AND ADVENTURE

by

Zachary S. Davis

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College of Liberal and Professional Studies  
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University of Pennsylvania

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2020

EMBRACING THE PATH:  
A STORY OF LEADERSHIP, TRANSFORMATION, AND ADVENTURE

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## ABSTRACT

This capstone retells a journey of transformation through self-realization and personal development, made possible through the collective learning experiences and inspirations provided during my course of study in the Organizational Dynamics program at the University of Pennsylvania. The concepts are purposefully woven together in a story format to reinforce the importance of balance across multiple versions of self, highlighting personal development experiences, adventures, and the resultant growth as a person and leader. The paper focuses on topics of work-life balance and self-awareness in exploration of their usefulness in leader development, orchestrating change management initiatives, and improving overall effectiveness in organizations.

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Maya Angelou said “People will forget what you said, people will forget what you did, but people will never forget how you made them feel.” I hope that I may repay my gratitude to the many that guided me along this journey.

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## Introduction

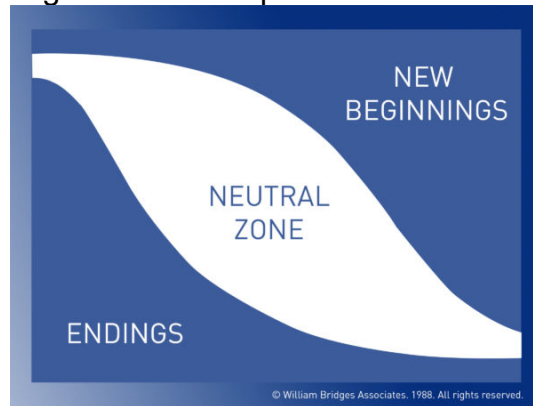
The story you are about to read is a collection of experiences that have informed and influenced a personal transformational journey. Expect to be immersed in honest dialogue and emotions, reflective introspection, and scholarly application of concepts and tools discovered during my journey as a student in the Organizational Dynamics program at the University of Pennsylvania.

During my time as a student I experienced tremendous personal growth. The concepts and lessons I learned affected my personal and professional development, and I will reference these in subtle and deliberate ways throughout. This academic pursuit was not purely in a vacuum. My scholastic self was an active participant alongside my identities as a sales executive, leader, father, runner, husband, among others. The spectrum of emotions, applied learnings, progress, failures – all are woven together between my interactions of self in a story of transformation.

Progress on this journey is not always linear. There are stops, starts, steps forward, steps backward, sideways movements – each interacting with the others. One thing will hopefully become clear – I am a different and holistically better person having experienced these transitions. William Bridges (2009) presents a model for transition to begin to unpack this journey, and suggests that “because transition is a process by which people unplug from an old world and plug into a new world, we can say that transition starts with an ending and

finishes with a beginning” (p5) The area in between, the “neutral zone” as displayed in Figure 1 below, is where the real transformation occurs.

Figure 1 – The 3 phases of transition



The following collection of ideas, reflections, and emotions center on a major change event in my life. The story focuses on my navigational trials and triumphs through my neutral zone.

I am a storyteller by nature, and I hope to enable the reader to imagine new perspectives through the recounting of my journey, inspired in part by a suggestion from Stephen Denning (2011) that “abstract analysis is easier to understand when seen through the lens of a well-chosen story.” (p11) Much like the illustration above, a path through the woods, or a free-flowing mountain stream, I chose to present this collection to the reader in a circuitous personal narrative providing analysis and commentary on lessons learned, and in the hopes that something may resonate to inspire action in others. This is my story.

## **The Mountains Are Calling**

In 2017 I registered to run the Golden Leaf Half Marathon in Aspen, Colorado with a number of longtime college friends. The training was fairly intensive, spanning many weeks in advance – and the trail race was an intimidating one. Over 1000' of vertical elevation gain, the initial two-mile stretch ascended the main ski hill at Aspen Snowmass, followed by a ridgeline run down into the town of Aspen. My job at the time afforded me the ability to travel to nearby Denver almost as frequently as I wanted/needed for the role. I had a few teams based near the city, and at least once a quarter I would add on a vacation day to actually enjoy the outdoors while I was there, and this trip was no different.

The plan seemed bulletproof. I had to work in Denver after the weekend spent in Aspen, and planned to report on Tuesday after my wife flew back home Monday night. At the onset, it seemed like the perfect plan. Run the race, spend the weekend in a beautiful town with great friends, then head back to Denver to get some work done. Personal and professional benefits, with some costs covered by the nature of my corporate travel. Except it got off on the wrong foot altogether, and I struggled at times to enjoy myself amidst the work pressures.

Earlier in the work week it was announced that we would have a business review with our Senior Vice President (SVP) – a big deal with potentially weighty consequences, considering our business unit was struggling to produce the desired sales results. It was decided that I would present at the end of the call, allowing the three larger regions to cover detail up front and saving the most complicated division (mine) for last. My teams were in the midst of a changing

business plan, so the sequence made sense. Unfortunately, the call was scheduled for a day I had planned to be out of the office. As more details unfolded it seemed less impactful on my prior plans, the call would only be 90 minutes (and I planned to attend during a three-hour drive) so things appeared to align in my favor. Preparation calls overtook the calendar – perfection in delivery was essential to the success of the review, facts memorized, stories synchronized. The format of the information received almost as much attention as the results themselves, as often happened with these performance check-ins, creating a paralyzing feeling amongst the team. Prep call Wednesday, multiple prep calls Thursday, prep calls again on Friday morning ... all complicated by my personal travel schedule and subsequent delayed time zone. After more time spent than any of us had hoped in preparation of this call, the time was locked, we were prepared, and I headed west to rendezvous with our friends in Breckenridge. From there we planned to caravan on a scenic drive over remote mountain passes to our ultimate destination of Aspen.

The call started 30 minutes into the ride, without a hitch. Our mobile conferencing platform worked great, and as a passenger I was able to follow along with the presentation on my tablet, with my audio connection no different than in my home office. Then, disaster struck 15 minutes into the call. As we pulled out of a small town and descended into a valley in the San Juan mountain range the cellular service went completely out. No one had service in our caravan, despite three different providers and multiple device models. The signal simply did not exist, except for short stretches when we would peek out from

behind a mountain and I could rejoin my meeting for a few minutes at a time. I managed to get a message out to a work colleague, and based on my travel calculations by the end of the scheduled call I expected to be back inside a coverage area; until then, my connection was touch-and-go. Those next 40 minutes were extremely stressful as I anxiously watched the arrival time on the GPS, as if the more intently I stared the faster we might arrive. It was grueling, all the while we were driving through spectacularly beautiful mountain passes with aspen leaves ablaze in shades of fiery orange and yellow on the hillsides, as I watched the minutes tick away until I could rejoin the meeting again.

Five minutes ahead of schedule we began our descent into Aspen, and with devices in range I rejoined the call and heard my precursor starting to wrap his section. A huge wave of relief cascaded over me as I ran through my notes again for the hundredth time and readied myself to take center stage. As I waited for my boss to finish his introduction, our SVP said, "I've heard all that I need to, things are going well, we can talk about the final division at another time." The call abruptly ended there, and I was dumbfounded. Then angry, first at him for having me go through all the motions for what turned out to be nothing, then at myself for allowing this to completely consume me over the past few days. It took about two hours for me to let it go; the knot building in my stomach for the next day's race provided a welcome distraction.

The race went off without a hitch on Saturday, then fun and shenanigans ensued through Saturday and Sunday with friends – exactly as planned and as expected. Sunday night nevertheless would prove challenging. Sleep did not

come easy. I was anticipating the long drive back to Denver, along with it came the return to the office on Tuesday. A feeling of dread came over me, and I woke up with it on Monday morning. I couldn't shake it. I did not want to venture into the office. There wasn't one specific thing that stood out, I just didn't want to do it. This was an unfamiliar feeling. I could recount plenty of times I did not want to go to work on a given day, as many can relate, but this was different. I couldn't put my finger on a specific cause, and at the same time the dread was more intense than I previously experienced. I didn't want to feel this way, I didn't like it, and unfortunately it would not be the last time.

Fast-forward, 2018 Aspen was going to be different. I registered for the race again, and I was excited about another chance to prove myself on the tough mountain course. I often run the same races in subsequent years, and improving on my performance is a demand I place on myself. This helps fuel my training leading into it, and provides a sense of affirmation once I finish.<sup>1</sup> Validation of the long hours spent training, the poor weather outings, the early-morning wake-ups, the sore muscles, the planning required to execute a program through culmination – improving my recorded time validated all that activity in my mind.

Starting with the logistics of the trip, I planned better this time around. I flew out early and met with my direct-report leaders in Denver. Budget was tight

<sup>1</sup> Systems theory, specifically ideas expanded by William Torbert (2004), offers a framework to help understand the relationship between feedback, actions taken, and eventual outcomes related to my running. The results of the race provide single-loop feedback, recorded data to measure the output of the activity. Taking it a step further, this feedback informs and advises my strategy for subsequent attempts, a concept Torbert refers to as double-loop feedback, paraphrased as requiring me to transform my structure or strategy, not just amend my behavior, in order to achieve a different desired outcome. Alternately stated, to achieve a faster time I need to do more than simply run faster (single-loop), I need to adjust my training and race day plan to transform my outcome (double-loop): (p18)

so my trip was shorter than usual, but I made sure to book a long, slow, lunch with my leaders. This was a key exercise taken from a sales leadership program we had just launched. The purpose of the long, slow meal is to take time and engage in meaningful conversation, outside of typical work-related topics, as one way to deepen the personal connection between leader and direct report. All of the managers across the business unit were grouped into regional cohorts, to help reinforce the learning and build community outside of the day-to-day interactions, and support each other as leaders. My direct reports would conduct similar meals with their teams, so it was important that I met with them in person to accomplish the goal of deepening our connection, while also providing a frame of reference for them to conduct a similar meal with their teams.<sup>2</sup>

<sup>2</sup> It has always been a priority of mine to be (and to feel) connected with those I work with. Early in my career I struggled with the boundaries of personal vs. professional. I struggled to strike a balance between being friendly, open, being vulnerable while acting as a leader, setting the right example, and maintaining a perceived acceptable level of separation. The struggle in itself is boring, and I engaged in it for longer than I should have. One concept that helped shift my perception is that of managing authenticity – that “people want to be led by someone ‘real’.” Furthermore, it is often

“difficult for leaders to find a balance between expressing their personalities and managing those of the people they aspire to lead or at least influence. Yet the ability to strike that balance – and to preserve one’s authenticity in the process – is precisely what distinguishes great leaders from other executives.” (Goffee & Jones, 2005, p2)

This was one of the first lessons I embraced as a young leader, and my aspirations to be great caused me to change my perception and my outlook, and also modify the way in which I interacted with people. I let them see me, everything - the whole me, instead of trying to erect a façade of what I thought I ‘should’ look like or how a leader ‘should’ distance himself from his direct reports. My passions, my vulnerabilities, my strengths, my non-strengths – all on display.

“Authenticity is not the product of pure manipulation. It accurately reflects aspects of the leader’s inner self, so it can’t be an act. But great leaders seem to know which personality traits they should reveal to whom and when. They are like chameleons, capable of adapting to the demands of the situations they face and the people they lead, yet they do not lose their identities in the process. (p2)”

I am most comfortable as an open book, letting people see everything and decide for themselves; much better than simply putting forth a distilled product. In the above passage, Goffee & Jones suggest that this is accomplished in two ways; first by ensuring that your words are consistent with your deeds, and second by finding common ground with the people you seek to recruit as followers. The long, slow meal would be an opportunity to demonstrate both.



