Newcastle University

Faculty of Humanities and Social Sciences

EVALUATING A LEADERSHIP COACHING SYSTEM

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ABSTRACT

In recent years, we have witnessed a veritable explosion in leadership training and in management coaching. Despite these two trends, research on leadership coaching methods and their usefulness remains scarce. As a practitioner of leadership communication coaching for the past ten years, my research interest stems from a desire to explore and evaluate the effectiveness of such coaching endeavours.

Thus, the overall goal of this research is to perform a formal study to test, and to generate hypotheses about, a coaching system I had been using for several years before the research began. This coaching activity involves teaching leaders to communicate and inspire others.

To achieve this goal, a comprehensive review of the literature was conducted, in order to demonstrate the theoretical basis that underlies the coaching methods. Next, I structured three longitudinal, in-depth case studies in which I was simultaneously researcher, coach, and change agent. Three diverse leaders, personalities, and companies were chosen. As a primary data source, I kept extensive coaching notes, and I recorded frequently the impressions and observations of the three leaders. For triangulation, I used both solicited and unsolicited commentary of employees, clients, board members, and other key observers. The research was aided greatly by the extraordinary access and the frequent contact I enjoyed with many of these individuals at each of the companies.

Results of the research were twofold. First, the three cases confirmed the legitimacy and effectiveness of the system of coaching in question. Second, in comparing the three cases, conclusions were drawn and hypotheses generated concerning the factors that contribute to the success of the coaching methodology. While each the three leaders benefited form the coaching, the research sheds light on why the system is more useful and productive in some cases than in others.

Keywords: leadership, coaching, storytelling, authenticity, personal stories

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1. INTRODUCTION

The overall goal of this research is to perform a formal study to test, and to generate hypotheses about, a coaching system I had been using for several years before the research began. This coaching activity involves teaching leaders to communicate and inspire others, using as a base authentic personal stories. As such, I structured the research around three case studies in which I was both researcher and change agent.

In this introductory chapter, I lay out the general plan for this dissertation, briefly describing the role and the contents of each of the chapters.

Chapter 2 explains the research methodology. I present the research question and discuss how I came to formulate it. In addition, there is a brief discussion of the concept of "action research", and an explanation of why it constitutes an appropriate vehicle for this type of research question.

Chapter 3 explores the literature behind the underlying concept of this thesis—that leaders can use storytelling—and most particularly authentic autobiographical stories—with great effect in influencing others. This chapter builds the theoretical base to explain why narrative in general is a powerful form of expression in a variety of contexts, and why people who seek to influence others (leaders at all levels of organisations) should tap into their power. In addition, we explore the reasons that storytelling may have a bad reputation in some circles, and thus why the telling of personal stories remains underutilized as a communication tool in organisations.

Through an examination of the literature, we demonstrate that stories are powerful vehicles for reaching others, for four basic reasons. First, they are powerful in reaching others because they are universal and can thus reach anyone. Storytelling is simply part of the shared human experience; all human beings identify with classic stories and know their patterns. Second, stories are central to identity; they are the way individuals and groups define themselves. Stories of identity bond groups together and provide individuals with a sense of purpose. Third, human beings think and organise their lives in story form, so

story-based discourse "glides" effortlessly into the human mind. For this reason, the most effective leaders teach individuals and organisations through their stories. Finally, numerous sources point to story as the most effective way to communicate with and inspire others.

In chapter 4, I describe the coaching system I have designed and developed over the past 10 years, and its philosophical and theoretical underpinnings. There is an ongoing discussion of the literature that supports the coaching techniques and methods I have discovered and come to use. In addition, we follow the case of Tim Bilodeau, founder and CEO of Medicines for Humanity. Many of the illustrations follow Tim and explain his progression at various junctures of the system.

Chapter 5 consists of two additional case studies that provide further evidence and examples. As is the case with Tim Bilodeau, the two studies presented here are in-depth and longitudinal, following the entire coaching process over periods of 3 to 4 years. In the cases of Nilesh Nanavati and Nick Heys, one sees examples of how the coaching process unfolds. These cases also provide additional data for evaluating the effectiveness of the coaching system.

In Chapter 6, I present the overall conclusions from the case studies (6.1) and the implications for management (6.2). Since I present ongoing commentary, analysis, and conclusions throughout the previous two chapters, chapter 6 limits itself to a "big picture" analysis of some of the broader implications and lessons from the three case studies. In addition, I discuss the limitations of this research (6.3) and the implications for further research (6.4).

2. RESEARCH METHODOLOGY

2.1 OBJECTIVES OF THE RESEARCH

The research objective is to do a longitudinal study of a system of leadership communication coaching, a system based on developing the client's self-awareness and self-expression. Can leaders be coached to use authentic autobiographical stories to motivate, influence and engage others? How can these authentic stories help establish a leader's credibility and worthiness to lead, and help him find his leadership "voice" to inspire and align groups?

I believe that the coaching systems and methods presented in this document will contribute to the body of research about leadership communication and about coaching in general. My overall goal is to test these methods with case studies, to shed some light on the practice of leadership coaching, and to break some new ground in the field. In addition, this document will offer a model for all those who seek to learn and practice authentic, inspirational storytelling—even in the absence of a coach.

2.2 ACTION RESEARCH

The research project was designed as part of a conscious effort to develop, codify, and evaluate a leadership coaching system that I had been using—at least partially—for several years before this project began. As this coaching method is explained in considerable detail in chapter 4, I will only state here that it is based on training the leader in self-understanding, self-expression, and autobiographical storytelling. The subjects of the cases studies are three leaders whom I was in the process of coaching; in each case, the

goal was to transform the individual's communication skills and effectiveness.

Since both the coaching and the research were characterized by integral and longitudinal involvement, and since the researcher was also expected to be an agent of organisational change, we are squarely in the realm of what the literature terms "action research". The concept of action research first appears in academic texts in the 1940s. Ketterer et al. (1980) consider Collier's (1945) study of American Indians as an early example of action research. Many credit Lewin (1946, 1947) with having been the first to use the term in his own writing (Eden and Huxham, 1996). Some of Lewin's previous studies, for example his work on encouraging the use of meat entrails in everyday cooking (1943), apply social science knowledge and methods that would later be considered action research. Eden and Huxham (1996) point to Lewin's research as breaking new ground in two arenas: (1) it sought to change behaviour, and to record the outcomes of attempting to do so, and (2) it recognized that the researcher was visible and expected to have an impact on the experiment.

While the term action research has been in use for more than six decades, finding an exact definition is difficult. In their lengthy article, Eden and Huxham (1996) evade the definition issue, choosing instead to enumerate fifteen guiding characteristics, and to explore the "nature and boundaries" of action research. Several authors make the simple point that action research is a type of case study that has become increasingly prominent (Denzin and Lincoln, 1994, Gummesson, 1991, Miles and Huberman, 1984, Strauss and Corbin, 1990) Bryman (1989 p. 179) calls it a 'special kind' of case study. Easterby-Smith et al. (1991 p.8) admit some malaise about formal classification of action research, stating that the term sometimes regroups methods that scholars have difficulty defining, approaches that "do not fit neatly into the...categories".

Although there is some divergence and disagreement about the formal definition of action research, most agree, according to Herr and Anderson (2005), on the following: action research is an inquiry that is done by or with participants but never to or on them. It is a reflective process, but is different from isolated, spontaneous reflection in that it is deliberately and systematically undertaken and generally requires some form of evidence be presented to support assertions. It is oriented to some action or cycle of actions that participants have taken, are taking, or wish to take to address a particular problematic situation. Similarly, Eden and Huxham (1996 p. 526) avoid precise definition but state

that action research is a participatory, living process characterized by "an involvement by the researcher with members of an organisation over a matter which is of genuine concern to them and in which there is intent by the organisation members to take action based on the intervention." In sum, action research differs from pure case study research or from consultancy-type interventions since it must satisfy the criterion of being *both* action and research oriented.

Thus, despite the vagueness about formal definition, two essential points seem to distinguish action research: (1) the relationship between the researcher and the researched and (2) the view that "research should lead to change, and therefore that change itself should be incorporated into the research process itself" (Easterby-Smith et al., 1991 p. 8). The relationship between researcher and researched is one of collaboration, akin to that of a consultant/client. What may be somewhat different than a traditional consulting relationship, as well, is the process. We are not in a classic situation where the client perceives a problem and hires a consultant to solve it, but in one where the two parties "collaborate together in a joint diagnosis and identification of solutions to a particular problem where the emphasis is on bringing about some kind of change seen as desirable by both the researched and the researcher" (McLoughlin, 2001 p. 7). Hence, the process is highly participative and bi-directional, leading to shared understandings and actions.

Numerous discussions of action research stress the importance of the role of ongoing collaboration and reflection—that the learning of the practitioner may change his own behaviour or approach, both in current and future cases. (Easterby-Smith et al., 1991, Elden and Levin, 1991, Reason and Hawkins, 1988b, Weick, 1995) In other words, there is mutual benefit: while the researcher may be considered an expert in his field, action research provides the opportunity to learn and thus to refine and develop his own systems and skills. Eden and Huxham explain (1996 p. 530): "For the practitioners there will be benefits that go beyond the moment of action towards some generality which is related to their expectation of implications for future situations. This circumstance provides the opportunity for collaborative or participatory research."

2.3 CRITICISM AND PRAISE OF ACTION RESEARCH

Since its beginnings, the findings of action research have produced a great deal of mistrust and scepticism, particularly among those schooled in positivist approaches. For example, Critics of Lewin's pioneering work wrote of the difficulties of measuring outcomes and controlling contextual variables using his methodology. (Eden and Huxham, 1996 p.527) Elden (1979) sees action research as yielding valid conclusions but only as "local theory", applying specifically to the context studied, and therefore not replicatable or generalisable.

Thus, action research has been criticised for its lack of methodological rigor (Avison et al., 1999, Lau, 1997, Oates and Fitzgerald, 2001, Yin, 1994). Because action research relies on collaboration and seeks change, participants are likely to learn a lot from the process itself, and their interest may be more in "what happens next" than in a formal account of the research findings. (Easterby-Smith et al., 1991 p.8) According to Avison et al. (1999), it lacks guidelines in term of design, process, presentation, and evaluation criteria. Additionally, Baskerville and Wood-Harper (1998) write that since action research's methodology may be somewhat vague and fluid, there is the potential for introduction of bias.

Despite these reservations and scepticism, there are those who contend that action research is a viable and useful vehicle, even yielding unique benefits in certain situations. As such, Susman and Evered (1978) argue that action research is bound to be found wanting if it is measured against the criteria of positivist science, whereas it is perfectly justifiable from the viewpoint of other philosophies, such as phenomenology. Other students of this type of research assert that studying an organisation longitudinally and writing up the findings as a narrative can be an advantage; it is often through the narrative results that one can demonstrate how understanding changes and develops over time (Easterby-Smith et al., p. 8). Moreover, Eden and Huxham (1996 p. 530) dismiss the concern over context specificity, postulating that "the general theory derived from action research must be applicable significantly beyond the specific situation."

Herr and Anderson (2005) consider that action research is highly effective in cases of collaboration between parties, where each has a stake in the problem under investigation. The cycles of research and action form a spiral in which each cycle increases the

researchers' knowledge of the original problem, and leads to its solution. For Weick (1995), any type organisational sensemaking is a social process that one must study in great depth. This argues for longitudinal, in-depth case studies where the researcher can take the time to understand the corporate environment, its context and constructs. One concludes that, in Weick's world, the single case study and action research are more than justified—they are preferable for understanding certain types of phenomena—the social, the subtle, the deep aspects of a complex organisation.

2.4 CHOOSING THE CASES

The three case studies presented in this dissertation were chosen first for their diversity, the leaders studied having grown up in cultures in three distinct parts of the world. As is evident from the written accounts in chapters 4 and 5, their industry contexts and personalities also differ dramatically. Since one of the prominent criticisms of action research is its context specificity, I felt that choosing a wide range of personalities, industries and situations was important to this study.

Secondly, I sought individuals who had no prior knowledge of and therefore no positive predisposition toward my coaching methods. Typically, clients come to me by way of referral; they have heard about my work or seen its impact on a colleague. In this sense, none of the leaders picked for this study were "typical" clients. As they had never known anyone I had coached previously and did not know the specifics of my coaching techniques, there were no particular expectations or biases.

A third selection criterion was that of my access to company personnel and resources. In all three cases, I had deep involvement with and knowledge of the company and its activities, an involvement that allowed me to query people close to the leader, concerning changes they saw in the subject's behaviour, if any. Since I had come to know company insiders, I hoped that many would provide diverse sources of feedback, both in formal interviews and in their more casual and unsolicited remarks. At all three organisations, employees, customers, advisors, friends, and board members proved invaluable sources of information for me.

2.5 DATA COLLECTION

The primary source of data was my ongoing observation, which I chronicled in extensive coaching notes. Emerson et al. (1995 p. 9) describe this data source as "field notes", explaining that, "field notes are products of and reflect conventions for transforming witnessed events, persons, and places into words on paper." As such, my field notes covered the coaching sessions but also the internal events I was able to witness as an onlooker, participant and "marginal native"—internal meetings, company events, sales calls, or public statements by the leader.

The ongoing reflections of the leaders themselves—whether in interviews with me, in coaching sessions, in our email and telephone exchanges, or in casual conversations—provided a second important data source. Indeed, the observations of the three protagonists constituted a form of continuing self-evaluation and an information source for me as researcher. For example, when each of the leaders made the unsolicited remark that they were more at ease with their messages in front of a group, that they felt a greater connection with audiences and a heightened ability to influence others with their discourse, it was a most meaningful sort of feedback.

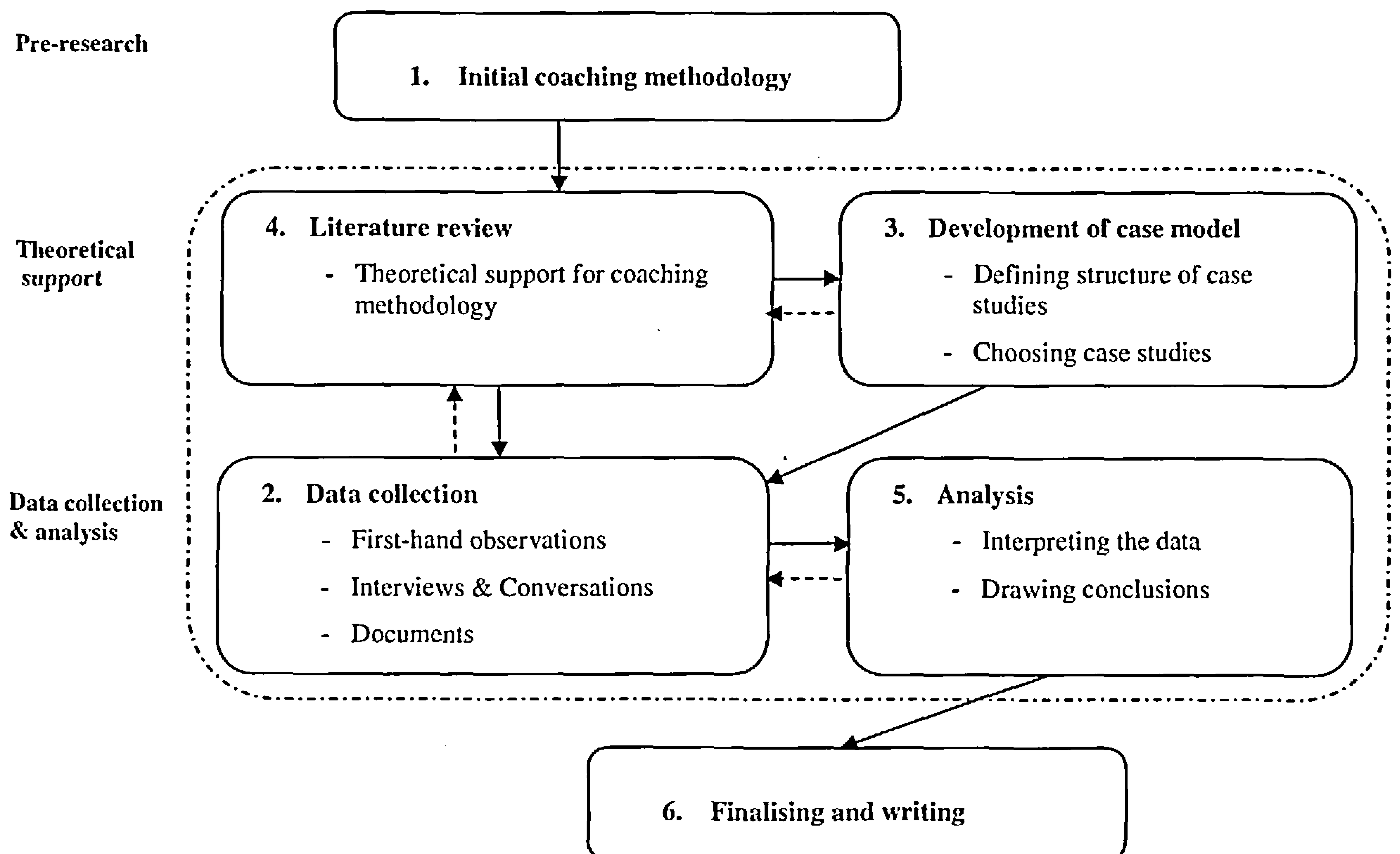
A third source of data was my formal and informal contact with observers of the subjects. Feedback from employees, board members and observers sometimes took the form of my questioning or interviewing them. More often, those who experienced the leaders' transformations first hand came to me with their comments. My interaction with many of these people was ongoing, in the manner described by Lofland and Lofland (1995)—an interweaving of observing and listening, of watching and asking for feedback, and listening and asking. The authors assert that this sort of regular contact can parallel intensive interviewing, and that it may indeed be more effective for data collection.

The data gleaned from this third source provided a means of evidence checking, or triangulation. As Denzin (1989) notes, triangulation is crucial in qualitative research, and thus multiple methods of observation must be employed. Both in terms of research and of action, feedback from third parties was an invaluable source of information and guidance, often providing suggestions, and assurance that our efforts were "on track". As explained above, action research has been criticized in some circles for its lack of rigor. Therefore,

the effort to garner information from multiple sources, and from people who knew little or nothing about the research and change projects, was critical. Given the intensive involvement of the researcher as change agent in this research model, I viewed this form of triangulation as the most effective way to insure the validity and reliability of the data, and of the eventual findings.

2.6 RESEARCH METHODOLOGY OVERVIEW

The research methodology is illustrated in Figure 1. In the diagram, the straight lines show the normal flow of activity; the dotted lines indicate "cycling back" to previous steps. In other words, steps 2 through 5 do not represent purely linear activity but rather a series of cycles.



1. **Initial coaching methodology** - Prior to beginning research activity, an initial coaching model was developed using heuristics from prior research, executive coaching and teaching leadership to MBAs.

2. **Literature review** – The review of literature provided theoretical support to the initial coaching model. This stage also helped to clarify and codify the initial coaching system. In addition, an exploration of the literature on action research methodology was conducted.

3. **Development of the case model** – A case study structure was designed based on the 18 components identified in steps 1 and 2. This model was then analysed in terms of relevance, consistency and practicality of data collection

4. **Data collection** – data for the case studies were collected from multiple sources during an extended period of time. The time periods for the three cases are summarized below:

Nilesh Nanavati	**Nick Heys**	**Timothy W. Bilodeau**
October 2002 to July 2004	May 2000 to June 2003	January 2002 to Dec. 2005
CEO of Advanced Financial Applications (AFA)	CEO of Emailvision	CEO of Medicines for Humanity (MFH)

Sources used were: first-hand observation, interviews, conversations, and documents.

5. **Data Analysis** – Analysis took place in two ways: Firstly, it was necessary to analyse the data as it was collected, "on the fly" so to speak, in order that decisions could be made about the next steps in the action research cycle. Secondly a deeper, a more reflective analysis was conducted after the action research cycles were completed, with a final view to determining whether research objectives were met and what management knowledge was gained.

6. **Finalizing and writing**

Un homme est toujours un conteur d'histoires, il vit entouré de ses histoires et des histoires d'autrui, il voit tout ce qui lui arrive à travers elles; et il cherche à vivre sa vie comme s'il la racontait. [1]

(Sartre, 1938, p. 62)

3. THE POWER OF STORIES

In this chapter, I survey and explain the compelling power of stories and storytelling. On a theoretical plane, I seek to demonstrate the sources of this power. In the discussion of the coaching process in chapter 4, I will focus on how we use the power of story in inspirational leadership.

In the four sections of the chapter, I detail the reasons why stories are so powerful, exploring the vast literature about storytelling. The sources of story's influence, and the basis of its ability to inspire, stem from four important characteristics. Stories are (1) universal and ubiquitous; they (2) determine our identity; (3) they mirror the human thought process; and (4) they are our most effective means of communication.

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[1] Man is at all times a teller of stories, he lives surrounded by his stories and the stories of others; he sees everything that happens to him through them, and he tries to live his life as if he were recounting it. SARTRE, J.-P. (1965) *Nausea,* London, Penguin.

3.1 STORIES ARE UBIQUITOUS AND UNIVERSAL

In this section, I discuss the literature and theory that portrays the ever-present nature of story as an organising vehicle for the human experience. Storytelling is simply an attribute that one finds in any civilization, without exception.