The concept of the long, slow lunch resonated with me, it made sense. I had similar experiences before, but never a meal with co-workers solely dedicated to personal dialogue. Not just small-talk about weather, local sports teams, or kids' homework, but instead meaningful conversations about each other's passions, as much as we were each willing to share with the others. No work chatter. No spin. No hidden agenda to bring the conversation full-circle at some point by connecting threads with the current corporate message on sales performance, and risk potentially undermining the intent of the meal by appearing disingenuous or inauthentic. The idea was to create an environment to enable sharing, which required practicing interactive leadership.<sup>3</sup> There was no secret plan, no intentional teaching moment, no mobile phones, no email – simply conversation for the sake of conversation. The meal lasted over two hours, and was a great experience. My leadership team and I shared an open and honest dialogue, and I felt more connected to them as a result. It almost alleviated the twinge of guilt I felt as the team drove back to the office while I pointed my car west to Breckenridge and my planned weekend off. I learned my lesson from the previous year – work first, then unplug – in the hopes of actually enjoying myself. This plan seemed superior, I headed to the mountains leaving behind work and sleepless nights.

<sup>3</sup> Stephen Denning (2011) offers that “interactive leadership builds on personal integrity and authenticity. Because you can communicate who you are and what you stand for, others come to know you and respect you for that. Because you treat others as ends in themselves, not merely as means to your own ends, people trust you. Because you make your values explicit and act in accord with those values, your values become contagious and others start to share them.” (p270)

Or so I thought. Thursday afternoon during the drive an email arrived in my inbox with an invitation for a call the next day: “Mandatory Attendance – No Delegates”. The audience was Directors and titles above, and so seemed important. That evening I debated the consequences of my absence, Friday after all was a planned day off. I worked hard, I earned the right to use my paid time off and not engage in work for a day. I was frustrated. There was no code that specified when a Director needed to be available, but it was generally understood that as long as one could be reached via mobile device that one could be asked to respond to a work concern, regardless of day or night or planned time off. Not unlike other companies, the culture in sales leadership at my company bordered on boastfulness when people spoke about ‘having’ to work while on vacation. I was in the minority, never one to have too much time to carry over at the end of the year, my time off was sacred. On top of that I was really looking forward to my planned Friday activity – fly fishing on the Blue River in Breckenridge for as many uninterrupted hours as I could muster between sunrise and lunch time. I already worked, now this was my time, and a conference call would most certainly impede those plans.

I was agitated for about 30 seconds, then I remembered the sage practice of a former boss of mine, also a devout fisherman. He often bragged about joining seemingly trivial calls from the stream. Better still, there were times he had to mute himself to land a fish, and they seemed to occur at the least convenient moments on the call (an important pitfall to avoid). Nevertheless, it was a practice he swore by. Seemed like a great plan, work-life balance at its

finest. I made my decision to fish during the call and step aside if there were key infographics or other critical points being shared. After all, what better test of our company's lauded remote collaboration capabilities than attending an important virtual conference from a mountain stream. My mind was made up, the plan for Friday was wading & web conference.

The meeting began the next day at 7AM local time in the mountains, an early departure required to adequately login to the conference, test the reliability of the connection and capabilities, then walk to the stream. Armed with an insulated mug of coffee, fresh tips from the local outfitter, and all my extra layers of clothing needed to combat the 32-degree pre-dawn temperature, I set out for the stream. The leaders got down to business quickly, after the unavoidable 5-minute preamble of attendees checking-in, the roll call of speakers, amidst a handful of apologies for "talking into mute", the real message came through. On the following Monday morning an important company-wide announcement would be released and we needed to be prepared as leaders. The company was offering a voluntary separation package (VSP) to all employees in our business unit.

My gut reaction was a mixture of fear and excitement. This was it – my 'get out of jail free' card. Better than free, PAID. Enough money and benefits to provide a security blanket to pursue the next opportunity. All I had to do was walk away from my professional home and family of almost 15 years. Surely this was too good to be true, the majority of my experiences between my company and my personal compensation throughout my career helped cultivate a hardened

perspective. I empathized with young professional athletes drafted outside of the first-round splendor of lucrative contracts and guaranteed pay structures. I felt much like a middle-rounder, proving myself time and time again to various critics and coaches, but hamstrung by the constraints of a rookie contract, earning less than my performance dictated.<sup>4</sup> In my case it was not a contract to overcome but the struggle with an abysmally low starting salary – as performance improved, responsibilities increased, pay was still somewhat governed by a low entry point on the scale. Personally, my frustration centered less on the monetary component and more the feeling that it created, a seeming lack of respect of my hard work, talents, and impact on the business that always rubbed me the wrong way. This fueled my skepticism, which almost allowed me to dismiss the VSP offer entirely as not what it seemed, therefore perhaps I shouldn't waste my time speculating.<sup>5</sup>

On the contrary, what if I was wrong and this offer was not too good to be true? And why not. It would be irresponsible of me not to look into this. What if I took it? What would I do with the money? Where would I travel first? How would I

<sup>4</sup> There is also an inherent difference between draftees picked within the first and second rounds and those in the third through seventh. Early-round draft picks — largely because of the big investments the teams are making — are much more likely to have their salaries guaranteed (Belzer, 2018)

<sup>5</sup> This disconnection in attitudes towards compensation is not entirely unique, similar concerns have plagued organizations and employees for years. In 1997 United States Navy sailors leaving the USS Benfold expressed dissatisfaction in exit surveys. The primary reason for sailors leaving the Navy was not pay as expected (fifth-most); “the top reason was not being treated with respect or dignity.” (Abrashoff, 2002, p13) Similarly, in 2017 “this idea is reinforced by the fact that 89% of managers believe employees leave organizations for more money, while only 12% of employees believe this. (Mouriño, 2017, p44) Monetary compensation is a factor that is a priority for employees, but not the most important for me personally and many others. The examples span twenty years, reinforcing that organizations continue to struggle with the connection between compensation and overall employee satisfaction.

spend my time off? It had been so long since I had asked myself these questions, since I explored what employment outside the current bubble might look like, that I had no vision. All of a sudden, this choice was not a choice at all. There was no next step, I had no idea what was even possible – I had not allowed myself to think or explore in that way in a long time. All these thoughts raced through my mind, and my head was spinning. And my hands hurt. I was standing at the rear of the car, in the parking lot, and my uncovered hands were now screaming with cold. I hadn't even rigged up my fishing rod. The warmth of the sun crept over the first mountain peak, and I turned my attention to the 5-weight fly rod. I put my phone on speaker (and on mute) and began the process of tying on a double nymph fly rig, then I headed down the gravel path to the stream.

My mind was still so engrossed in the call, and the potential personal implications, that I committed a cardinal sin when fishing for trout in a well-targeted body of water. I walked right up to the water's edge, leaned over, and watched in horror and disgust as the shadows from a dozen large rainbow trout streaked downstream for cover. (Anderson, 1978, p5) Hole spoiled. Call continuing, I weaved my way slowly upstream, careful not to cast another shadow over the water.

I struggled to link my mental and physical energies. Physically present on the stream, but mentally present on the web conference. Throughout my virtual attendance of the meeting, I was amazed at the candor and composure of our senior leaders. The Global President of Sales, and the Executive Director of

Human Resources, both made many careful statements. It was evident that words were purposefully selected, but at the same time they conveyed empathy regarding the things that we as leaders (and as individuals) were likely feeling. They coached as they messaged. Over and over again, we were explicitly instructed to respect the decision our direct reports may make. The VSP was not to be taken lightly, and we were not to influence or sway decisions in any way. We needed to provide impartial counsel and help our people arrive at a decision on their own, not make it for them or sway them. The decision, and the process they were about to undertake, was to be considered deeply personal and not taken lightly. This would be a leadership test for us.

The message was genuine, their approach authentic. It did not come across as a statement made for the sake of compliance, rather as a serious and helpful message from our leaders to help us as leaders navigate through this challenging opportunity. Even more surprising – senior leaders encouraged us to take an honest look for ourselves.<sup>6</sup> This VSP experience would be a test of our abilities to effectively lead and communicate, in addition to the careful execution of the plan laid out by the senior leadership team. As I pored over the message, I thought of the importance of generating a feeling of followership for my leaders. They needed to experience genuine support from me, so that they, in turn, could replicate this approach for their teams, and it was my duty to prepare them.

<sup>6</sup> The approach was similar to a concept Bennis (1996) presents, touting the importance of connecting with an audience. “Leaders are highly focused, that they are able to inspire trust, and that they are purveyors of hope. But followers are more essential to leadership than any of those individual attributes.” (p154) This VSP experience would be a test of our abilities to effectively lead and communicate, in addition to the careful execution of the plan laid out by the senior leadership team.

This was an important waterfall of information, where the delivery and presentation would be critical to the message reaching the ears of all the members of the organization. With my feet immersed in water I found similarity in approach to my other intended activity. In related fashion, Anderson suggests that “the successful fisher must learn to cast well under a variety of difficult conditions and from a variety of awkward and often uncomfortable positions. Additionally, “success will depend on your ability to cast accurately and gracefully where others can’t or won’t.” (Anderson, 1978, p30) Effective messaging and purposeful delivery is paramount to building trust amongst skeptical employees, in the same manner that effective fly presentation and the proper cast is critical to the angler seeking to entice wary trout.

Continuing upstream, at the next hole I picked out the perfect seam where the current flowed behind a few rocks, the sort of idyllic gentle ripple highlighted in countless fishing sources. Often scenic sections also yield trophy pursuits, as outlined in Figure 1.



Figure 1: Stream Tactics.

A vertical cross section of a pool showing where trout are most likely to be found: At the head of the pool where the depth first starts to drop off (A), in the depression in front of the rocks (B), behind and alongside the rocks (C), and in the tail of the pool (D). (Rosenbauer, 2007, p157)

I pulled some slack line off my reel and gently cast the fly forward, applied a quick mend, and watched the nymph drift through the ripples. As it neared the

end of the drift, I lifted the rod tip ever-so-slightly, casting the line behind me to load up and reset. With the forward motion I felt a tug from behind me – TREE. The artfully tied rig was ensnared out of reach in the branches of a young aspen. Two casts, no fish, two flies lost, and now at least a ten-minute ordeal to re-rig and go back at it. Regardless of the beauty or intent of the fly, a poorly executed delivery can spoil all the careful preparation and prove ineffective at catching a fish.

What was supposed to be a leisurely morning of fishing was manifesting as another live metaphor for my current work-life malaise. There I was, on my day off, working. Not fishing, certainly not catching, and not fully present in the activity I wanted to be present in. As I looked at my watch and saw 8:05 AM a sort of panic set in. I only had a few hours to fish and there I was wasting it. Soon the morning would be over and I might not catch anything, and thoughts of wasted time, money, effort, planning all raced through my mind. I wasn't fully working, wasn't fully fishing ... and then I caught myself. This was silly, I thought to myself, of course I am going to catch a fish, and so what if I don't. After all, I'm still knee-deep in a mountain stream in September while most other people on the conference call are huddled around a desk somewhere bathed in fluorescent lighting. Stop being crazy. Re-rig your line, take a deep breath, reset, and enjoy this.

As I slowed down and began to tie new flies on my line, reminding myself to be patient and do it right, I thought back to a calming technique I learned from



a number of United States Marines, “slow is smooth and smooth is fast.”<sup>7</sup> Slow down, do the job right the first time, and you will be safe and faster than you think because you either won’t get hurt in the process or have to re-do things. In that moment, I had fish to catch, and I surely wasn’t going to be able to land any if I did not drastically slow down and reset myself.

I continued to ping-pong back and forth between thoughts of fishing and thoughts of work. The initial leader comments from the conference call replayed in my mind. I *should* look at the VSP for me, this could be a great opportunity. What prevented me from *not* doing this? People do this sort of thing all the time, they change jobs even without a financial safety net, so why not consider it? Attitudes toward changing employers is on the rise, and I seem to be in the minority.<sup>8</sup> Maybe my loyalty of 15-plus years was hampering my ability to explore new challenges. This argument played out in my mind, and as much sense as it made for me to look at it, I had a counterbalance of guilt. This isn’t something I

<sup>7</sup> In 2015, during a work stoppage where in excess of 35,000 union employees authorized a strike to force new contract negotiations, many management employees were pressed into service to keep operations afloat. I spent a few months as an outside technician performing installations of fiber-optic services in consumer homes. In preparation we attended training for various roles in order to continue service to the customer base. I was looking forward to learning the skills required for an outside role with tools and trucks – so much of my job was long-range, project-focused, with hands spent glued to a keyboard that I welcomed the new opportunity. Simplifying my double-loop feedback modality for one with more immediate gratification and shorter timelines to completion.