3.1.1 Story is central to all human culture

Human fascination with stories and storytelling transcends the barriers of culture and age; stories are as old as civilization itself. As Danish author Karen Blixen proclaims: "In the beginning was the story." (Blixen, 1986 p. 23)

As I (sometimes with co-author Loïck Roche) have written on various occasions (Roche and Sadowsky, 2002, Sadowsky and Roche, 2003, 2004), the phenomenon of storytelling is a common and unifying element for all the cultures of humanity. Stories are a common bond for all human beings for a simple reason: our lives are stories. (Berger, 1997 p. 1) For Brooks, our personal stories—the ones we tell ourselves constantly—are the way we understand and order our world. (Brooks, 1984 p. 3) Peter Orton, who wrote a thesis on the effects of story structure on audiences, arrived at a simple, underlying truth: "Humans are storytellers." (Weil, 1998 p. 38)

Stories are the way we communicate, teach, and connect with others. (Wilson, 1979 p. 4) Finlay and Hogan (1995) assert that traditional stories are the way all civilizations teach the norms of behaviour. Stories represent an important means by which children throughout the world come to understand life, since any culture's time-honoured tales are replete with recognizable patterns, events, and characters. (Pearson, 1989) Similarly, Neuhauser stresses the concept that stories have been used by "every culture ever studied for thousands of years" as the primary method of teaching values and codes of conduct. Tribal elders have never persuaded or educated others through logic and fact. Rather, they have always been master storytellers. (Neuhauser, 1993a pp. 13-4) Speaking at a Stanford Executive Briefing breakfast in 1993, Neuhauser termed storytelling "the single most

powerful form of human communication that has ever existed." (Neuhauser, 1993b)

Man is "essentially a storytelling animal", writes one renowned moral philosopher. (MacIntyre, 1984 p. 216) In a similar vein, Fisher refers to the entire race of *homo sapiens* as "*homo narrans*", teller of stories. (Fisher, 1984 p. 1) Man communicates, understands and learns primarily through narrative. (Fisher, 1987) For Pirsig, stories are necessary to move civilization forward. Without stories, we would never have evolved out of the era of the cave man. (Pirsig, 1974 p.302)

Card asserts that all cultures are characterized by their tendency to create mythic stories. (Card, 1990 p. 274) For Kopp, the human condition is defined by the capacity to tell a story. Humans are separated from nonhumans simply by dint of the human being's propensity to narrate his existence: (Kopp, 1972 p. 20) If Denning maintains that "we live in a soup of narratives" (Denning, 2001a p. 112), McAdams also sees narrative everywhere humans exist. In his analysis, the entire world is nothing more than a complex web of stories: "The stories we create influence the stories of other people, those stories give rise to still others, and soon we find meaning and connection within a web of story making and story living." (McAdams, 1993 p. 37)

Individuals relate so completely and implicitly with stories because human lives and stories have similar structures; in fact, every human life is a story. (Fleming, 2001 p. 35) If story is at the centre of every human life, we come to understand why storytelling has been part of every society, from the beginning of time to the present. As Parkin explains, "the history of every society in every part of the world includes its own version of storytelling." (Parkin, 2001 p. 7) Turner, as well, sees stories and storytelling as the central activity of mankind throughout the ages: "There is a general story to human existence: It is the story of how we use story..." (Turner 1996 p. 15)

The more one studies human civilization, the more one becomes convinced that stories have been around since the beginning, and that they were man's earliest form of communication. (Brooks, 1984 p. 3) Simmons echoes: "the oldest tool of influence in human history—[is] telling a good story." (Simmons, 2001 p. xvii) Palus and Horth (Palus and Horth, 2002 p. 58) comment that storytelling has been a part of human existence since prehistoric times. Indeed, if one sees the universe in biblical rather than evolutionary terms, the concept of narrative may have even predated mankind. Nobel laureate Elie Wiesel

maintains: "God made man because he loves stories." (Wiesel, 1966) For Janet, "narrative created humanity"—not the reverse! (1928 p. 261 quoted in De Certeau p. 115)

There are numerous spokespeople for the concept that stories are a central, even the central, organising device of the human mind, a primary form of thought common to everyone, and the way human beings make sense of the world. (Gardner and Laskin, 1995 p. 43, Turner, 1996, Simmons, 2001 p. 38)

To Schank, intelligent thought and storytelling are inextricably linked. In his field of artificial intelligence, true progress will only be possible when machines can tell and understand stories, since this is the way humans think. (Schank, 1990 p. 241) Denning (2001a), seems to agree with Schank's premise that stories are the essential building blocks of thought: "All the evidence in neurology and psychology points to the conclusion that human beings are hardwired to tell stories." (Sadowsky, 2002a) Nicholson uses exactly the same term as Denning, declaring that the propensity to think in story form, and the impulse to create and tell stories, is "hardwired" into all human creatures. (Nicholson, 2000 p. 211)

Narrative has been present in all civilizations and across all cultures, from the beginning of time to the current day. (Barthes, 1966 p. 79) Story is a fundamental characteristic of civilization, a powerful form of thought and communication that all human beings share. For Armstrong, "storytelling is ageless...Telling stories has been, and will continue to be, around forever." (Armstrong, 1992 p. 4) Xerox PARC co-founder Alan Kay proclaims: "Scratch the surface in a typical boardroom and we're all just cavemen with briefcases, hungry for a wise person to tell us stories." (Pink, 2006 p. 109)

Stories and their telling create a bond shared by all cultures. (Neuhauser 1993a p. 4) Vogler (2000) cites "the myths and fairy tales that link us all" and humanity's "eternal cast of characters and structures." To Anne Valley-Fox, even the most personal stories are somehow universal as well. (Keen and Fox, 1989 p. xxi) For Le Guin (1989 p. 30), the storytelling impulse transcends differences of race, culture and religion: "In the tale, in the telling, we are all one blood."

Numerous authors claim that the fundamental stories of mankind have changed little since the curtain rose on human existence. If Franz Boas writes of "the appalling monotony of

the fundamental ideas of mankind all over the globe" (Boas, 1911 p. 155), it is because we continue to live out the same stories as our contemporaries and our ancestors. Almost a century after Boas, and in more contemporary terms, Simmons affirms the same sentiment in her book *The Story Factor*: "In a way, if you've seen one epic, you've seen 'em all. We humans cycle through the same stories generation after generation." (Simmons, 2001 p. 135) Cather provides a more literary expression of this thesis—that the stories of our human race are few and forever repeating: "There are only two or three human stories, and they go on repeating themselves as fiercely as if they had never happened before." (Cather, 1913 Part II, p. 2)

3.1.2 The historical search for universal models and patterns

Since the telling of stories appears to be so widespread in all human cultures, recurring story patterns of myths and legends have sparked interest among scholars of the modern tale, such as Hollywood screenwriters. (Vogler 2000) For Campbell (1973 p. 3), the tales of civilization—whether ancient myth, medieval fairy tale or modern novel—are all the same basic story, differing only in the details, shadings, or accents. Fulford (2000 p. 123) agrees with Campbell that the basic human stories have followed a small number of general patterns throughout the ages. Only the media and the techniques have changed, not the stories or their central themes.

Campbell was so convinced of the predominance of the one basic human story that he borrowed the term "monomyth" from James Joyce's classic novel *Finnegan's Wake* (1939), and he espoused the concept that myths from all times and cultures fit the general underlying pattern of this one monomyth, or "hero's journey". (Campbell 1973) Campbell, and the others who searched for universal patterns, used "myth" in its original Greek sense of "*mythos*" or story, and can be extended to include all varieties of narrative. (Campbell, 2005, Davis, 2005) Thus, we take the term monomyth to mean "one story", as in its classic Greek meaning[2]. As we will see throughout this chapter 3.1, this quest to

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[2] The term "myth" has taken on various meanings in today's world. For some, "myths are commonly understood to be fictitious. On a popular level we typically think of myth as a sort of illusion in need of 'debunking'." MAHLER, J. (1988) The quest for organizational meaning: identifying and interpreting the

uncover common story patterns and structures took numerous routes, through myth, fairy tale, modern film, etc. Polkinghorne makes the point that all these forms are generalizable, and that we should treat these various categories of tale as prototypes for all narrative. (Polkinghorne, 1988 p. 85)

3.1.3 Structuralism and narratology

Since the early 20th century, students of classic stories—the myths, legends and folktales of various cultures—have been struck by the universal elements of these stories. Folklorists, anthropologists and linguists began to examine the hypothesis that the themes, plot structures, or characters in all human stories are predictable, even predetermined. Russian folklorist Vladimir Propp theorized that the fundamental forms in Russian folktales could be found in the stories of all cultures. Propp maintained that shared psychological concerns have led human beings of all cultures and in all times to produce stories whose underlying forms and elements should be seen as universal. (Propp, 1968)

In France, Levi-Strauss's anthropological examination of narrative was heavily influenced by his country's linguists. Structural linguists like Saussure had posited that language can be studied as a set of patterns and structures that are universal. In the various languages of the world, the grammar rules may be quite different, but the structure is still the same: words are joined together in a grammatical system to make meaning. To Saussure, there was a fundamental linguistic element even more basic than the word, which he termed the "phoneme", or unit of sound. (Klages, 2001)

Levi-Strauss hypothesized that narrative also consists of basic elementary structures, (in French "*mythèmes*") which will always be combined in defined patterns, much as the basic units of language are combined according to well-defined systems. Even apparently

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symbolism in organizational stories. *Administration and Society,* 20, 344-68. To others, they are not fictitious at all, but rather central elements of self-knowledge for a society. They are "about what makes us tick...as old as humanity and as current as the news." DAVIS, K. C. (2005) *Don't know much about mythology : everything you need to know about the greatest stories in human history but never learned,* New York, HarperCollins Publishers. For purposes of this paper, it is best to think of myth simply in a generic sense, as a classic form of narrative.

different myths were therefore expressions of a small number of basic forms, which remained the same in all times and across all cultures. (Lévi-Strauss, 1963b pp. 203-4) The "elementary functions" of Levi-Strauss were seen as *inherent in the mind itself.* (Polkinghorne, 1988 p. 83) In his view, universal story forms and patterns were the necessary structuring mechanisms, pre-wired in the brain, to make sense of myth. (Lévi-Strauss, 1963a)

Bulgarian Tzvetan Todorov is widely credited with coining the term "narratology", and with advancing the linguistic study of narrative. (Prince, 1997) In 1969, Todorov asserted that one could use grammatical logic to analyse the organisation of a story. (Rudrum, 2002) He espoused the concept that there is a universal grammar that reflects the structure of all reality, since it corresponds to "the structure of the universe itself." (Hawkes, 1977 p. 96) For Todorov, all stories are built from the common building blocks of this universal grammar. (Todorov, 1969)

Greimas extended the universal grammar concept further, defining his "actantial" model, with six "actants": Subject and Object, Receiver and Sender, Helper and Opponent. In so doing, he sought to demonstrate that all narratives could be analysed in terms of the relations, at the level of deep grammatical structure, between these six actants. (Rudrum, 2002) Like Propp and Levi-Strauss, he saw models, patterns and structures that had their roots in the "truth" of universal forms.