I was definitely in the minority, not everyone shared my enthusiasm for forced transition to an unfamiliar role for an unspecified period of time. The outside role was physically demanding, and many opportunities existed for danger and potential injury unless one remained vigilant, especially climbing utility poles safely. This was a skill taught over two weeks for full-time technicians, and we learned in two half-day courses. Our instructors, by pure coincidence, were all United States Marine Corps veterans and they repeated a phrase over and over again whenever someone let their nerves get the best of them: “slow is smooth, and smooth is fast.”

The technician experience provided many invaluable lessons that helped inform my own ability to embrace change and simplify complexity.

<sup>8</sup> According to a 2019 Deloitte study, 57% of survey respondents felt that it was easier to obtain a new job outside their current organization (Deloitte, 2019, p88)

should do. Or is it? Back and forth this played out in my mind until simultaneously I finished rigging up my line and the call shifted to a Q&A session.

As my peers peppered the leaders with questions, I found myself calming as they raised many of the baseline concerns we all had. When would people need to decide? How might this impact the business? What if our whole team volunteered? What if no one volunteered? My mind started to wander in thought as I cast forward into the next upstream pool, then BAM! A strike worthy of a white marlin, followed by an epic battle – reeling, swiftly stripping line in but not too fast, and I reached for my net. Exhale. A native brown trout that barely extended past the edges of my palm. I laughed out loud, this certainly would not land me on the cover of any fishing publication. Fishermen often talk about the nerves subsiding after the first catch of the day, and this was no exception. Suddenly all was right with the world. The plane ticket expense, the schedule jockeying to secure a long weekend off with my wife and away from our children back in Pennsylvania, the money I spent at the fly shop the day before in preparation – all worth it.

I saw a ripple in the next pool, and I intentionally placed a fly right where I saw another fish and BAM! That fish hit immediately on the first cast. Everything faded away, I was dialed in. People were asking astute, detailed, thought-provoking questions on the call and I intently listened. Another ‘riser’, another cast, another fish landed. The fish were really starting to feed, and I was casting

from target to target. BAM! Next question, great point made. Another fish landed. Time stood still.<sup>9</sup> In balance of conference call and casting I felt the flow.

I lost track of the number of fish landed, an ideal problem for any angler to have, as I moved upstream from spot to spot all the while listening to my leaders and peers on the call. I started to formulate a game plan to engage the leaders that reported to me. I would call each of them later that day and help to prepare them, this was the right thing to do, without going into too much detail as to protect my obligation of confidentiality. I also developed a personal strategy – share the news with my wife, my college friends, and I started a mental checklist of advisors to consult for my personal decision. Before I knew it, my train of thought was broken by the staccato-like progression of tones as people exited the conference call and went on about their Friday workload. My fingertips were numb from all the fish I released into the cold mountain stream, and the coffee was gone, so I headed back up the trail to the car. What a great Friday.

### **Sharing the News**

I remember it feeling awkward to start the conversation at first. I started to share the purpose of the call with my wife of 12 years as I poured a half cup of coffee at our friends' house in Breckenridge, still a little numb from the time outside. I barely made it past the phrase “voluntary separation program” when

<sup>9</sup> The sensation reminded me of Mikaly Csikszentmihalyi, a psychologist I studied during the first class in my program at Penn, who explored the innovation that creative individuals can infuse into organizations. Describing this optimal experience as “flow”, “the feeling when things were going well as an almost automatic, effortless, yet highly focused state of consciousness. (Csikszentmihalyi, 1996, p110) Further, “we are fully immersed in what we do, fully absorbed, even losing a sense of time, and we’re able to function at our best.” (Csikszentmihalyi (2004) These feelings generated while performing at a high level, while in a flow state, motivate people to continue to seek it out. In turn, these creative individuals can be a great source of innovation and transformation for organizations.

she blurted out “so you’re taking it, right? Why wouldn’t you?” Before I could expand on all the reasons – why I was afraid of this decision, the numerous doubts I had – she launched into how great this could be. I could get another start, this was a great opportunity, why not consider it; she was having none of my self-doubt. It was almost as if she had wanted to have this conversation for some time, and now the floodgates were open and she was free to share her long-held thoughts and ideas. From her perspective this was a good thing, a great opportunity, and she was unconvinced that I shouldn’t embrace this.

A few months prior she experienced a similar career transition, leaving her practice as an emergency medicine physician for a job with a start-up in the burgeoning medical billing consulting field. She was burnt out for a long time, for many reasons, and over a period of almost a year worked to find an alternative to the soul-crushing environment in which she found herself.<sup>10</sup> I had been by her side through most of her transition, counseling, debating, supporting, challenging her decision and her process. It was not always smooth, and it was hard at times to separate the emotional impact of her decision and actions on me as a husband and partner. I aspired to be supporting, but at times felt far from that.

<sup>10</sup> This is an increasing trend in medical workers, with contributing factors representing an overall unproductive and outdated attitude towards the environment. A commonly held belief is that the nature of providing urgent care takes a mental, emotional and ultimately physical toll on emergency care professionals – while true, it is also exacerbated by a challenging environment and lack of administrative support. The combination leads to burn out, as Valcour (2018) identifies:

“Managers and employees in organizations around the world have bought into the assumption that pay and other contracted rewards are all you can expect to receive from work (and all that you owe your employees) and that it’s unrealistic to hope for less-tangible benefits like trust, respect, autonomy, civility, and the opportunity to make a positive impact on others. This impoverished view of work plays out in workplace attitudes and behaviors that burn employees out.”  
(Valcour, 2018)

Much of the challenge centered on financial uncertainty, but I also found it difficult at times to not focus on a perceived sense of loss. In my view, she had the perfect opportunity to manage her schedule. She had a high degree of flexibility in setting her own schedule, was not chained to a typical Monday-to-Friday-9-to-5 as I was; even though I wanted her to be relieved of the crushing stress associated with the undesirable aspects of her job, deep down I hoped she could make it work. I think this impacted my ability to fully embrace her career change. I projected my insecurities on her moving to the very type of schedule I felt suffocated by. I mourned the perceived loss of her having so much free time – it was easy for us to pick up and travel during the week (even with our children in school, we treated the school district's 10-day allowance for family trips as a budget for adventure travel instead of a restriction). I too was guilty of an outdated approach, too focused on the compensation and the financial impact, at times to our detriment. Since much of the stress with her transition was masked by financial concerns, the compensation provided by the VSP appeared a welcome parachute.

The change in seasons paralleled an upcoming change in my perspective. The autumn timing of our trip to Aspen was no coincidence. The trail race drawing us in was aptly-named the Golden Leaf Half Marathon for the brilliant yellow hues of the aspen trees as they transition prior to winter taking hold in the Rockies. They provide a stark contrast to the summer mountains, flames of gold and orange streaking across the green, brown, and gray backdrop. The change is fleeting, only a brief window of time before the colder temperatures bring snow

and early winter weather. The drive from Breckenridge to Aspen, over fabled Independence Pass, was nothing short of breathtaking, and in 2018 I was determined to soak it all in. We carpooled with friends, affording a perfect opportunity for my wife and I to further explore the morning's new developments.

### **Crowdsourcing**

I prefer to collect as many opinions as I can, even from people I don't typically align or agree with. My personal adaptation of crowdsourcing, as Oxford defines "the activity of getting information or help for a project or a task from a large number of people, typically using the internet." (Oxford, 2020) I preferred to solicit in person when possible, and with a smaller select audience. Often, the expressed views surprise me. Other times, they validate my (opposite) views. Sometimes they challenge me in a way that shifts my perception.<sup>11</sup> All of these insights are invaluable, and a useful part of the process. Our trip provided a fine crowd to source.

<sup>11</sup> When confronted with decision points, I often crowdsource opinions. This practice serves two purposes. The first is obvious, the more people I consult the more ideas I am exposed to in quantity and variety. Crowdsourcing also helps me better understand my own feelings. I sometimes see my thoughts reflected back at me, and then I can better determine how I truly feel, despite the noise. One analogy to help illustrate is a deck of cards. I tend to share my thoughts as one might sort a deck of playing cards. Best to get them all out in the open first, all on the table, before I can begin to sort them into categories. The hearts, spades, diamonds replaced with the level of conviction I have regarding certain points. Part of my process, which can be a challenge for others to understand, is to say the things aloud that are in my head. Verbalizing a thought does not necessarily imply a high degree of conviction. Sometimes I just need to hear a thought aloud, or hear others' reactions, to evaluate how I truly feel about it.

This approach is not without complications. It is most effective amongst peer groups that are familiar with my style and approach. I tend to hold back in my initial interactions in new groups, recognizing that my voicing an opinion could be misconstrued since not everyone works through things in this manner. It has the possibility to alienate people, potentially shutting down alternate perspectives or worse drawing false conclusions based on something I may not even agree with.

My audience in Aspen was a cross-section of different careers. Two physicians, with longer tenures in stable positions. One civil engineer with the National Park Service (NPS) and one who steadfastly prides himself in the caliber and quality of his work, while refusing to allow work to overly stress him out; I'm jealous of this ability, something I have yet to achieve on my own. Two others that worked for multiple companies and do not hesitate to move or explore new opportunities with large companies, start-ups, or mid-size organizations. Lastly, another who has been with a company for 15+ years in a variety of roles of increasing responsibility. He and I have found ourselves in similar positions, had similar feelings of undervalue by our employers, and similar frustrations feeling that we could each accomplish more within our respective companies than we were in position to do. This dilemma seems all too common with loyal employees.

Staying with a company – remaining loyal – is not good for your wallet. Companies pay more to import talent than to reward the organic homegrown talent in many cases. Human Resources professionals at my employer, and most at other companies I interact with, did not refute this practice. Colleagues often suggested that the best way to increase salary was to leave for a competitor for a few years and return. Our company ethics code prevented direct sharing of former company details, so it's not as if one was being compensated for some form of corporate espionage, regardless the practice continued to baffle me. I found myself at this decision point a few times in my career which had a definite impact on my relationship with my employer. I could not grasp why a company

would not want to reward someone who wanted to remain loyal on the same scale as bringing in new talent. Despite these feelings I remained loyal.

As I talked this through with my friends, some likely thoughts emerged. Overall the conversations helped me to look into this, to allow myself to explore the possibilities. Part of my hesitation was a thought that I could not take advantage of this opportunity, that for some reason I was not allowed to consider it. My NPS buddy had an expected response – “Do it. Stop thinking about it. Where are you travelling during all that time off?” To him, even in similar position as the breadwinner for his family, I had only one option, to take it and run. Not a bad suggestion.

Adding to my considerations – being a father with small children. My job had been the stable force in our family for the past 15 years. Despite the highs and lows that sometimes came with commission-based sales, the salary was in the bank every two weeks and the medical benefits were top-notch. Minimal concern about job loss or an inability to provide for my family. Part of my hesitation was rooted in a reluctance to let go of this. As some friends reassured, changing jobs did not guarantee this loss. In some cases, the opposite could happen with better salary, benefits, flexibility. Maybe some things would be worse off, but others could be better. Nothing was guaranteed, good or bad, so I needed to move beyond a myopic view of the unknown. I headed to bed, all my strength would be required to tackle the mountain the following day.