While Bruner (2002) sees Propp as the father of narratology, and Polkinghorne (1988) sees Todorov's work as ground-breaking, subsequent students of narrative tended to find the formalistic approaches of these early narratologists overly structured and limiting. For example, Bremond (1964, 1966) saw multiple alternative possibilities at key points in the tale, intertwined elements which he described as similar to the fibres of muscle or to a sort of tree diagram. In their in-depth analysis of Propp's work, Bremond and Verrier showed that Propp had chosen to ignore some common tales, or aspects of these tales, that did not fit his "grid". (Bremond and Verrier, 1982, 1984) Similarly, Neeman concludes that Propp's structural analysis takes considerable liberties with the stories, and that his efforts to study folk tales in purely morphological terms are overly rigid and simplistic. (Neeman, 2001)

Barthes (1966, 1972) and Culler (1975) are sceptical about the strict structuralist view of

Propp, and of narrative universals, including the universal grammar of Todorov. While both recognize that general patterns and themes exist, and that stories can be broken down into recognizable units, they refuse to embrace the concept of a single deep plot structure. Lyotard, as well, would criticise the structuralist concept and its persistent reduction of diverse narratives from different genres and cultures to the same rudimentary structures. (Lyotard, 1984, Rudrum, 2002) The movement to postmodernism, and the advent of deconstruction, ushered in an era of criticism of narratologists, and a loss of confidence in their structuralist approach to story analysis. However, interest in narrative models and structures did not wane; it merely resurfaced in other, perhaps more flexible, forms. (Rudrum, 2002)

3.1.4 Archetypal stories and the collective unconscious

Jung explored the concept of universality from the perspective of the mind. He felt that if classic stories and characters are similar across all cultures, it is because the human brain is pre-programmed to create them, according to pre-established models. Jung espoused the notion that there exists an unconscious link between all human beings—a shared innate *mythos*, a common origin for all our stories. The basic characters and building blocks for human tales and legends, the archetypes, belong to a 'collective unconscious' that is shared and inherited by all human beings. (1968) For Jung, the content of the collective unconscious is made up essentially of *archetypes*." (Jung and Campbell, 1971 pp. 59-60)

Whereas Freud assumed that one's dreams and fantasies resulted from individual experiences and conditioning only, Jung noted in his practice that dreams and fantasies followed well-known narrative patterns, and thus were somewhat predictable. Dreams, fantasies, myths, and classic human stories all arise from the "material" of the collective unconscious. Thus, all human beings share a common psychic heritage that transcends apparent differences of time, space, and culture. (Mark and Pearson 2001 p. 31) In *Psychology and Religion,* Jung explains this phenomenon—the link between dream, myth, archetypes, and the collective unconscious—in great detail. (Jung, 1938 pp. 63-4)

For Jung, the collective unconscious is at the origin of all human stories—the dreams that dominate our sleeping state, and the narratives that define our waking existence. Since the

archetypes are inherited rather than acquired, the brain is pre-wired to accept and adopt the characters and patterns of the classic human tales. In addition, he claims that the concept of a common—shared and inborn—origin for the basic human stories and archetypes predates his argument. Nietzsche, for example, shared the belief that all human beings inherit dreams and stories from an innate, collective source: "In our sleep and in our dreams we pass through the whole thought of earlier humanity. I mean, in the same way that man reasons in his dreams, he reasoned when in the waking state many thousands of years...The dream carries us back into earlier states of human culture." (Nietzsche and Handwerk, 1997 p. 13)

Archetypal stories, then, spring from the deep reaches of the unconscious, the part that is common to all humanity, universal, and *identical to all individuals.* (Jung and Campbell, 1971 p. 60) Despite the divergent terminology of those in various areas of study, Jung contends that intellectuals from other times and in other fields have endorsed his underlying concept: classic human drama will always follow familiar archetypal patterns regardless of time or culture, since all the typical events and characters are drawn from the common pool of the collective unconscious. (Jung, 1938 p. 64) Jungian concepts have found their way into the research and theories of numerous scholars of story universality, extending even to the narratologists and structuralists such as Propp, Todorov and Levi-Strauss. (Prince, 1997)

Scholars and practitioners in various wide-ranging fields—from psychiatry to organisational studies, comparative religion to knowledge management, cognitive psychology to marketing and brand building—have embraced the general concept of story universals, particularly as it concerns the structure of epic human tales and the archetypal characters. For example, students of comparative religion, most notably Paul Saintyves (Saintyves, 1922, 1923, 1934) and Eliade (Eliade, 1958, 1963, 1965) conclude that the underlying structures of primitive legends, fairy tales, and religious stories, particularly those involving rites and initiation, are found across a wide variety of cultures, and thus must be deeply ingrained in the human psyche.

In the 1970s, Bettelheim became fascinated with universal similarities, not only among myths and tales, but also the similarities between the classic stories and the stories of everyday life. (Bettelheim, 1976 p. 35) As he explains, children use, indeed need, the classic story patterns to make sense of their daily experience in the real world. A child,

or for that matter an adult, recognizes situations and characters of the classic fairy tale because they are archetypal or, to use his words, "clearly drawn...typical rather than unique." (op. cit. p. 8)

If, for Bettelheim, ancient fairy tales speak to the unconscious mind in a language of pre-programmed symbols, many analysts of modern story media have come to similar conclusions. Frenchman Christian Metz, for example, applied many narratological insights to the field of film theory, in his classic studies of the semiotics of cinema, searching for the universal narrative codes of this modern storytelling medium. (Metz, 1968, 1974, Rudrum, 2002) Others make the point that contemporary texts from such diverse realms as detective stories, comic books, television advertisements, and postmodern science fiction films all revert to classic archetypal patters. (Davis, 2005, Vogler, 1998, Miller, 2000, Berger, 1997)

Since the latter part of the 20th century, epic stories, archetypes and universality have caught the attention of numerous organisational theorists. Many have shown that the modern organisation is rich in mythic structures, indeed that today's corporate drama is replete with heroes and villains, mentors and tricksters, triumphant rises and tragic falls, missions, noble struggles and sacrifices. (Mitroff and Kilmann, 1976, Martin and Powers, 1983a, Kanter, 1983, Gabriel, 1991b, 1998, 2000, Bowles, 1989, Ingersoll and Adams, 1986, Mahler, 1988, Dandridge et al., 1980, Wilkins, 1983, Wilkins and Martin, 1979, Zaleznik, 1989) All these authors argue that the study of these myths and legends of an organisation yields deep insight into corporate culture and values. Snowden relies on business's classic stories and archetypes whenever he does organisational analysis. As he states on several occasions, portrayals gathered in this way are far more meaningful than information gleaned from other types of studies. (Snowden, 2000 p. 219, 2001 p. 15, Sadowsky, 2001b)

3.1.5 Story universals and the modern organisation

Researchers in organisational behaviour are reaching the conclusion that our modern stories—in corporations as elsewhere—follow unrelentingly the classic patterns. Richard Stone, director of the StoryWork Institute in Florida, sees the classic human sagas in all the

organisations he works with. (Stone 2003) As an illustration of Stone's argument, Dennehy analyses the corporate lore of McDonald's, General Electric and Hewlett-Packard, concluding that these corporate stories follow the traditional framework of "myths, hero stories, classic fairy tales, [and] ethnic stories". (Dennehy, 1999 p. 42) Similarly, Mark Helprin, novelist and contributing editor of the *Wall Street Journal*, finds great similarity between the business story and the great classics of literature and folklore. (Welles, 1996) According to Broms and Gahmberg, all the themes of the universal grand myths, such as the eternal quest, the golden age, the eternal youth, rebirth, the end of the world or the scapegoat, may be found in organisational stories of today. (Broms et al., 1987)

In fact, if one pays close attention to recent business literature, it is not difficult to see that the concepts of classic story patterns, myth, legend, and archetypes have found their way into multiple facets of modern organisational discourse—from venture capital to strategy consulting, and just about everywhere in between. For example, seed-capital investor Dick Morley, who has 30 years of experience evaluating start-up businesses, says that he looks for entrepreneurs who can relate "heroic" stories that contain "mythical messages". (Welles, 1996) In the world of advertising, as well, Alex Kroll, former CEO of the giant agency Young & Rubicam, advises ad executives and their clients to utilize the universal archetypal story patterns. As he expresses it, effective advertising "is about finding the right story". And, what is the "right" story? According to Kroll, the most effective brands create stories that tap into "the most ancient grooves in our mental architecture, which Carl Jung described as 'archetypes'" (Mark and Pearson 2001 p. viii) As a world-renowned consultant who advises some of the world's most complex organisations in their management of knowledge, Dave Snowden writes extensively about stories and knowledge management (Snowden, 1999, 2000, 2001), and he says that he often uses the concept of archetypes in working with his clients. (Sadowsky, 2001b)

Polkinghorne argues that narrative universals are fundamental to human thinking, and worth tapping into in the construction of modern corporate tales. (Polkinghorne, 1988 p. 93) Thus, Marie Finlay, a consultant in organisational change, uses mythic story structures to help individuals and groups see themselves as empowered and capable of greater accomplishment. (Finlay and Hogan, 1995) Marketing consultants Mark and Pearson treat branding as an exercise in fitting a company image to a classic mythical tale. (Mark and

Pearson, 2001 p. 11) Anthropologist Clotaire Rapaille uses the power of archetypes in his consulting work for Fortune 500 companies. (Coutu, 2006)

In their study of innovation, Buckler and Zien "stumbled upon" numerous examples of corporate stories that were mythical and archetypal in nature, following classic patterns. (Buckler and Zien, 1996 p. 394) While researching Hewlett-Packard, Nymark discovered that much in HP lore, particularly stories about the company's founders, followed archetypal patterns. (Nymark, 2000) Indeed, HP veteran Marv Patterson claimed in 1996 that the corporate mythology at the company had always been very strong, and that employees who traveled to their many different sites would often get to know each other by telling "Bill 'n' Dave" stories that symbolize these values, demonstrating the famous "HP Way". (Buckler and Zien, 1996 p. 394) Mark and Pearson cite HP as an example of the archetypical Lover organisation, an enterprise that emphasizes how the workplace "feels", seeking an idyllic setting of respect for the individual, a culture of camaraderie, and beautiful surroundings. (Mark and Pearson, 2001 p. 192)

According to scholars of organisational behaviour, numerous other companies exhibit strong corporate mythologies—particularly legendary tales of the founders and the early days—that express the values of the organisation in archetypal terms. (Cohen and Prusak, 2001 p. 121, Neuhauser, 1993a p. 47, Schein, 1992 pp. 91-92) At Marriott, the classic stories of legendary behaviour that perpetuate Marriott's archetypal Caregiver image. (Ford et al., 2001 p. 54) Nike systematically immerses new employees in company lore during their orientation, emphasizing the company's Hero image. (Sacharin, 2001 p. 122)

At these companies, one can readily make the case that employees identify easily with their company's mythological stories because these company legends often follow universal patterns and archetypical structures. As corporate dramas play out on the great stage of business, the actors "recognize" the underlying themes, patterns and archetypes because the have been pre-programmed to do so. Cohen and Prusak explain this phenomenon, comparing the mythology of an organisation with a strong culture to that of any classic civilization. For them, the classic corporate stories mirror the classic human stories. (Cohen and Prusak, 2001p. 121)

3.1.6 Campbell's monomyth—The Hero's Journey

Campbell (1949, 1959) used the term "monomyth" to define his Hero's Journey, which he viewed as the universal underlying pattern of all great mythical tales, both classic and modern. In order to understand the general concept of the monomyth, and the power of the Hero archetype, we will briefly describe Campbell's point of view, and give a simplified explanation of the Hero's Journey. A more in-depth discussion of this classic journey—with all its stages and sub-stages—is perhaps beyond the scope of this paper; those interested may find far more detail in *The Hero with a Thousand Faces,* or elaborate applications of the monomyth in Vogler (1992, 1998, 2000) and Mark and Pearson (2001).