Race day came, and with it a mixture of emotions. I felt strong heading into it, my plan to prepare had been a major focus, the single-loop feedback



guiding my double-loop strategic adjustments. (Torbert, 2004, p89) At the same time, a polarizing feeling lingered that had become a new norm. Replacing the stress of the unfamiliar I experienced in 2017 was the stress of improved performance – the need to go up and to the right. Prior year experience assured me I could finish the race, and I should be faster this year, but would I be? If I completed the race but did not beat my personal best time then it felt like a potential failure. I worked harder this year, pushed by my remote training buddy and the connectedness that comes from leveraging the online accountability application Strava<sup>12</sup> as a workout partner, motivator, performance tracker, and courier of shame all in one. The powerful motivation of a crowd, virtual and in-person, captured in the African concept of Ubuntu – “A person is a person through other persons.” (Abrams, 2016, p60) The collective motivation of everyone increased the overall performance of each individual. The awards, the achievement medals, the tracking of personal performance on repeatedly-run segments – all of these encourage one to lace up running shoes in the cold, in the rain, in the waning daylight, with the lingering dankness on the breath of one too many IPAs from the night before. The desire to achieve, and the

<sup>12</sup> Strava is an online platform to track statistics from athletic pursuits and share amongst followers with similar interests. “Strava is Swedish for “strive,” which epitomizes our attitude and ambition: We’re a passionate and committed team, unified by our mission to build the most engaged community of athletes in the world.” (Strava, 2020) The platform allows users to create “segments” to save popular routes. “Segments accomplish(ed) two things: It was a technical, performance-based feature designed to measure and enhance your training—and yet it also fostered the kind of social community-building that Strava says was always its mission.” (Gross, 2020)

accompanying recognition, is a strength I have relied on for as long as I can remember, and one that gets me out the door almost daily.<sup>13</sup>

The race started well – I powered up the initial brutal hill climb and settled into a good rhythm for the first few miles before something grabbed hold of me. I think the combination of the thin air at altitude and stress combined to form a toxic cocktail that began to rob my lungs of much-needed oxygen. My legs became intermittently paralyzed with cramps and a mental battle raged to keep my body moving forward. Glances at my watch focused on the time, and I, unwilling to relent in my pursuit of improved performance, trudged onward. This was not enjoyable, not fun, and I was miserable, until I had a revelation about eight miles in. Cresting a hill, the sun beautifully streamed through the golden aspen leaves. I literally stopped in my tracks to soak in the view, and I came to my senses for a moment. I was in a gorgeous place, with gorgeous weather, doing something I loved. Why was I torturing myself with the pressure of finishing with a faster time? I experienced a sort of mindfulness, in contrast to a flow state, where I became acutely aware of how I was feeling at that point in time and how

<sup>13</sup> “Now, Discover Your Strengths”, and the accompanying “Strengthsfinder 2.0” by Buckingham & Clifton was a formative read early in my academic career, and greatly informed my personal and professional development. One of the primary tenets of the book is that management approaches need to migrate from a dated perspective of eliminating weakness, popular in business texts up through the 1980s and rooted in a machine-oriented philosophy – if a part in the machine is broken (or underperforming) simply replace it with a newer/better part. This may improve performance, but “you will excel only by maximizing your strengths, never by fixing your weaknesses” (Buckingham & Clifton, 2001, p26). Weaknesses must be held in check, but playing to your strength will achieve an optimal result. Accompanying this theory was a personality trait questionnaire that helped determine a person’s top five strengths. One of mine – Significance – is described as “Your yearnings feel intense to you, and you honor those yearnings. And so your life is filled with goals, achievements, or qualifications that you crave.” (Appendix A) This strength continues to pull me upward, to seek achievement and the accompanying recognition.”

it was affecting me. One belief amongst Buddhists is that “mindful awareness such as self-observation is the key to enlightenment.” (Mercree, 2015, p82) In contrast to a flow state, at that moment I cared more about the experience of the run itself than the finish, and I felt a renewed energy to keep going. Whether it was enlightenment, or a runner’s high<sup>14</sup>, it was a powerful motivator. I actually started going faster, enjoying myself more with each step, emotion converting to kinetic energy and propelling me even faster down the mountain.

I powered through, prevailed, and made it across the finish line in less time than the year before. The altitude caught up with me again and I spent some time recovering near the medical tent, which also allowed for some post-race reflection. I attributed my physical struggles to the undue stress I put on myself, coupled with altitude and exertion level, and that realization frustrated me. Again, this was something I elected to do, something I wanted to do, so why had I been so reluctant to allow myself to enjoy it?

### **Back to the Grind**

I came home from Colorado with a renewed sense of vigor. Expanding my crowdsourcing, I eagerly shared my thoughts with classmates studying trends in

<sup>14</sup> The term “runner’s high” is attributed to the euphoric feeling runners can experience while on a run, or directly upon finishing. Emphasis on “can” – achievement is not guaranteed, nevertheless is an object of pursuit among most runners. Further explained: “Recently, researchers studied how the brain responds to running and found that the ability to get “high” while logging miles might be hard-wired within us. Years ago, our ancestors’ survival likely depended on chasing down food. The desire to live was possibly their motivation to run and run fast, and the feel-good brain chemicals released when they did so may have helped them achieve the speed and distances required, says David A. Raichlen, Ph.D., an associate professor of anthropology at the University of Arizona. (Fetters, 2019)

human capital management. One of the things I loved about my program in particular is the cultivation and continuous expansion of a diverse network of people. Surrounding myself with motivated scholars provides an incubator of creativity, inspiration, and encouragement to further grow and learn through sharing ideas. My class group at the time was no exception.

I approached many of these early conversations with hesitation, still saddled with the thought, the guilt, that accepting the VSP wasn't for me. Not something I could or should take advantage of. A battle raged in my head between the pragmatist that said "you're not happy, go" and the nostalgist that said "you can't leave, you should just find a better way to make this work". These feelings paralleled much of the text we were exploring in class. One of my classmates posted an inspirational article on LinkedIn regarding her decision to undertake a professional sabbatical the year earlier, and it struck a chord. Not only that, it gave the fledgling idea a name in "sabbatical".<sup>15</sup> This was not some crazy notion, some abstract fancy, moreover it is something that people actually do from time to time. Safety in numbers, herd mentality kicked in. What seemed

<sup>15</sup> During this period I experienced a high-level of stress, rooted in my decision to move from a known environment to pursue one unknown. The destination was not clear, I was charting my own course instead of following a blueprint, and the stress of the decision was clouding my judgement. The clarity I experienced once my loose plan had a name in sabbatical reflects a theory in the evolution of consciousness. Robert Kegan offers that "the process of growth involves an evolution of meaning that is marked by continual shifts from periods of stability to periods of instability, leading to ongoing reconstruction of the relationship of persons with their environments." (Reis, 2020) I was able to move beyond my instability the moment I was able to classify this next step, to objectify it as a sabbatical and take control of my attitudes toward it. Kegan further offers that in the "Instrumental Mind" state of consciousness that I found myself in, I was "able to construct "durable categories"-classifications of objects, people, or ideas with specific characteristics (Reis, 2020) As a result, their thinking becomes more logical and organized, their feelings are more enduring. This explains to an extent why I was able to move forward with more clarity and purpose now that my endeavor had a name.

at first to be this crazy idea, crazy journey – albeit one I would embark on solo and in a different way from others – had a name and I found solace in that. Suddenly telling people I was considering a “sabbatical” made the conversation easier to initiate. The quote that still rings in my ears – “Not-totally-happy-but-not-unhappy was no longer enough” (Mogee, 2018).

The phrase played over and over in my mind. It very simply distilled the myriad of emotions for me into a simple phrase & concept. Someone else felt what I felt, and a cautious optimism began to settle in, maybe I would allow myself to consider this after all. Somehow the fact that someone else went through this helped affirm my sentiments, and also comically triggered thoughts of a classic Homer Simpson moment when faced with the expensive purchase of a hat autographed by Tom Landry. His son Bart asks “Why don’t you buy it?” and Homer responds “I can’t buy that, only management-type guys with big salaries like me can afford things like that. [gasps] Guys like me?! I’m a guy like me!” (Swartzwelder, 1996). My brain works in mysterious ways, randomly recalling facts and making connections that are not always immediately obvious, sometimes to my benefit.<sup>16</sup> There is always room for healthy dose of humor, one should never take himself too seriously.

<sup>16</sup> Another identified strength from the Strengthsfinder profile is Ideation, specifically: “An idea is a connection. Yours is the kind of mind that is always looking for connections, and so you are intrigued when seemingly disparate phenomena can be linked by an obscure connection. An idea is a new perspective on familiar challenges. You revel in taking the world we all know and turning it around so we can view it from a strangely enlightening angle. You love all these ideas because they are profound, because they are novel, because they are clarifying, because they are contrary, because they are bizarre. For all these reasons you derive a jolt of energy whenever a new idea occurs to you.” (Buckingham & Clifton, Appendix B) In the moment I did not embrace this as a strength, moreover I wrote it off as a stress-diffusing coping mechanism created by my brain.

Even so, I still had my doubts in sharing with my classmates. I was almost ashamed. I expected someone to react negatively to my decision, call me a quitter, or assume I was weak for not being able to hack it any longer. In many ways this was how I viewed myself, and the possibility of leaving my job behind. At work we would often joke when someone was promoted, or left for a favorable or otherwise upward-moving position that he or she “made parole”. On the contrary if he or she left while demonstrating low performance, appeared overly stressed, or even a reduction in role/responsibilities, it signified weakness. Everyone did not feel this way, but strangely I did. I was extremely judgmental, in some ways insulating myself from my own insecurities and jealousy.

In order to avoid these insecurities, I projected my fears onto those who left. I was strong, courageous, dependable, loyal – right – in staying. Those who left were giving up; I was better, and a better employee, for staying. Except I wasn't, I didn't actually believe those things, no matter how hard I tried to convince myself to the contrary. In hindsight in some ways I enabled myself to hold myself back.<sup>17</sup> I associated negative things with people who left, and I was someone who stayed, then I must be doing the right things in staying. It seemed

<sup>17</sup> One of the more rewarding experiences during my tenure was a class co-taught by a professor and an active member of the United States House of Representatives from a district in Philadelphia. On Saturday mornings we debated political science theory with real-world examples of how complex things were accomplished in Congress. Loyalty came up frequently, in many applications. Loyalty to self, to principles, to political party, to leaders – and the constant compromises required to maintain those loyalties. Hirschman (1970) suggested that dissatisfied members in an organization expressed themselves through exit (leaving the organization), voice (speaking up to improve), or loyalty (staying with the organization). The interactions of these responses influenced the overall health of the organization and the attitudes of its members. “As a result of loyalty, members will stay on longer than they would ordinarily, in the hope or, rather, reasoned expectation that improvement or reform can be achieved ‘from within.’” (Hirschman, 1970, p79) During my time in that class, I had not considered “exit” as a viable personal alternative.

that my loyalty, coupled with a lack of improvement in my level of engagement, was contributing to my dissatisfaction. It was easier to stay and thus easier to create reasons to stay, and evaluating my options for the VSP was increasingly challenging. If I was going to make an objective decision, I could not rely on my instincts alone, I needed help to sort this out.

### **Crowdsourcing (Again)**

I made a list of the people I wanted to discuss this with. I split the top half of the page vertically into columns. People who would tell me I was crazy for leaving went on the left, those who I expected to tell me to leave on the right, and the bottom half of the page open for those I was uncertain about. I used the platform provided by my current class to request an interview with one of our Senior Human Resources (HR) leaders, the head of the business partner team that supported Global Sales. In my mind there was no better time to engage in this conversation, and I set the interview for a week before the decision deadline.

I drove to our corporate headquarters in central New Jersey, all the while nostalgic, acutely aware that if I volunteered this may be my last visit as an employee. The meeting with the HR leader helped me understand a macro perspective for the changes within the company. The company was preparing for a change in go-to-market strategy, and the VSP would encourage people to take an objective look at his or her role with the company. New opportunities could manifest for those who stayed, and those who decided to leave would do so well-compensated. I also scheduled a long, slow meal with one of my mentors, a staunch supporter and also my current Vice President (one level above my direct

supervisor). I worked for him a few times previously in my career. I learned a lot from him. Sales techniques, people leadership, the art of being persuasive and persistent without being pushy. Getting things done. I admired this leader for many of his traits. His thoughts, his opinions, his acceptance – and to some extent his blessing – was something I desired to move forward.

A recurrent theme persisted; I was also nervous to have this conversation. I did not want to be perceived as giving up, as not being able to be counted on. Similar doubts that my network of cohorts had helped me overcome. The possibility existed that even in volunteering I might not be accepted, and would then return to my role, so the conversation needed to be handled delicately. I asked to have dinner, hoping the one-on-one time, outside of the office, would provide the ideal distraction-free and wine-enhanced environment to have a productive dialogue.

We had many conversations about my demonstrated strengths, the great things the team had accomplished that year (and in my tenure) and agreed on most of the areas of opportunity that I and the team had for improvement. Part of the disagreement stemmed from a lack of clear measurement system for the performance of my team. I couldn't help but feel as we reviewed these that I had failed in some way. Leaving was quitting, staying was what I should do – to continue to rise to the challenge and deliver. I felt that I was cultivating a positive performance culture downward, but it felt wholly different than the environment I found myself in, and in my relationship with those I reported to. The gray area – the lack of my own clear measure and agreed-upon results target – was



purgatory<sup>18</sup>, and subjected me to a continuous emotionally-charged roller-coaster.

There were many times where I was frustrated with my ability, moreover the perceived lack of ability, to have the impact I felt I could truly make on my business.<sup>19</sup> My teams engaged, re-engaged, launched, tweaked, five different business plans in my 27-month tenure. The ink was barely dry on some plans before new plans were being developed in at least two instances. I was charged with leading teams to drive new business opportunities in a very fluid and evolving business segment, so some of this was expected. My team was an anomaly within a sales organization. This presented challenges both invigorating

<sup>18</sup> Human Capital Management as a course of study provided a lens to evaluate much of the current challenges I was experiencing. I had many conversations about the mis-match in compensation for my teams compared to the work they were being asked to perform. At times the attitude of senior leaders suggested that my teams should be thankful to be employed, and the pay structure in theory was rich, but the constant changing of goals made it almost impossible to achieve. This created a motivational nightmare for me and my supervisors. Mourinho-Ruiz (2017) supports this belief that our environment was not optimized for success:

“The leader’s success is dependent on his or her employees being successful. How he or she approaches the role of being the boss will create a department’s environment and culture. If he or she believes his or her role is being the boss—the ultimate decision-maker who everyone comes to—he or she will then create a culture that is one of an outdated mode of thinking and operating. If, on the other hand, he or she believes his or her role is one of ensuring the objectives are achieved through others’ successes, that his or her employees should be treated with human dignity, and that everyone has something good and unique to contribute, he or she then can create a different culture. The leader’s role is to focus on himself or herself, his or her behaviors, and how he or she comes across; on others to understand his or her perspective, and engage the leader; and on the environment or organizational culture of the organization and/or department.” (p67)

My inability to positively impact this environment for my teams was a source of constant frustration, and contributed to my personal dissatisfaction with my role.

<sup>19</sup> Happiness is not restricted to a particular job title, or an increase in salary, or even the acquisition of treasured artifacts. As Daniel Pink describes, “If you are going for title and compensation, think again!” More money and a better title rarely are what make you happy in a job, he says. Instead, look for autonomy, mastery, and purpose.” (Gallo, 2015) A contributing factor to my lack of happiness might be traced to misaligned priorities for advancement. These realizations helped motivate me to continue soliciting opinions, and continuing to peel back the layers to understand the root of my motivation for change.

and frustrating. It was fun to be asked to tackle new business problems. The frustration came from a leaders' lack of patience to allow a plan to take root. My challenge was not unique, as Ram Charan (2018) suggests:

“The top of a company must also align behind something else: the story you’re going to tell investors. If you’re leading a talent-driven organization but talking strategy-first to Wall Street, there’s a disconnect between your company’s public and private personae. That’s not good for your investors, your company, or your workforce.” (Charan, p727)

Leaders have to align with the message shared with both employees and mid-level leadership. The talent and the strategy must align with the performance measures, the team must have the talent to perform, and the compensation plan must be aligned to support both. If any of these three critical elements – strategy, performance measures, compensation – are misaligned it is difficult to motivate the team, and even more difficult to improve performance. I experienced this firsthand, and complicating matters was a mismatch in my immediate chain of command, in expertise and in approach with senior leadership.

The choice was placed in front of me: volunteer to leave, or be a part of a transformed company ripe with new challenges and opportunities. The financial freedom to chart my own course for a few months versus helping to lead change in a vibrant and evolving Fortune 19 company. Not a simple decision. Countless hours of deliberation, counseling sessions with friends, colleagues, peers, family, my ever-understanding and supportive wife, all helped me sort through my

feelings to ensure that I was running to, not away, from something.<sup>20</sup> I was about to step into the Neutral Zone with both feet, towards a new and uncertain beginning. (Bridges, 2009, p5) I volunteered, was accepted, and embarked on a new adventure.

### **De-Programming**

A strange thing manifested in the early months of my newfound liberation from the daily responsibilities of work. People would ask things like “What’s your plan?” or “What’s next?” or “What are you doing with this time off?” or my personal favorite, from a neighbor at the morning elementary school bus pickup “what time do you crack your first beer?” Everyone was curious, no shortage of inquiry. I had an answer I gave so frequently it began to feel like an elevator pitch. It contained all the elements of the factors that influenced my decision – increased time with family, time to invest in my personal development, complete my outstanding Master’s thesis, among others. All of which were real components of the decision, but not exactly a plan in the same way one would implement a complex project over time. I felt compelled to convince people that I in fact had a plan, that I simply hadn’t embarked on a fool’s errand, that there was a point or a goal or an end result in mind. Afterall, so much of my life to this point revolved around the pursuit of goals, of achievement, certainly this major,

<sup>20</sup> “I’d reached a point in my life and career where many of us arrive. I was still capable, I realized, of so much more in life. More success, however I wanted to define it. More love. More family. More intellectual stimulation. More impact on others. And I needed the input from my trusted advisors to help guide and shepherd me along the way.” (Ferrazi, 2009, P126)

life-changing, monumental, earth-shattering change was born from a plan. There had to be a point to all of this, or so I inferred from the line of questioning.

These thoughts coalesced in my head, doubts about whether or not I was taking the right approach to my sabbatical. During the daylight hours there was plenty to keep me occupied. I frequented a few local fishing holes during the week, finally achieving one goal of catching multiple fish on flies that I learned to tie. Weekday fishing was a luxury previously unfathomable. Historically I would take great measures to plan specific trips to fish or ski, but to simply wakeup and decide to fish on a random Thursday with no prior thought was not something to which I was accustomed. I also took on some new home improvement projects, taught myself a few new carpentry skills and built a new dining table for the deck, a new rack for my fly tackle, among other things. I organized, cleaned, and reorganized my garage. I shuttled my boys to and from the bus stop, and otherwise managed to keep my day full of tasks.

I also started to think about implementing a new daily workout plan. I was registered for a triathlon in early June and needed to balance my workouts between the pool, my road bike, and my running. My typical race preparation entailed a framework cobbled together from various sources, an amalgamation of ideas that seemed to me a better approach than blindly following one author or ascribing to a single method. In my mind I envisioned a highly productive day, beginning with an efficient workout, followed by a solid healthy breakfast, and a fulfilling daytime activity before the boys returned from school. Routines were not

my norm, but I aspired to implement one during my sabbatical.<sup>21</sup> The most effective leaders have routines that help them achieve maximum productivity and I felt this was an important shift I needed in my daily approach. Focused on trying new things, creating better and lasting habits, adding additional purpose – all components of my loose sabbatical plan.

This approach actually began to have a converse effect on me. Time raced by when the sun was up, but at night it was a different story. I found myself ever-restless, at times waking up hours before dawn in a cold sweat, unable to quiet voices of discontent in my head. “You’re wasting time”, “You’re squandering this opportunity”, “You should be maximizing this amazing benefit afforded to few others”, “You’re not doing enough.” Devoid of the demands of an externally imposed schedule, I found myself lost, listless, unfulfilled, and the stress was mounting.

The thing I desperately sought – time – was now an enemy. A destructive influence. A lack of schedule, of routine, was preventing me from moving forward. Some days it was hard to get out of bed.

<sup>21</sup> Stephen Covey, author of the widely successful “The Seven Habits of Highly Effective People” recognizes this challenge. I had leveraged his text so support personal and professional growth at different points in my career, growing and learning as I appropriately applied different principles to different situations. Covey also talks about the need for balance in renewal, providing a lens for the struggle I experienced:

“The self-renewal process must include balanced renewal in all four dimensions of our nature: the physical, the spiritual, the mental, and the social/emotional. Although renewal in each dimension is important, it only becomes optimally effective as we deal with all four dimensions in a wise and balanced way.” (Covey, 2004, p302)

I was taking a scattered approach to development, to improvement in some aspects of my life – but my approach lacked balance, and the lack of balance created stress, creating an exasperating cycle.

This seemed crazy to me, yet I had an almost-daily struggle. A seemingly unbreakable cycle. I'd wake up in the middle of the night, have trouble falling back asleep, then awaken with my alarm and feel completely drained. I had little energy for physical activity, so I would delay until later in the day, adding a run or workout to the daily list of tasks I would build for myself once the boys had boarded the school bus. Crossing things off the list as they were completed felt good – motivating, accomplishing something, fulfilling. Checking tactical items off the list provided a sense of accomplishment akin to my running & triathlon training. I think this is one reason sales was part of my profession for so long – incremental goals with daily/weekly/monthly checkpoints. Instant, single-loop feedback. Progress against a scorecard. In my personal life there was little preventing me from achievement, yet there was a void in my self-motivation. If this was an objective in my running plan, to meet or exceed a mileage goal for instance, I simply ran farther, or worked in another run if my weekly goal progress was lagging. I would then record my effort, evaluate my current statistics, and bask in the positivity of achievement.

This is one of the reasons I found my current struggle so baffling. I was in charge – the day was mine to sculpt and shape how I wanted – so why was it so stressful? A colleague had recently finished reading a book from Jerry Colonna, and suggested it might be helpful. In talking with high-performing executives, Colonna surmised “We’re all so desperate to move up and to the right. We’re convinced that any motion that isn’t straight, direct, up and to the right is somehow not part of the path. What if being lost is part of the path?” (Colonna,

2019, p139) That last part helps encapsulate the next shift in my attitude – *what if being lost is PART OF THE PATH?* Viewing this in a rearview mirror, Colonna really captures the essence of what I was feeling. I realized I had to approach this sabbatical differently than the way in which I attacked my daily goals while employed. “Up and to the right” might not be my ideal trajectory to navigate out of the Neutral Zone. I needed to shed the mantle of my corporate ways and de-program myself.

Prior to leaving my employment I joked about the “Summer of Zach” but these first few weeks were anything but enjoyable. This recognition generated what Colonna refers to as a strategic retreat. Colonna recounts, in a conversation with an early mentor and accomplished chess player:

“There are times both in chess and in life, when you’re going down a certain path and you hit a roadblock. And then you realize that the moves you’re trying to make aren’t working out. ‘At those times, I have to abandon that game plan and re-strategize, and make a strategic retreat and take a different plan of attack.’” (Colonna, 2019, p154)

Alternatively, a strategic retreat was recognizing that the current plan wasn’t working, and having the courage to course-correct and make a change. My struggle surprised me. I felt as though I could have easily advised a colleague to help break out of his funk, if I was hearing these stories told to me, but for some reason I struggled to take what might have been my own advice. Colonna also bluntly offers “Just because you feel like shit doesn’t mean you are shit.”