Originally a student of medieval English literature, Campbell was heavily influenced by the stories of King Arthur and the Knights of the Round Table. One of his early discoveries was that the Arthurian legends followed a few basic motifs, and that these motifs were shared with the legends of American Indian folklore. This finding led to Campbell's first major work, *The Hero with a Thousand Faces* (1949), in which he posits that these story patterns form the basis of a "monomyth": a heroic journey, whose underlying structure can be found in the mythology of any culture, independent of historical or geographical circumstances. The pattern of the Hero's Journey is elegant and simple. In short form, Campbell states that a hero "ventures forth from the world of the common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man." (Campbell, 1973 p. 30) Similarly to Jung, Campbell believed that the myths of all cultures are linked, since they represent cultural expressions of the universal need of the human psyche to explain and interpret the human condition.

In fact, the Hero's Journey follows the basic Arthurian legend cycle through four phases: separation, descent, initiation, and return. As Campbell and others (Propp, 1968, Raglan, 1956) have suggested, the Hero's Journey is a template that classic myths from all cultures appear to follow. Many of our modern tales also repeat the monomythic structure, as Vogler (1998), Berger (1997), Bruner (1991), and Mark and Pearson (2001) have demonstrated. *Star Wars* creator George Lucas, in fact, was greatly influenced by Campbell and the Arthurian myth cycle. (Mark and Pearson 2001) A quick look at many

novels and films of recent times reveals that the monomyth is alive and well today. For example, even a cursory examination of *The Lord of the Rings* trilogy (Tolkein's novels or Peter Jackson's films) reveals a story that follows the monomythic structure and portrays archetypal characters.

3.1.7 The Leader's Journey, heroic tales, and the modern organisation

What does all this talk of universal stories, archetypes, journeys and heroes have to do with leadership, or with today's organisation? In Campbell's view, mythical heroes can serve as a source of inspiration for leaders, since these heroes represent timeless archetypes of human possibility. Thus, we should all use the tales of heroes to inspire us in our daily lives. In the author's own words: "It has always been the prime function of mythology and rite to supply the symbols that carry the human spirit forward, in counteraction to those other constant human fantasies that tend to tie it back." (Campbell, 1973 p. 11)

At this point in our discussion, my goal is merely to demonstrate the universal character of archetypes and certain classic story patterns, including the hero's journey. In chapter 4, I present a more in-depth discussion of the hero's journey, and further explain how it applies to leadership discourse in today's organisations.

3.2 STORIES ARE POWERFUL BECAUSE THEY DEFINE WHO WE ARE

In this section, I discuss the concept that we define ourselves by our stories (3.2.1). Stories of identity and meaning also define our communities (3.2.2). Stories are the place where an individual or group's values are held. Telling them is the way we express who we are. It is through its stories that a company expresses its values and identity (3.2.3)

3.2.1 Stories and individual sense of self

German philosopher Friedrich Wilhelm Nietzsche held the profound conviction that stories are the central defining element of the human personality. For Nietzsche, "stories and legends protect imagination and thought from aimless wandering. In Nietzsche's world, a man without stories is a man who has lost his roots." (Safranski, 2000 p. 76)

Nietzsche is far from alone in voicing this notion—that any man who loses his stories loses his sense of self, his concept of what is important, and thus becomes uprooted. MacIntyre echoes the concept that stories are so essential to human identity that without them we lose our way. All humans create their sense of what matters, and how they should act, by referring consciously or unconsciously to the stories they have learned: "I can only answer the question, 'What am I to do?' if I can answer the prior question, 'Of what stories do I find myself a part?'" (MacIntyre, 1984 p. 216) *Peter Pan,* J.M. Barrie's sentimental fantasy, dramatizes the concept of Nietzsche and MacIntyre—that human beings, disconnected from stories, become lost. Peter Pan describes himself as a lost boy who has not been told stories; and that is why he can't grow up to inhabit stories of his own, as other boys do. (Barrie and Gustafson, 1991 p. 33)

According to Linde, if the mythical child Peter Pan were to grow to adulthood, he would create his sense of a coherent self through the medium of stories, since human beings are defined principally by the stories they tell themselves. (Linde, 1993) Similarly, Orson Scott Card is firmly convinced that identity and story are intimately intertwined. As he writes: "Our very identity is a collection of stories we have come to believe about ourselves." (Card, 1990 p. 274) Freelance writer Daniel Pink follows the same line, stating simply: "We are our stories...That has always been true." (Pink, 2006 p. 115)

As we saw in the introductory quote to this chapter, Sartre wrote that man "lives surrounded by his stories and the stories of others, he sees everything that happens to him through them, and he tries to live his life as if he were recounting it." (Sartre, 1965 p. 61) Addressing the same theme, MacIntyre describes "how natural it is to think of the self in narrative mode." (MacIntyre, 1984 p. 206) Psychologist Gail Sheehy makes a similar argument, that the human mind organises life's events by creating stories. We define and shape reality through the stories we are constantly telling ourselves in our minds, and

sharing with others. (Sheehy, 1995 p. 169) Simmons concurs, and she adds that most people are not aware of the extent to which narrative forms dominate their thinking. (Simmons, 2001 p. 38) In short, our human identity is determined by the stories we tell and come to believe about ourselves.

Sam Keen, who has spent a career focusing on individual's life stories and "personal mythologies", concludes that the most vibrant and energetic individuals revisit their storylines constantly, to reinvent themselves. (Keen and Fox, 1973) Thus, when Ibarra and Lineback work with people navigating through dramatic or disruptive career changes, they encourage them to create and tell a new story. As they explain, in simple terms: "We use stories to reinvent ourselves." (Ibarra and Lineback, 2005 p. 71)

Celebrated psychiatrist and author Robert Coles opines that stories are an important device to order one's life, and that nothing is more central to the human sense of existence than the narratives we construct and take with us. Throughout life, our stories become the self-fulfilling prophecies that transform us and determine our emerging identity, at any point in time. (Coles, 1989) And, when all else is stripped away, only our stories remain. In *The Call of the Story*, Coles recounts the evening when his close friend, the physician and poet William Carlos Williams, taught him this important truth about the entire human race: "Their story, yours, mine—it's what we all carry with us on this trip we take." (Coles, 1989 p. 7)

If stories are how we define and understand our selves, and if they are all we truly carry on our life's journey, then they are all we can ultimately give to others. When we want someone to know us, we give them our life stories, "we share stories of our childhoods, our families, our school years, our first loves, the development of our political views, and so on." (Ibarra and Lineback, 2005 p. 66) Numerous scholars (Bruner, 1991; 1996; Gergen, 1994; Gergen & Gergen, 1986) opine that personal narratives *are* our identities, or that life stories are a way of *fashioning* identity (Linde 1993; Ochberg, 1994). All seem to agree, though, that we discover ourselves, and reveal ourselves to others, through the personal stories we tell. (Lieblich et al., 1998, Shamir et al., 2002, Sadowsky, 2002b)

Our personal narratives define who we are by allowing us to create meaning in our lives. According to Weick, "what is necessary in sensemaking is a good story." (Weick 1995 pp. 60-61) To philosopher Eric Hoffer, man is not only a storyteller but also a meaning-

seeker. As he writes, "Man is eminently a storyteller. His search for a purpose, a cause, an ideal, a mission and the like is largely a search for a plot and a pattern in the development of his life story." (Hoffer, 1955 aphorism #97) For Choy, as well, human beings "hunger for personal narrative" because they need to find a purpose in life. (Choy, 1998 p. 94)

To some, it is more the act of *telling*—as opposed to the act of *crafting*—one's personal narrative that leads to finding meaning. Bateson says simply that "story<u>telling</u> is fundamental to the human search for meaning." (Bateson, 1989 p. 34 emphasis on "telling" mine) As Keen explains, "When we tell our stories to one another, we, at one and the same time, find the meaning of our lives." (Keen and Fox, 1989 p. xviii) For Choy, as well, it is our yearning for meaning that pushes us to become storytellers. When we tell our personal stories of identity, we "connect and reassemble the events in our lives to see if the result is something we call *meaning*." (Choy, 1998 p. 94)

According to some specialists, when we have no more stories to tell, meaning is gone from our lives. In the most extreme cases, hopelessness, insanity, or even suicide may result. Auster writes that personal narratives guide us through life, and that individuals who go insane, who "lose the plot" and unravel, are those who lose their storylines. (Auster, 2006) Similarly, Fulford tells us that "to discover we have no story is to acknowledge that our existence is meaningless." (Fulford, 2000) Keen, who has run hundreds of "Personal Mythology" workshops since 1969, has come to see stories as so central to identity that "when we forget our stories...we feel nameless and empty." (Keen and Fox, 1989 p. 2) Forensic Psychiatrist Dr. Keith Ablow, who has asked himself for many years what would lead someone to take his own life, explains the phenomenon of suicide in the following terms: "I think the thing that binds together most people who go on to take their lives is that they have an inability to imagine the next chapter in their life stories." (King, 2006)

3.2.2 Stories and group sense of self

If stories define who we are as individuals, they also define and unite our communities. For Denning, story is central to the very definition of community. As he asks: "What is a community, if not a group of people who share the same stories and regard those stories as meaningful?" (Sadowsky, 2002a) Kurtz and Ketchum espouse the same concept when

they write that "community requires the discovery of a story that is shared." (Kurtz and Ketchum, 1994 p. 240) Card concurs, writing that "it is in large part through shared stories that communities create themselves and bind themselves together." (Card, 1990 p. 273) As Quinn states, shibboleth stories come to exist because organisations tell them repeatedly and tirelessly: "The carrier of culture is the story we tell ourselves over and over again." (Quinn, 2006)