(Colonna, 2019, p186) Nevertheless to break through and make a change, to

make forward progress in this neutral zone, I would have to listen to myself and others, and take action. Time to put my foot down and make a strategic retreat.

### **Race Training & Reflections**

Running provides me a number of benefits. My relationship with running began as a youth, a way to keep in shape during the spring months. Specifically, the spring of my freshman year of high school marked a departure for me, the first season I was no longer playing baseball and found myself with a team sport vacancy on my calendar. Following my father's suggestion, I tried out for my high school's track team. I never envisioned myself as a particularly fast runner, and my membership on the team did little to change that. Thankfully the smaller size of our school meant a no-cut policy – if one showed up and worked hard then he was on the team, regardless of racing outcome. I started as a sprinter, moving to distance as a sophomore, finding the longer distances more rewarding, and the longer training runs more enjoyable.

A transformative point in my running career came as a junior, at a late-season meet with a division rival. The 3200M was my signature, and since the race was second to last in the order of events, the points earned were often inconsequential to the overall outcome of the meet. This particular meet was different, each event hotly contested. Our head coach approached me with a challenge. The team needed a 3<sup>rd</sup> place finish from me. Our opponent had a few strong runners in this race, and if they succeeded in a 1-2-3 sweep it would put a lot of pressure on our team in the final event. If I could muster a 3<sup>rd</sup> place finish then our rival would be mathematically prevented from winning the overall meet.



He advised me to pace with the rival's #2 and not allow him to get too far in front. Flattered by the unaccustomed personal attention, the pressure had a positive impact on me – it felt good to be counted on. Nerves building, I took my place at the starting line. I had to deliver if I expected to be counted on again.

The top seed burst ahead with a blistering pace at the onset, and I knew better than to try and maintain, for fear of burning out early and potentially not finishing the race. The 3200M is 8 laps around a 400M track, and for the first few laps I settled into a comfortable rhythm, squarely in 3<sup>rd</sup> place, with two opponents close on my heels. Fatigue and muscle pain built in my legs, and I felt myself slowing a bit to conserve energy for the final 3 laps. In a moment of reflection, of runner's clairvoyance, I recalled a phrase, "pain is temporary, pride is forever." To this day I'm not completely sure of the origin, though I think it was shouted by a teammate. Something snapped within my mind, and I accelerated, ignoring the physical signals of exhaustion. The results were astounding: it didn't hurt, my legs weren't falling off. To the contrary I actually started gaining on the #2 runner ahead of me. My coach noticed, my teammates noticed, and with 600M to go I heard them cheer me on.

I entered the final 400M lap almost even with the #2 runner and I began to overtake him. He sped up and I matched him, passing him at the first turn. I gave everything I had as I looked ahead to the #1 runner nearing the finish line. It felt as if our entire school was along the final straightaway as I crossed the line in 2<sup>nd</sup> place. The meet was secured, I felt like a hero, but most importantly I learned an

incredible lesson about myself and my ability to push beyond perceived boundaries. The team counted on me, I delivered, and it felt great.

During the race I thought I was done, I thought that running conservatively was the best strategy, and that success came from methodical improvement over time. While that may be true, the bigger takeaway was that I had another gear. When faced with adversity, even a predictable outcome, I could push through and perform better. I could be counted on; I could be coached to excel. I've travelled thousands of self-powered miles since that day but nothing comes close to the runner's high that I felt after those two miles. That was a point where I experienced an ending, and entered into a new neutral zone – my identity shifting from participant to a runner who could be counted upon.

Reflecting on that moment, my personal narrative changed. My story was now different. To better understand this transformation requires another backwards glance, this time to a discussion from Uppsala University in Sweden in 2009. A few Penn colleagues and I traveled to study with Swedish thought leaders to gain insight into different perspectives and strategies for success. We met with Gunnar Olsson, Professor Emeritus of Social Economics and Geography. Olsson provided a brief explanation of a model illustrating the relationship between elements of a story:

S  
s

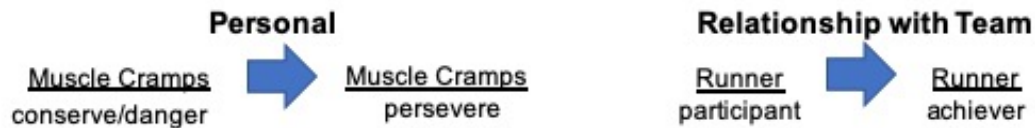
The capital 'S' represents the physical element, and the lowercase 's' represents the meaning that the speaker wishes the audience to infer. 'S' representing signifier, and 's' representing what is signified (Olsson, 1991, p173). In the

context of stories, the large S represents words communicated, with the little s representing the meaning of those words. Another example further illustrates the concept:

Dog  
Loyalty

‘Dog’ in this example is a tangible thing, an animal that most can readily identify. What that dog signifies, on the other hand, could greatly vary from person to person. A large dog could invoke feelings of security in some, or fear in others. The dog could manifest feelings of loyalty (as the speaker intended), or represent an increase in responsibility for someone daunted by the amount of training and attention a dog requires. Anyone could share the word dog with an audience, this is tangible and measurable – either it was shared or it was not. It is far more challenging to communicate ‘dog’ in a way that evokes the meaning of loyalty in the audience. The thin line between the two, signifier and signified, represents the delicate balance, and the power that storytellers possess.

During that race in my junior year I flexed that power in my mind, changing my personal narrative and also my relationship with my team. When I began that race, running for me represented a workout, a hobby, something to do to pass the time and keep in shape. Muscle cramps previously meant a signal to slow down and conserve, to retreat. Muscle cramps in the new narrative became a catalyst, a springboard, a signal to push forward and achieve more. In doing so, my relationship with the team also changed:



My story shifted from team member to achiever, and with it my role moved from seat-filler to one that could be counted on. In applying the lens Olsson provided I recognize the impact of these developmental moments, and their influence on my future leadership interactions. By exercising my power to change my personal narrative, I had achieved greater results and enhanced my relationship with the larger organization.<sup>22</sup>

Organizations can also benefit from changing the narrative with their employees, as witnessed in person during another experience with Organizational Dynamics colleagues in Prague in 2010. Our group toured the TPCA manufacturing plant in Kolín, Czech Republic - a joint venture that manufactured automobiles under the Toyota, Peugeot, and Citroën brands for the European market. We observed workers building cars along the assembly line during active production. At one point an instrumental song could be heard over the loudspeakers, and a section of the line came to a stop. The song playing was “Pop Goes the Weasel,” a whimsical tune that seemed more at home in the daycare section of the plant than the manufacturing floor, but our tour guide assured us that was intentional. Researchers from Toyota were concerned at the number of defects that went unreported in the assembly line. Defects that

<sup>22</sup> This would later go on to inform my leadership style – providing a foundational affirmation that people can achieve great things with the right level of attention and motivation.

progressed further down the line had exponential consequences in terms of time lost stopping and re-starting production. Early detection was key, prompt reporting was necessary, but workers were less willing to press the button that stopped production and triggered a harsh alarm to sound.

Pressing the button was unpleasant for the workers. Transforming the alarm to a children's song changed the connotation of the act from a negative experience to a positive one. Workers more readily pressed the button, often could be seen laughing as the silly song played, and began to report more defects earlier in the process. Engineers had more production data and could make changes to help minimize defects, and increase daily production totals. TPCA paid close attention to the workforce perceived the alarm (signifier), and was able to shift the signified meaning of the defect reporting process and elicit a positive response. The results in the manufacturing process, much like the results in my running example, directly improved following the shift in attitudes.

Recalling these experiences was essential to fuel my change in approach, as I (at times aware, and at times subconsciously) worked to bring balance to the approach to my sabbatical as Covey suggested. (Covey, 2004, p302) I needed to de-program myself from a prior method of operation, to change my personal narrative to allow forward progress, growth, transformation all to take place. Running was an important part of that process.

It is the primary exercise method to improve my health, avoid weight gain, and counteract poor dietary decisions. As my career and my personal life saw

increases in scope and responsibility my running habit evolved alongside into a mental, and sometimes spiritual, escape.<sup>23</sup>

Physical stamina improved and I found myself less reliant on external stimuli, most notably music, to get me out and keep me going. Trail running especially affords a chance to explore new terrain and keep the muscles and body from becoming stale due to repetition. Add in the challenge of hills, rocks, roots, stumps, unpredictable footing, and it's a stimulating environment. Without music it also becomes a great time and place to think. While remaining upright the mind is left free to roam. Running has a cleansing effect on many levels; exercise to promote improved physical health, bolstered mental health by achievement via tracking progress, and time to think and process to help clear the mind. Even when not in pursuit of a long-distance goal or race, just going for a run is an excellent way to be alone with my thoughts. A gateway to reach a flow state, or pursue enlightening experiences much like I had in Aspen.

Knowing that I would have the time to devote to the rigorous training demands, I registered to run the Marine Corps Marathon coincidentally held on my 39<sup>th</sup> birthday in October 2019. I planned to customize a training program by

<sup>23</sup> There are many works that tout the benefit of exercise and cognitive function. One article published in the *Psychonomic Bulletin & Review* suggests that regular exercise has the potential to improve cognitive function, even in healthy populations. Running is my exercise of choice, and the article offers that

“A review of research on the cognitive-boosting effect of aerobic exercise (which in many studies was either running, jogging, or brisk walking) found that for children, running improved working memory and focus. For young adults, working memory saw a similar boost — as did task-switching ability.” (Guiney, 2019)

I often find that the act of going for a run would help clear my mind, provide time alone with my thoughts, and I would return to work on whatever problem I had with renewed vigor. Running provides the enhanced task-switching ability I need to be successful across multiple endeavors.

blending a few different sources, and followed a weekly plan for the 18-20 weeks leading up to the race, as had proven effective for other races I trained for. Contrary to my previous experiences, I started to have discomfort in my right knee in a few months before the race. I consulted a physical therapist, also a close friend, for an evaluation and ultimately a treatment plan. My severe inflexibility was mostly to blame, treatable through a daily stretching regimen and a few weekly office visits. Initial progress was maddeningly slow, taking a mental and emotional toll as I worked through things, exercising patience along with my muscles. The slow recovery meant less running, which meant I quickly fell behind my training plan. Another vicious cycle ensued; it was hard to motivate myself with a lack of physical progress. Running was my job at the moment, and I was failing at my job, not a feeling I was accustomed to dealing with.

The friendship and openness I shared with my physical therapist often meant that our sessions became a combination of physical and emotional therapy. We would talk business, child-raising, and she would help me sort out the mental and physical aspects of my recovery. Mutually rewarding and entertaining. As we entered August, progressing slowly, with race day and high-mileage training runs looming, she made a dire observation. She said we would soon reach a go/no-go decision point and my participation in the race was in jeopardy. Sensing my obvious horror at that potential outcome, she made a comment in passing that would continue to resonate with me, "You know Zach, you're still a good person if you don't run this race." I had not thought about it in that context, and her words had a profound impact.

Why was I running this race? Partially to exercise, partially to be in better shape, but perhaps most importantly (and least apparent to me) was my need to have a measurable accomplishment. Something difficult, something significant, something else to justify my time spent not working. If I run the race, and if I achieve a personal record (PR) in that race than this was all worthwhile. I was not willing to accept less than that – less meant that I did not put my best effort forward, that I had somehow squandered part of my sabbatical. I found some solace in a phrase from the Dalai Lama “Our mind is the axle that often determines whether we experience the ride as bumpy or smooth,” as I wrestled with conflicting emotions and tried to remain positive. (Abrams, 2016, p88) In comparison, the axle the Dalai Lama referenced appeared similar to the bar in the model provided by Olsson, another metaphor for the power of the storyteller to alter the meaning of the tangible in a way that supports the narrative as they wish. I felt powerless at times to regain control of this narrative, and these struggles had physical and emotional impacts.

### **Identity Challenge**

The end of the summer tossed another curveball that disrupted end-of-season plans with the family. My youngest son developed an eye irritation that required multiple follow-ups with specialists. The worst part – no swimming or sand exposure for the remaining summer weeks. Trying to avoid our obvious disappointment, and bolster his spirits, we had to creatively adapt our trip and outdoor activity plans. It also meant a lot of daytime medical appointments.



Given the freedom of my schedule, I attended most of them. Midweek, during the standard workday, timing did not matter – we went when the doctor was available. At first no one seemed to bat an eye that me, his father, clad in my unofficial summer uniform of shorts and flip flops, was bringing my son to his appointments; schedules, dress codes, attitudes are all relaxed during the summer months. With the arrival of fall, and with it the shackles of a structured elementary school schedule, I noticed a different undercurrent.

At first, I brushed it off as over-thinking on my part, when a receptionist casually said ‘Oh’ to my response that I was very flexible during the week when it came time to choose the next follow-up appointment. Something in her tone and admitted surprise gave me pause. Maybe it was a judgement on her part, maybe she felt I should be less available due to the demands of my job; that somehow my flexibility meant I was slacking when I should be working harder. Equally possible that I was over-thinking this, and that there was nothing deeper to her comment than genuine surprise that someone might actually have a flexible schedule. Regardless, I felt as though I was being judged unfairly, as if it was somehow not socially acceptable for me to be free from occupational obligations.

Likewise, it felt strange to be one of few males shopping for groceries mid-day, midweek. In three consecutive weeks there were no other males close to my age in group exercise classes I attended at the YMCA. I started paying more attention to these nuances, eventually almost snapping at a contractor during a conversation regarding a potential house project. In similar fashion I mentioned that I had a lot of flexibility during the week, to which he replied ‘Oh, are you off?’

and I had to exercise great restraint to not shout back at him. I wanted to say that I was off EVERY day, that I was having an amazing experience not working, but I held back. Later that evening I started to think through these feelings more deeply – why did this seem to bother me so much?

Were people actually judging me, disapproving of my current state, or was this me projecting my insecurities on others? After all, this is a more progressive time with more males taking an active parenting role. I know families where the wife works and her husband stays home to care for the children, mutually beneficial to everyone. Other families balance the parenting duties with the ambitious career goals of both partners in balance. This is not uncommon. The role of the provider is not pre-determined by gender, and public opinion is more in favor of governments & companies increasing support to enable fathers to have a more active role in childcare.<sup>24</sup>

When I was in Sweden with the MSOD program in 2009 I observed many fathers out and about during the day, wandering the streets and parks of Stockholm, particularly the trendy southern island of Sodermalm. Dads with strollers, dads with kids getting coffee, dads with kids congregating with other dads with kids. Sweden implemented a parental leave policy in the 1970s, but it was greatly underutilized until the government increased the incentives for fathers to avail themselves of the program in the mid-1990s. In 2010, less than

<sup>24</sup> The Business Journals reported in February 2019 that 40% of US employers were now offering paid parental leave, up from 25% in 2015. (Stych, 2019) This positive shift in the US is promising, at the same time it lags behind other developed nations.

one year after my own observations, 85% of Swedish men took parental leave. (Benhold, 2010)

The initial aim of the Swedish program was to improve women's ability to join the workforce. Sweden is a pioneer in this effort, and other large industrial nations followed suit. Germany, with a population greater than 82 Million in 2010, witnessed an increase in fathers taking paternal leave from a perennial 3% to more than 20% in 2007. A tremendous side benefit occurred with shifting attitudes amongst men. As the New York Times shared "many men no longer want to be identified just by their jobs." Still others were emboldened by this new policy, and as one father put it "now men can have it all – a successful career and being a responsible daddy ... it's a new kind of manly. It's more wholesome." (Benhold, 2010)

I shared similar thoughts with the birth of my own children, in 2010 and 2013, but my company in the US had no such policy. I was more focused on continuing to provide for my family in the best way I knew how – to work hard at my job while doing my best to share parenting duties with my wife so that we could both be working professionals and parents. Nevertheless, in 2019 I felt very strongly aligned with fathers in Sweden from a decade earlier. I did not want to be solely identified by my occupation, yet I found myself struggling with my identity now that full-time employment was absent from my life. I wanted to be an active and engaged father in my sons' lives, but difficult to embrace as my sole function, without an accompanying occupation. This and the concept of paternity

leave made sense in principle but seemed to be a struggle for me to accept in practice.

### **Back to School**

Mirroring my maturation as a student was the evolution of a more sophisticated perspective on the balance of priorities at work and outside of work.

The concept of balance has always been important in my life – consistently working hard and playing hard, and maximizing my vacation allowance. Skiing, fishing, traveling with family and friends; all while achieving sales results, coaching, building teams, growing revenue, leading by example. The busier I am the better I am, in all aspects of my life. Slow is boring, and I'm not good at it. Times when I found myself single-threaded, boredom manifested along with challenges to my personal motivation. In the words of my father, on his final day of a successful 37-year career with the same company, "They always got their 40 (hours)". Or 50, 60, 70, whatever it took. A stalwart of my own work ethic ever since, although adapted slightly my mantra became "work hard so you can play hard." Balancing the priorities of business, leisure, and family evolved into a passion. I led by example, routinely demonstrating for my employees and peers that a balance was important, and also yielded positive results across the board. When there was an imbalance, stress typically followed, as I had experienced for the past few months. In an attempt to regain this balance I increased my academic focus, and my scholastic pursuits take a more prominent role in the story.

Personal imbalance contributes to organizational performance. Employers increasingly recognize this trend, and some employ creative tactics to help employees balance multiple priorities to achieve greater business productivity. This was one of the many human capital management trends I studied, and just one example of how employers can engage with employees in a more meaningful way. Mouriño (2017) offers that “leaders should move from asking the questions ‘How can I get the most out of my employees’, to ‘What can I do to help my employees be more effective and engaged?’” (p41). Furthermore,

“the process begins with leadership. It requires organizations to transform into becoming a great place to work and not just an organization that says it is one. Ultimately, the culture of an organization is a reflection of the personalities of its leaders. This means that organizations will need to not only ensure they are developing leaders to ensure that their employees feel valued, developed, and appreciated, but also to maintain practices that support this belief.” (Mouriño, 2017, p42)

One practice that employers are implementing to improve employee engagement is experimenting with the traditional work week.

Early adopters provide some encouraging trends with shortened work weeks. One example comes from a software development company in Boulder, Colorado, that piloted a “Flexible Friday” program to allow employees the opportunity to not work on Friday, with the contingency that weekly work goals were accomplished. It started over a summer, a historically slower time, with company leaders evaluating each quarter to determine business and employee

impacts. One employee (also a member of the Aspen trips cohort) shared her positive experiences with the program. On her team, members rotate an on-call person on Fridays in the event a time-sensitive business need arises. Some on the team used Friday for innovation, personal development, online classes – things that helped improve their skillset and impact in their current role, and also things that historically were a challenge to fit into the standard work week. Others took advantage of the time for physician appointments, volunteering, household errands, or outdoor recreation. The program did not work for every team – Sales for example had to be available more frequently based on the customer needs, but those that took advantage found themselves much more productive Monday-Thursday. Disruptions were minimized since Friday could be used for scheduling appointments. The shortened work week also placed a greater emphasis on being productive so the company also launched a complimentary initiative to improve meeting effectiveness. Workgroups guarded time much closer than before and work time viewed as a more precious resource that should be used efficiently. Working smarter had an immediate weekly benefit of increased personal time, and was proven a powerful motivator.<sup>25</sup>

Similarly, New Zealand-based company Perpetual Guardian partnered with Jarrod Haar, professor of human resource management at Auckland

<sup>25</sup> The trial is not without hiccups – in September 2018 the company had a major event, needed to amend the policy, and for one-month employees reported to the office on Fridays. It was a minor inconvenience, but a majority understood the need and did not object. At the end of the month the company reverted back, and continued Flexible Fridays indefinitely. The program is still in its early stages, and there is no hard data collected yet on employee retention. Nevertheless, many employees have expressed that they could not imagine leaving, even for increased pay, and giving up the Friday benefit.

University of Technology, to conduct a study amongst employees after trialing a 4-day work week March-April 2018. The study found job and life satisfaction increased on all levels across the home and work front, with employees performing better in their jobs and enjoying them more than before the experiment. In November last year just over half (54%) of staff felt they could effectively balance their work and home commitments, while after the trial this number jumped to 78%. The trend is also supported by Ankur Shah, a serial entrepreneur who founded slipper brand Mahabis in 2014, who offers that giving workers a day off every week has had no effect on his plan to increase revenues to £20m within three years. “When I started this business,” he said, “we used [the four-day week] from the outset to allow people to focus on the work they do, not the time they spend.” (Roy, 2018) The early gains from a flexible schedule are promising, and the data is an important bellwether for improved employee engagement as the trend is adopted across more companies and industries.

The gains being experienced by policy advances are being felt across multiple companies, industries, and organizations – and human capital strategists must continue to work to connect the employee engagement gains with financial and productivity gains to the larger organization.<sup>26</sup> Balance is an important part to this equation, and my personal journey and struggles with balance parallel

<sup>26</sup> Balance is important to the employee/employer relationship, and organizations that help individuals improve this balance will experience better outcomes. Spiritual leader Dalai Lama has spoken at length on the importance of joy and positivity, and offers this in comment of the connection between employee satisfaction and organizational performance:

“Many Japanese companies are very successful because of the relationship between the employer and the employee. The employees have the feeling that ‘this is my company.’ So they work whole-heartedly ... If you build the real concept of working together, and the profit is shared together, then real harmony develops.” (Abrams, 2016, p269)

challenges organizations are facing. My refocused energy on academics has helped me better understand this connection.

### **Self-Awareness**

My experiences through the Organizational Dynamics program have helped prepare me for the developmental journey I have been on. A few versions of self have emerged throughout my journey, and one of the benefits of being engaged in the program as long as I have is that I have undergone multiple transformations along the way. As previously mentioned, multiple frameworks and points of view have both influenced me at times, and provided rear-view mirrors to help understand what may have been affecting me at a given time. The primary benefit of this reflection is the ability to strategize more effectively to tackle future challenges. To demonstrate this, I revisit a few ideas introduced at the onset.

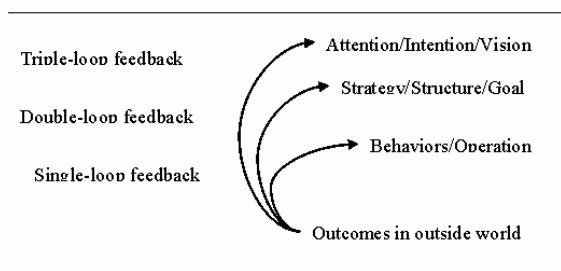
Systems theory manifested from a macro perspective in a number of areas. Intertwined across all threads is the concept of equilibrium, and the thought that actions taken (or not taken) in one area can manifest as changes or impacts to other areas in a larger system. Torbert (2004, p19) also helped illustrate single-loop and double-loop feedback as different territories of experience. My experiences in the moment, reacting to the feedback (single) and developing strategies to improve performance (double) have ultimately led to an enhanced vision of myself (triple) moving forward. This is what I mean when I say I am better equipped to handle new challenges – my vision of myself has expanded. Building upon that, my attention has also improved, and I am more



aware of my intentions given certain triggers. In many ways I have approached this personal journey of discovery in a similar fashion to my approach to running a race. What has evolved beyond the strategy and planning is a deeper understanding of why I run, the benefits it provides me, and how it affords me a vision for the future. The diagram below helps illustrate the relationship between these experiences:

Figure 2 (Torbert, 2004, p19)

**Single-, double, and triple-loop feedback and  
Four territories of experiences**



Another framework that helps explain the interactions of personal and professional change is the concept of action inquiry espoused by Bill Torbert, and the related concept of action logics. Building on the multiple feedback loop concept, action inquiry centers on a process of learning. “This learning process is not a mechanized, automated feedback process producing continuous change, but is instead a bumpy, discontinuous, sometimes upending, and transformational kind of learning.” (Torbert, 2004, p89) My own experience with action inquiry mirrors Torbert and afforded a “widening and deepening vision and new capacities for learning from single-, double-, and triple-loop feedback in the moment of action.” (p91) This concept of action inquiry as a form of learning integrates the development of self at key increments, known as action logics,

defined as “an overall strategy that so thoroughly informs our experience that we cannot see it (p66) During particular moments in our lives we are bound by certain action logics.