Neuhauser reminds us that storytelling has been defining and binding communities since ancient times: "Storytelling has been used for thousands of years as a way of connecting the past, present, and future of a community's life." (Neuhauser, 1993a p. ix) In olden times, this communal sharing of stories happened quite naturally; as tribes gathered for reasons of necessity and survival, their stories became the vehicle for defining and sustaining the norms and traditions of the group. As Kouzes and Posner assert, "storytelling is one of the oldest ways in the world to convey the values and ideals shared by a community. Before the written word, stories were the means of passing along the important lessons of life." (Kouzes and Posner, 1993 p. 24) For Finlay, stories have always been, and still are, the way communities teach their important lessons of shared belonging and shared behaviour. (Finlay and Hogan, 1995)

In modern times, as well, the tribal narrative remains the way that a group defines its identity, its shared values, its sense of self, and its concept of who belongs and who does not. Corporations are discovering the power of stories to provide work groups with a sense of shared identity. As Holden states, "many companies are finding that stories can be the glue that holds an organisation together." (Holden and Steinauer, 1999 p. 65) For Linde, stories serve the same function as they did in ancient times, for any culture, group, or organisation. She asserts that "stories help any organisation bring in new members, adapt to change, define who is 'us' and who is 'them', and why we are here." (Stewart, 1998 p. 165) IBM's Snowden maintains that: "story telling is a uniting and defining component of all communities". He goes on to assert that he has come to judge the health of a community, at least in part, by the character of its stories. (Snowden, 1999 p. 30)

As we have observed previously, individuals who lose their stories lose their way in the world. Mitroff and Kilmann describe the same phenomenon in organisations, proclaiming that companies are dependent on their stories to move forward. As they point out: "Stories are so central to organisations that not only do organisations depend on them, but

stronger still, they *couldn't function without them.* Big or small, every organisation is dependent upon countless stories for its functioning." (Mitroff and Kilmann, 1975 p. 18 emphasis mine)

The language of Mitroff and Kilmann bears a striking resemblance to that of Byatt, for whom "narration is as much part of human nature as breath and the circulation of the blood." (Byatt, 2000 p. 166) In fact, the more one studies the question, the more one observes remarkable parallels between individual and group use of stories. Both individuals and groups define themselves and their uniqueness by the stories they find meaningful. Just as humans need stories to retain their sense of self, so do organisations. According to Bob Rogers, founder and chairman of BRC Imagination Arts, the 21st century "will be a search for meaning. We're going to find meaning in stories that tell us who we are...Story is what touches people." (Kirsner, 2002)

Nietzsche's argument that stories are the central determinant of an individual's identity extends to group identity as well. In fact, for Nietzsche, stories form the foundation of all social and cultural cohesion, and therefore are central to the notion of community. Deprived of its stories, a civilization will lose its purpose and direction, much as Barrie's mythical Peter Pan loses his way. (Safranski, 2000) In *The Dawn* (1881), Nietzsche expresses his view that certain types of stories represent a code of behaviour that moulds a group—stating that stories and legends constitute a strong organising principle for any organisation. Story is the critical element for expressing a group's unique identity. (Kaufman, 1959 p. 76)

DePree describes an incident that illustrates perfectly Nietzsche's point: a community that forgets its stories loses its identity. The anecdote takes place in a Nigerian village in the late 1960s.

> Electricity had just been brought into the village...Each family got a single light bulb in its hut...The trouble was that at night, though they had nothing to read and many of them did not know how to read, the families would sit in their huts in awe of this wonderful symbol of technology.
>
> The light bulb watching began to replace the customary nighttime gatherings by the tribal fire, where the tribal storytellers, the elders would pass along the history of the tribes. The tribe was losing its history in the light of a few electric bulbs. (DePree, 1990 p. 81)

In this story, we see that without the continuity of the "tribal" narrative, members of any community will "forget who they are." (DePree, 1990 p. 82) Neuhauser uses similar terminology, stressing the importance of "tribal campfires" in defining a group and its culture. Tribal elders, she says, never convinced others by handing out statistical reports of lists of facts. Instead, the most successful among them became master storytellers. "Without storytelling, any culture...would have a very difficult time protecting and passing on the best of its culture." (Neuhauser, 1993a pp. 13-14)

Neuhauser's reference to storytelling around "tribal campfires" calls to mind Durkheim's (1961) classic study of myth, in which he advances the theory that "tribal narratives" are the concrete manifestations of a group's values. Indeed, anthropologists have long recognized that stories create the sense of cultural identity, a tribal element that defines and binds communities. Among them, Cohen (1969), Clark (1970) and Malinowski (1984) have made the link between anthropological myths and commitment to a group. One modern-day mythologist and storyteller who believes deeply in the power of the tribal campfire is Sam Keen. His two books about storytelling (Keen and Fox, 1973, 1989) begin with images are decidedly tribal.

For Keen and Neuhauser, the purpose of an organisation's mythology has not changed since ancient times. We still need mythological stories, "to answer the same questions that myths have answered in cultures everywhere: Where did we come from? What is the purpose of my life? With whom do I belong?" (Neuhauser, 1993a p. 48) Taken together, these questions focus us on some of the most profound themes of human existence. In this light, we understand the perspective of Kenneth Davis, author of *Don't Know Much about Mythology*, who defines myth very broadly like the ancient Greeks. He explains: "Viewed in this very ancient and much broader sense, myths are about what makes us tick. They are as old as humanity and as current as the news." (Davis, 2005 p. 25)

3.2.3 Stories, mythology, and today's organisation

For Keen and Neuhauser, all organisations have mythologies. Even at the level of the family, a group will exhibit its own unique systems of story, myth and ritual. In Keen's view, "Every family, like a miniculture...has an elaborate system of stories and rituals."

(Keen and Fox, 1989) Corporations are no different, as they too will have a multitude of stories and myths that will reveal their unique character. Neuhauser sees corporate lore—the stories and myths of any company—as the best way for anyone, outsider or insider, to understand the organisation. (Neuhauser, 1993a p. 153) As we will see, numerous scholars argue that stories have the same function in the world of business as they had in ancient times: delineating communities according to their values, behaviours, and sense of shared identity.

Stories and corporate values

Myth and story are powerful because they characterize our organisations by providing concrete examples of the group's values. In describing the role of modern corporate storytellers, Neuhauser compares it to that of the shaman in some traditional societies: keeper of the values. (Neuhauser, 1993a p. 44) Similarly, Denning proclaims that stories are the place where an organisation's values are kept. (Sadowsky, 2001a) Simmons would agree, since to her way of thinking, telling a story is far more effective than writing a policy statement about a company value. She affirms: "Story lets you instil values in a way that keeps people thinking for themselves. 'We value integrity' means nothing. But tell a story about a salesperson who owned up to a mistake and earned so much trust her customer doubled his order, and you begin to teach an employee what integrity means." (Simmons, 2001 p. 20)

In fact, scholarly interest in the link between storytelling and values goes back several decades In a 1988 article, Mahler reports that myth and story "are increasingly recognized as important expressions of organisational values" (Mahler, 1988 p. 346). Others who refer to story as a key element in portraying and promoting organisational values include Pondy (1983b), Dandridge et al. (1980), Peters and Waterman (1982), Frost (1991), and Frost et al. (1985). The work of Wilkins (1978, Wilkins and Martin, 1979, 1983, 1984) from the late 1970s and early 1980s is replete with allusions to stories and storytelling as powerful vehicles for advancing organisational values. In his view, values are best transmitted through the concrete examples of a story. (Wilkins, 1984 p. 59) Others (Barnett, 1988, Martin, 1982) concur that organisations transmit values most effectively through the stories people tell; Hansen and Kahnweiler (Hansen and Kahnweiler, 1993 p. 1393) state explicitly that "stories provide a shortcut for new members to learn about an

organisation's culture."

Today, some organisations consciously engage in storytelling and myth building to spread corporate values among employees. At Armstrong Furniture, corporate values are explained in story form, since "management fads come and go, but storytelling has been around forever." (Armstrong, 1992 p. 12) Similarly, Nordstrom uses a corporate orientation ritual to remind employees of its core value of customer service, and to build a bond—a sense of shared undertaking—between old and new employees. (Lencioni, 2002 p. 117) Pottruck and Pearce write that they deliberately used tribal storytelling and ritual in moulding the culture of the brokerage house Charles Schwab, as they were convinced that "beyond the abstractions of language, there must be consistent action and then active myth building: the values must be reinforced with story, image and ritual." (Pottruck and Pearce, 2000a p. 29)

Stories guide behaviour

Stories are powerful forces for demonstrating what behaviour is normal, what is inappropriate, or what is considered truly excellent in an organisation. As Metzger explains, the stories that are told in a company will build the corporate culture and teach employees about appropriate behaviour. (Metzger, 2000) Simmons concurs, stating that in any organisation "the stories that are told and retold will define behaviour better than any policy manual." (Simmons, 2001 p. 222)

Wilkins (1983) demonstrates that stories of the organisation's past often become vehicles for passing on cultural norms, and guides for behaviour. Similarly, Schein affirms that the stories that guide behaviour are often mythic stories of the founders or leaders. (Schein, 1992 p. 183) One such story that circulates at Marriott International is that CEO Bill Marriott often goes to a hotel kitchen at 6 am to make sure the pancakes are prepared correctly. (Ford et al., 2001) This story has far greater impact than any discussion of attention to detail in customer service.

Pottruck and Pearce advocate "active myth building" using a group's emblematic hero stories to explain expected behaviour. (Pottruck and Pearce, 2000a p. 29) In his research in numerous companies, Wilkins has found that employees are often incapable of explaining the "how we do things around here" in precise terms, but they are quite willing and able

to tell stories that demonstrate it. (Wilkins, 1983) As he describes his experience in one of these organisations: "When I interviewed managers and employees at a successful major electronics firm they could not define in mere words what the 'company way' was but they could define it using stories which were well known in the company." (Wilkins, 1984 p. 45) These shared stories, that are well known in the company, serve the role of explaining to new employees and outsiders "who we are" and how we operate. They also serve as constant reminders that guide the behaviour of company veterans.

Stories, identity and corporate bonding

Stories that transmit values and guide behaviour also foster a sense of belonging to a community. With each retelling, members are rediscovering the collective meaning contained in the stories. As Stewart explains, the ties that bind, sustain and preserve any group are contained in its shared stories. In other words, "to preserve an organisation means preserving its stories." (Stewart, 1998 p. 79)

In today's organisation, tribal storytelling goes on—around figurative campfires. Whether at coffee machine, around the photocopier, or in the staff restaurant, "the sharing of a story builds the community and bonds people together." (Parkin, 2001 p. 9) Such is the experience of Michel Cauzid, former network administrator at Hewlett-Packard in Grenoble, France. When Cauzid talks of the story-rich environment at HP in the 1990s, one understands the importance of storytelling and bonding around the coffee machines. As he describes: "I came to realize that the informal channel of the coffee machine—the place where people told their stories—was far more effective or powerful than any official means of communication." (Sadowsky, 1999)

Stone describes some of his favourite companies and their storytelling rituals in anthropological terms, comparing workers to the hunters of old gathering at day's end "around the central fire". (Stone, 2003) At PSS (Physician Sales and Service), CEO Pat Kelly not only spends much of his time walking around listening and telling stories with employees, he refers to this activity as "stoking the campfire." (Weil, 1998) Even though the company had grown to 4,000 employees and $1.3 billion in revenue (in 1998), Kelly sought to preserve the community atmosphere. When asked about teaching values in a large organisation, he replied simply: "The way we pass along our values is to sit around

the campfire and share stories." (Weil, 1998) David Armstrong, as well, writes some of his most productive and important time is spent on the floor with individuals and small groups, telling his stories and hearing those of others. (Armstrong, 1992)

3.3 STORIES ARE POWERFUL BECAUSE THEY MIRROR HUMAN THOUGHT

The power of stories stems largely from the simple fact that human lives are organised as stories. Despite all our efforts to think rationally, logically, or scientifically, the human mind works along a narrative paradigm. In this section, we go on to say that since stories mirror human thought, they are also the way we learn and remember (3.3.2). They are also the way our *organisations* learn, teach, and remember. For example, stories are the way our corporations preserve and share knowledge. (3.3.3)

3.3.1 Stories organise and govern the human thought process

In this section, I explore briefly the history of two modes of thought, narrative and scientific (paradigmatic), highlighting recent research showing that the human mind truly works in story form. Children learn to think by learning to create stories; adults organise their world—to a surprising extent—by telling stories to themselves and to others.

Narrative vs. paradigmatic thinking

One of the great projects of the Enlightenment was to replace narrative knowledge with scientific (or paradigmatic) knowledge, which was considered to be the only knowledge that guaranteed "truth". With the emerging emphasis on science to provide rational and objective analysis of all things, narrative ways of knowing were widely discounted and distrusted. The prevailing attitude was that paradigmatic approaches to law and the humanities would engender moral progress, a fair and righteous society, autonomous art, and happiness. (Nymark, 2000 p. 20) According to Denning, the trend to see all

important knowledge as paradigmatic began with the Enlightenment and lasted until the end of the last century. (Denning, 2001a p. xv)

Since Lyotard (1984), the literature has emphasized the distinction between two modes of knowledge—the paradigmatic and the narrative. Indeed, Lyotard's view is that some knowledge cannot be reduced to a scientific format, and that paradigmatic knowledge exists in conflict with another kind of knowledge, which Lyotard terms "narrative". Lyotard was inspired by the role of narrative knowledge throughout Western culture prior to the Enlightenment. Pre-Enlightenment "narratives were popular stories, myths, legends, or tales... [These stories] oriented social action because they gave meaning to life. People made sense of who they were and what they might aspire to by appealing to narratives." (White, 1992 p. 81)

Today, there is a growing body of research that suggests that people actually think in story form, rather than in logical or rational manners. This change in attitude is happening because studies are increasingly showing that it is by the natural process of creating stories that human beings effectively <u>learn</u> to think. (Czarniawska-Joerges, 1997a, Denning, 2001a, Polkinghorne, 1988) For De Certeau, the storyteller, who guides the story through all its turns and detours, is simply exercising "the art of thinking." (De Certeau, 1984 p. 81) Weick declares categorically: "people think narratively rather than argumentatively or paradigmatically." (Weick, 1995 p. 127)

According to Turner (1996), the language of the brain is narrative; it is by creating stories that human beings discover how to reflect, to organise and make sense of the world. Polkinghorne, invoking the thinking of Levi-Strauss, contends that myth and story are not merely tales but *devices to think with*, ways of classifying and understanding reality. (Polkinghorne, 1988) As Nicholson puts it: "Stories are our favourite ways of making sense of the world... The whole point about narratives is to give us maps that help us navigate life." (Nicholson, 2000 pp. 211, 215) In other words, crafting and telling stories is the most natural of human activities; we do it all the time in our minds, and we use out stories to make sense of our world. (Trelease, 2003)

Life is a story

For Lakoff and Johnson (1980), the "life is a story" metaphor is deeply rooted in our culture. Shamir adds that "we tend to assume that everyone's life is structured like a story, and we give coherence to our life by viewing it as a story." (Shamir et al., 2002) According to Mangham and Overington, as well, seeing life in story form is an inevitable element of the human condition: "If we listen carefully to the talk around, it is not difficult to think that storytelling goes on almost non-stop. People transform their lives and their experiences into stories with practiced ease." (Mangham and Overington, 1987 p. 193) Fleming adds: "As individuals, we all relate to stories because our lives are stories. Every individual life contains characters, plots, scripts and a host of other ingredients found in a good story." (Fleming, 2001 p. 35) In our minds we are constantly telling ourselves stories and organising the world around us to fit into our stories. (Sheehy, 1995 p. 169)

Indeed, since the narrative instinct is so firmly imbedded in the human mind, efforts to shut off narrative thinking in the interest of purely rational and scientific analysis may be misguided, even doomed to failure. In an enlightening study of the way physicians make diagnoses, Elstein, Shulman and Sprafka (1978) found that the process was actually more narrative than rational, despite the rational and scientific training of medical school. In fact, the physicians in the study generated stories and scenarios from the beginning, and then used these scenarios to direct their examinations.

Children learn in story form

For Brooks, this practice of identifying stories starts early in childhood: "The desire and the competence to tell stories...reach back to an early age in an individual's development, to about the age of three, when a child begins to show the ability to put together a narrative in coherent fashion..." (Brooks, 1984 p. 3) McAdams opines that stories are the way humans learn to understand the world, and that narrative organisation of thought begins in early childhood. (McAdams 1993 pp.35-6) Not only do children become creators and consumers of stories, the way adults interact with them turns children into story *tellers* at a young age. (Schank, 1990 p. 236) As parents and teachers encourage youngsters to recount what happened to them, narrative thought patterns come to dominate the child's cognition in general. Developing narrative competence is critical to the process of learning

to think and to deal with complexity. (Kemper, 1984 p. 99)

To Bettelheim, the stories of the young child, the fairy tales, teach the child to reflect on his problems, on how to structure his world, on how to make sense of his emotions and how to find solutions to life's early dilemmas. (Bettelheim, 1976 p. 5) Stories may be even far more important to a child's development than writers and psychologists believed in the past. For decades, it was believed that children had short attention spans, and that they could only focus on one thing at a time. In fact, research has now shown that even pre-school children are capable of understanding complex narratives. (Anderson and Lorch, 1983, Gladwell, 2000 p. 118) In addition, Bruner notes that children remember things by turning them into stories, and that this form of recall continues throughout life. (Bruner and Luciardello, 1989)

Adults think in story form

While Gardner, McAdams, Bettelheim and Anderson often focus on the importance of stories in developing the *child's* ability to think, an increasing number of psychologists and authors appear convinced that it is not only children who think in narrative form. (Gardner and Laskin, 1995 p. 44) Fulford makes the point that adults never lose the innate tendency to use stories to make sense of the world: "The need to shape the past as a coherent narrative will not leave us." (Fulford, 2000 p. 59) In Fulford's view, adults as well as children actually <u>need</u> stories and storytelling to make sense of their world. Simmons agrees, stating that we come to understand the world by choosing among stories, finding the ones that make the most sense. (Simmons, 2001 p. 229) Computer scientist Roger Schank writes that all thought happens in story form; we need stories because they form the basic structures of all thinking and understanding. (Schank, 1990 p. 219)

The idea that stories are a basic human need is echoed by other voices. Rafe Martin writes that we need stories to make sense of the world. Without stories, human existence, or at least meaningful existence, dies. (Martin, 1999) Stories are also necessary for sanity: "People who don't have stories in their cultures go nuts." (Shepard, 2003) Le Guin, as well, feels that the human experience is incomplete if divorced from narrative, asserting that "a person who had never listened to nor read a tale or myth or parable or story, would remain ignorant of his emotional and spiritual heights and depths, would not know quite

fully what it is to be human." (Le Guin and Wood, 1979 p. 31) For his part, Lopez proclaims: "Sometimes a person needs a story more than food to stay alive. That is why we put these stories in each other's memory." (Lopez, 1990 p. 48) Neil Postman, a New York University professor of communication arts and sciences, uses the following comparison to describe the power of stories in sustaining meaningful human existence: "Without air our cells die. Without a story our selves die." (Zemke, 1990 p. 44)

While this concept, that human beings need stories to stay alive, may appear extreme, it seems to be a recurring theme in literature. For example, Blixen is convinced that stories have sustained the human race, as much as bread or water: "Stories have been told as long as speech has existed, and *sans* stories the human race would have perished, as it would have perished *sans* water." (Blixen, 1986 p. 23) In the metaphorical world of Muriel Rukeyser, the basic matter of the cosmos is narrative. Whereas physical matter may consist of atoms and molecules, the meaningful part of life—psychic and spiritual matter—consists of stories. As she states: "The universe is made of stories, not atoms." (Rukeyser, 1968) To Hardy, stories are life itself; we need story to perform the basic tasks, and feel the basic emotions, of being: "we dream in narrative, remember, anticipate, hope, despair, believe, doubt, plan, revise, criticise, construct, gossip, learn, hate, and love by narrative." (Hardy, 1968 p. 5) Byatt shares this sentiment, affirming that stories form the very lifeblood of human existence: "Narration is as much part of human nature as breath and the circulation of the blood." (Byatt, 2000 p.166)

The narrative mind

Turner states clearly that stories are not an optional activity but rather an inevitable and required component of human thought. Human beings need stories to order their world and construct their sense of meaning. (Turner, 1996 p. 13) For Calvin, stories are the fundamental instrument of thought, and our chief means of planning the future. (Calvin, 1994 p. 103) Reflecting on Turner's work, Fulford concludes that stories are nothing less than the building blocks of all human thought. So, asks Fulford: "Does this account for our *need* to tell stories and listen to them?" (Fulford, 2000 p. 82) Computer scientist Roger Schank's years of research and thinking about humans and machines have led him to conclude, as Turner, that human thought and storytelling are inextricably linked. The *sine qua non* of artificial intelligence involves teaching machines to use story, since "intelligent

machines would be good storytellers." (Schank, 1990 p. 241)

3.3.2 Stories are the way we learn, teach and remember

Since human beings think in narrative form, stories are also the way the individuals learn most effectively. They are also the most effective vehicle for sharing knowledge.