Expanding, if we can become aware of these limits, we can reduce unintentional conflict and misunderstanding. Organizations are full of people operating under different action logics, and being able to recognize and understand what may constrain others is a critical step in improving working relationships. Discussions on action logics center on forward development, however it is possible for people to regress at times. Much of my story to this point shares the interactions between action logics as I grapple with the thoughts, feelings, and reactions of my own transforming decisions.

My recent journey through the neutral zone can be characterized as one seeking enhanced meaning, growing beyond my inclination at the onset to seek validation that the path I have chosen is the correct one. Colonna is onto something – and being lost is part of *my* path. My journey is something to be embraced for the learning and developmental impacts, not something to be shunned or dismissed as failure to make forward progress. All of the steps on the journey, regardless of direction, influenced the eventual place I now find myself in.

The personal growth I experienced was not in spite of the challenges and conflict, but directly influenced by them. To further understand this conflict and resultant growth I lean on Torbert’s expanded view of Action Logics, and the practice of action inquiry. “The promise of action inquiry is a new kind of power –

transforming power – which, paradoxically, emanates from a willingness to be vulnerable to transformation oneself.” (Torbert, 2004, p8) Throughout my journey across this neutral zone I was growing beyond the Individualist and starting to embrace the role of Strategist. The resultant transformation is not possible without my own willingness to be vulnerable, to change my personal narrative, in order to experience personal transformation.

Table 1. Seven Ways of Leading (Rooke & Torbert, 2005)

Action Logic	Characteristics	% of Leaders	Effect as Leaders
1. Opportunist	<i>Wins any way possible.</i> Self-oriented; manipulative; “might makes right.”	5%	Significantly less effective at implementing organizational strategies
2. Diplomat	<i>Avoids overt conflict.</i> Wants to belong; obeys group norms, rarely rocks the boat.	12%	
3. Expert	<i>Rules by logic and expertise.</i> Seeks rational efficiency.	38%	
4. Achiever	<i>Achieves goals through teams and with appreciation for outside forces.</i> Juggles managerial duties and market demands.	30%	Effective manager. Action & goal oriented.
5. Individualist	<i>Integrates competing personal and organizational goals.</i> Creates unique structures to resolve gaps in motivation, strategies and performance.	10%	Consistent capacity to innovate and transform organizations.
6. Strategist	<i>Generates organizational and personal transformations.</i> Exercises the power of mutual inquiry, vigilance and vulnerability for both the short and long	4%	
7. Alchemist	<i>Generates social transformations.</i> Integrates material, spiritual and societal transformation.	1%	

Tackling this capstone project helped propel me forward in my journey across the neutral zone. I began to make sense of the meandering nature of my journey. This would be my third attempt at completing the project, at putting pen to paper to create something that represented the culmination of years of study mixed with practical application. In prior attempts I mistakenly thought I needed a silver-bullet idea, something new and unique that no one had thought of before, my gift to the world. With nothing apparent, my early attempts represented a

start-stop approach and never really gained momentum. With my second attempt I employed more measures – accountability partners, similar to the workout buddies I leveraged in my race training – to help keep me on task. I asked a few people close to me to create deadlines, have check-ins, to apply healthy pressure to keep me on task. These measures produced a similar result. I had some topic ideas but lacked the passion, the fire, to bring these to light. I rebelled against the system I tried to put in place. It was hard to admit this, but looking back I think the early attempts failed because my approach to the project viewed the end result, a diploma, in the same way as I had viewed compensation in my former workplace.

Only this time I was on both sides of the equation. I was both employer and demotivated employee. I wanted to get it done, complete the project, earn my credential, so that I could move on and pursue my next great thing. As I pointed out before, similar to feelings of burnout felt by ER medical professionals, Navy sailors, and my teams in an ever-shifting business landscape – the lack of engagement produced poor motivation and a dip in performance. Similar to the experiences I had while training & running for races. In almost every example I was lost along the way, and frustrated with my plan.

I thought the only way I could tell this story was if I had a well-executed plan with documented success and an unflapping trajectory up-and-to-the-right. A traveler on a steady trajectory would not have meanderings, would not be lost emotionally along the way, as I found myself at times. I thought that I had to personify this ideal of traveler, and that I should ignore the emotions distracting

me from getting the job done. After all, myself as the employer thought that myself as the employee should just be happy with the compensation for the work done (diploma) and that I should just work hard to complete that task. Thankfully Colonna helped me recognize, as aforementioned, that being lost could be PART of the path, and that I had an outdated view of work:

“Aliveness comes from living a life of personal integrity in which our outer actions match our inner values, beliefs, wishes, and dreams. Work – our careers, our professions, our jobs – is neither the blissful expression of deep purpose nor the dreadful obligation that stands in the way of being ourselves.” (Colonna, 2019, P160).

The emotions were warnings signs that I was not producing my best work. This realization, along with guidance and encouragement from my trusted advisors, gave me the courage to look at this journey as the story itself, to tell the story in a way that welcomed readers onto my path of self-discovery. Asking questions of myself throughout the journey will make me a better leader, as Colonna reinforces:

“the leader best able to cut through the miasma of confused and conflicting emotions, to answer such questions and see the nature of the reality of the organizations’ triumphs and struggles is best able to calm and care for the herd.” (p230)

Adding to that, I see wisdom in a declaration from Desmond Tutu that “Courage is not the absence of fear, but the ability to act despite it.” (Abrams, 2016, p94) The path did not need to be perfect – in reality the lessons learned and applied,

successes, failures, struggles, questions asked – the interaction of all of these made for a far richer story. Most importantly it was my story, and one that I wanted to tell.

### **Embracing the Path**

This capstone project undoubtedly enhanced my awareness of self. I entered the program intellectually curious, seeking answers that would help advance my career and increase my positive contributions. I often joked that I started my journey because “I did not yet know what I wanted to be when I grew up” – spoiler alert – I still don’t. What I do know, is that the gift of this program has been the introduction of topics, skills, thoughts, concepts, people; all that have pushed and challenged and changed me in ways I did not know existed before my first day back in the classroom.

This story offered multiple points of view. There were times I was acutely aware of what was happening around me, when I actively employed strategies and techniques honed to combat and overcome new challenges. At other times I reflected back, viewing my journey from analytical lenses, trying to make sense of why I reacted a certain way at a particular time based on the triggers. It was during those times that the real learning, the real transformation, took place. Throughout the process one thing should be apparent: I am a holistically better person at this point in the journey than when it started. The capstone journey catalyzed me to accept the courage to leave this neutral zone and embark on a new and exciting adventure. It also made me recognize the value of the neutral zone, the value of the transformational experiences resulting from travel along

the path. The project does not represent an end, as I misled myself to believe at times. The telling of this story represents another chapter in my journey, a new beginning, one that I am now ready and willing to embrace. It is my hope that this story will encourage and inspire others to take a step on a new path and be willing to be lost along the way.

A good fishing trip is not measured solely on the number of fish landed, a run can be enjoyable without a PR, a profession is not only as good as the paycheck, and a personal transformation is more about the journey than the ultimate destination. Embrace the path.

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## APPENDIX 1 – Strengthsfinder: Significance

# STRENGTHSFINDER®

### Significance

You want to be very significant in the eyes of other people. In the truest sense of the word you want to be recognized. You want to be heard. You want to stand out. You want to be known. In particular, you want to be known and appreciated for the unique strengths you bring. You feel a need to be admired as credible, professional, and successful. Likewise, you want to associate with others who are credible, professional, and successful. And if they aren't, you will push them to achieve until they are. Or you will move on. An independent spirit, you want your work to be a way of life rather than a job, and in that work you want to be given free rein, the leeway to do things your way. Your yearnings feel intense to you, and you honor those yearnings. And so your life is filled with goals, achievements, or qualifications that you crave. Whatever your focus-and each person is distinct-your Significance theme will keep pulling you upward, away from the mediocre toward the exceptional. It is the theme that keeps you reaching.

#### Significance Sounds like this:

Mary P., *healthcare executive*: "Women are told almost from day one, 'Don't be too proud. Don't stand tall.' That kind of thing. But I've learned that it's okay to have power, it's okay to have pride, and it's okay to have a big ego. And also that I need to manage it and drive it in the right directions."

Kathie J., *partner in a law firm*: "Ever since I can remember I have had the feeling that I was special, that I could take charge and make things happen. Back in the '60s I was the first woman partner in my firm, and I can still recall walking into boardroom after boardroom and being the only woman. It's strange, thinking back. It was tough, but I actually think I enjoyed the pressure of standing out. I enjoyed being the 'woman' partner. Why? Because I knew that I would be very hard to forget. I knew everyone would notice me and pay attention to me."

John L., *physician*: "All through my life I felt that I was onstage. I am always aware of an audience. If I am sitting with a patient, I want the patient to see me as the best doctor he or she has ever had. If I am teaching medical students, I want to stand out as the best medical educator they have ever had. I want to win the Educator of the Year award. My boss is a big audience for me. Disappointing her would kill me. It's scary to think that part of my self-esteem is in other people's hands, but then again, it keeps me on my toes."

## APPENDIX 2 – Strengthsfinder: Ideation

# STRENGTHSFINDER

### Ideation

You are fascinated by ideas. What is an idea? An idea is a concept, the best explanation of the most events. You are delighted when you discover beneath the complex surface an elegantly simple concept to explain why things are the way they are. An idea is a connection. Yours is the kind of mind that is always looking for connections, and so you are intrigued when seemingly disparate phenomena can be linked by an obscure connection. An idea is a new perspective on familiar challenges. You revel in taking the world we all know and turning it around so we can view it from a strange but strangely enlightening angle. You love all these ideas because they are profound, because they are novel, because they are clarifying, because they are contrary, because they are bizarre. For all these reasons you derive a jolt of energy whenever a new idea occurs to you. Others may label you creative or original or conceptual or even smart. Perhaps you are all of these. Who can be sure? What you are sure of is that ideas are thrilling. And on most days this is enough.

### Ideation Sounds like this:

Mark B., *writer*: "My mind works by finding connections between things. The other day I was hunting down the Mona Lisa in the Louvre museum. I turned a corner and was blinded by the flashing of a thousand cameras snapping the tiny picture. For some reason I stored that visual image away. Then I noticed a NO FLASH PHOTOGRAPHY sign, and I stored that away, too. I thought it was odd because I remembered reading that flash photography can harm paintings. Then about six months later I read that the Mona Lisa has been stolen at least twice in this century. And suddenly I put it all together. The only explanation for all these facts is that the real Mona Lisa is not on display in the Louvre. The real Mona Lisa has been stolen, and the museum, afraid to admit their carelessness, has installed a fake. I don't know if it's true, of course, but what a great story."

Andrea H., *interior designer*: "I have the kind of mind where everything has to fit together or I start to feel very odd. For me, every piece of furniture represents an idea. It serves a discrete function both independently and in concert with every other piece. The 'idea' of each piece is so powerful in mind, it must be obeyed. If I am sitting in a room where the chairs are somehow not fulfilling their discrete function-they're the wrong kind of chairs or they're facing the wrong way or they're pushed up too close to the coffee table-I find myself getting physically uncomfortable and mentally distracted. Later, I won't be able to get it out of my mind. I'll find myself awake at 3:00 a.m."