Narrative imitates life, so stories "fit" naturally into the brain

According to Schank, we understand life by creating stories that explain it; we learn by adding and understanding new stories. From new events, to personal problems, to relationships, we understand them in story form. "We also understand just about everything else this way as well." (Schank, 1995 p. 219) If such is the case, if narrative is so central to learning, then what could be more natural than teaching and learning with stories?

Several scholars make the point that stories "fit" naturally into the brain, and that they are central to learning. (Fulford, 2000 p. 38) (Simmons, 2001 p. 127) (Finlay and Hogan, 1995) Orton explains that storytelling increases concentration by producing a sense of excitement: "Stories enhance attention, create anticipation...They provide a familiar set of 'hooks' that allow us to process the information that we hang on them." (Weil, 1998 p. 38) Denning concludes that narrative slides neatly into the human mind, while logic and analysis do not. (Denning, 2001a p. xvi) This insight led to his decision to place storytelling at the centre of the World Bank's knowledge management strategy.

Research shows that people tend to remember stories with far greater clarity than any other form of discourse. For example, a study from the late 1990s presented American high school students with similar information in various formats. Researchers concluded that the more anecdotal the style, the more students remember. Story-based information was retained up to three times more than the same information presented in textbook style. (Shaw et al., 1998b p. 42)

Stories give us context and meaning, so we remember them "whole cloth"

Since stories provide a context, we remember them effortlessly, in their entirety and in all their complexity. (Holden and Steinauer, 1999 p. 65) Simmons uses the expression "whole cloth" to describe the way stories aid in remembering, calling them "a mnemonic device for complex concepts" (Simmons, 2001 p. 125) Shaw and his co-authors would appear to agree, as they state: "A good story...defines relationships, a sequence of events, cause and effect, and a priority among items—*and those elements are likely to be remembered as a complex whole.*" (Shaw et al., 1998b p. 42 emphasis in original text) Parkin describes a learning experiment where two groups of students were asked to recall a list of 20 everyday objects, presented to one group as a list to memorise and to the other as a story. The "story" group was able to remember far more. (Parkin, 1998 p. 31)

Schrage writes that stories provide us with a context and thus a guide for making sense out of the complex or convoluted. (Schrage, 1998, p. 20) As CEO of Wall Street investment firm Mosaic Capital since 2001, Ameet Shah has become a proponent of storytelling for selling investment ideas. As he receives countless proposals and sees numerous presentations from start-up firms every year, he has come to believe that the best way for an entrepreneur to make a distinctive argument that "stands out from the crowd" is through a compelling story that puts the business idea in context. (Sadowsky, 2005) As Shah asserts, complex explanations of technology are boring, while stories entertain and inspire. The best way to bring your audience into the future is paint that future, and put it into context, with your stories.

In the comments of investment and innovation professionals such as Schrage and Shah, we see that even in the most technical and number-oriented of arenas—Wall Street, for example—a good story is our best device for explaining complex concepts.

Stories stick - they are more memorable and persuasive than other discourse

Stories tend to stick with us longer than abstract ideas. (Hansen and Kahnweiler, 1993 p. 1393) The research of Wilkins (1983, 1984) in the early 1980s demonstrated clearly that story-based discourse is far more memorable and meaningful to people than any other form of communication. Wilkins points to other research which "suggests that information is

more quickly and accurately remembered when it is first presented in the form of an example or story." (Wilkins, 1983 pp. 48-9) In-depth studies by Martin et al. (1979) support the concept that case examples or stories are recalled more easily and more completely than information presented in the form of statistics or abstract argument. Further research by Martin and Powers (1980, 1983a) showed that the more concrete a story is, the more accurately it is recalled.

Some authors opine that stories are powerful because they touch the entire brain—the right (feeling) hemisphere as well as the left (logical and rational) hemisphere, the subconscious as well as the conscious. Thus, we simultaneously *feel* the stories as well as understand them. (Neuhauser, 1993a p. 5) (Simmons, 2001 pp. 29-30) Bernard Uzan, a former director of the Opera of Montreal, has long espoused theatre and storytelling techniques for all types of learning, because connecting a lesson to a story allows students to feel things, as opposed to merely understanding them. (Sadowsky, 1982) Similarly, Choy explains that story touches something in our common emotional experience, allowing teller to bridge distance with the listeners (Choy, 1998 p. 96) Due to narrative's richness of detail and its ability to involve us vicariously, we *feel* a story in ways that we cannot possibly feel with rational argument. (Wilkins, 1983 p. 89)

Thus, when we hear the well-told story of a business idea, we may experience it vicariously, and with all the passion of the teller. (Wilkins, 1984) A well-conceived and well-told story is an effective tool of influence because it leaves the listeners with vibrant and unforgettable images. (Simmons, 2001 p. 123) Alex Kroll, former CEO of Young and Rubicam, talks of marketing, branding, and the role of stories in similar fashion. In his foreword to Mark and Pearson's *The Hero and the Outlaw*, Kroll writes that branding "is about finding the right story" to insure that the message is absorbed and remembered. (Mark and Pearson, 2001 p. vii)

The message of Kroll, Simmons, Wilkins, Denning and other proponents of storytelling is clear: In today's world, we remember a good story because it cuts through the clutter that pervades our business lives. Stories are the vehicle that best allows a message to be absorbed, internalized, and remembered.

Stories help us learn to deal with complexity

Numerous authors state that one of the great virtues of story is that it helps us come to grips with—and learn to function in—complex circumstances, whether the complexity involves understanding intricate systems and concepts (e.g. a foreign culture or "company values"), making decisions under pressure, or resolving moral/ethical dilemmas. (Denning, 2001a, Neuhauser, 1993a, Nicholson, 2000, Schank, 1990, Simmons, 2001, Wilkins, 1983)

Denning simply states that stories are the route to understanding an organisation's values. (Sadowsky, 2001a) In fact, any vague or difficult-to-define concept—such as corporate values, principles, or ethical guidelines—is best understood or taught through the stories told in the organisation. (Snowden, 1999 p. 30, Simmons, 2001 p. 30, Davenport and Prusak, 1998 p. 82) James Hackett, CEO of Steelcase, Inc., feels that storytelling is invaluable in his company for the purpose of teaching and promoting the group's underlying ideology. As he comments, "stories do more to teach integrity in our company than anything else." (Hackett, 2003 p. 151)

Human beings learn to make high-pressure, complex decisions by creating stories and scenarios, rather than by learning procedures and lists of things to think about. (Simmons, 2001 p. 234) That is why we need story, far more than defined systems and procedures, to help us learn and master this type of quick-response-under-uncertainty activities. Cognitive psychologist Gary Klein has studied for more than twenty years people who make split-second decisions that can have a life-or-death impact—for example, fighter pilots, critical care nurses, and fire commanders. In these high-pressure circumstances, the stories and scenarios stored in the decision-maker's brain are far more likely to guide decisions than are any pre-established rules, policies, or guidelines. (Klein, 1998 p. 189)

Similarly, when faced with a complex learning situation, such as figuring out how a foreign culture functions, human beings rely on learning through stories. (Schank, 1995 p. 204) According to Denning, we learn how an organisation functions in a similar manner. An organisation is a complex structure; as is the case with any culture, it can only be truly understood by knowing its stories. (Denning, 2001a p. 115) Denning's comments reflect an opinion that is shared by a growing number of organisational scholars (Stewart, 1998, Stone, 2003 among others, Neuhauser, 1993b, Czarniawska-Joerges, 1998, Linde, 2000): knowing an organisation, and truly comprehending it in all its complexity, means having a

thorough understanding of its stories.

3.3.3 Since we teach and learn in story form, stories are the best way to share knowledge

Davenport and Prusak opine that "human beings learn best from stories...This precept has always been intuitively clear to anyone who teaches." (Davenport and Prusak, 1998 p. 81) In addition to their own examination of corporations, the authors cite studies about the role of rhetoric and stories in various fields, including economics, organisational behaviour, law and theology. In every one of these fields, "research shows that knowledge is communicated most effectively through a convincing narrative." (Davenport and Prusak, 1998p. 81) Honey believes that people learn best trough narrative, and he uses stories extensively in his classrooms. As he describes: "Many times I have had a former student remark to me, 'Remember when you told us that story where....' It's then that I know the lesson has not been lost." (Honey, 1992) As someone who has taught often in my career, I can state that I fully agree with those who assert that knowledge is best retained and shared in story form. Years after a class ends, students who return to see me will often recall stories from the classroom; rarely do they remember the technical detail from a lecture or a textbook.

Stories, communities and knowledge management

Stories are often where an organisation stores its tacit knowledge and its most useful information. (Brown and Duguid, 1991, Davenport and Prusak, 1998, Denning, 2001b, Stewart, 1998, Wenger, 1998) At Armstrong Furniture, for example, stories—more than policy statements or service manuals—hold the cultural and practical knowledge that is critical to the efficient operation of the business. (Armstrong, 1992) In an often-cited case of organisational learning and sharing of tacit knowledge, Xerox copier repairmen learned more about fixing their machines from telling stories at morning coffee than from manuals or formal training. (Orr, 1996) Weick notes that stories have a unique capacity to "embody experience and apply it to future expectations", and that storytelling is effective for transmitting tacit knowledge because it permits "a rich and complex understanding" of

events, situations and behaviours. (Weick, 1995 p. 61)

Indeed, storytelling plays a significant role in learning and innovation in numerous organisations. In *Serious Play*, a study of innovative organisations and their corporate cultures, Schrage affirms that storytelling facilitates the collective collaboration that leads to innovation. (Schrage, 1999) Cooper and Sawaf write of studies which "show that many of the world's leading companies with an institutionalized capacity for innovation build such capacity through stories." (Cooper and Sawaf, 1997 p. 189) One prominent and well-documented example of a company that takes pride in its innovation, considers itself a storytelling organisation, and makes a connection between storytelling and innovation is 3M. (Shaw et al., 1998a, Buckler and Zien, 1996)

Knowledge sharing happens most effectively in communities. (Brown and Duguid, 1991)(Brown & Duguid, 1991, Simmons, 2001, Stewart, 1997) In particular, researchers who study how people and groups learn have discovered the importance of a certain type of group called a "community of practice". (Brown and Duguid, 2000, Wenger, 1998) A community of practice is a group whose members bond informally, drawn together from exposure to common problems and pursuit of common solutions, so that they themselves embody a store of knowledge. (Stewart, 1998)

While the term "community of practice" may not have been invented at the Institute for Research on Learning, that's where much of the innovative research about these communities has been performed, largely under the leadership of Etienne Wenger. In general terms, the fundamental finding of IRL's work is that learning is a social activity, often happening in informal settings and through the vehicle of storytelling. (Wenger, 1998, Stewart, 1997) For Stewart (1998), communities of practice are essential for building the human and intellectual capital of the corporation. Wenger (1998), as well, sees these communities as the core building blocks of group learning, and a key element of organisational success.

In turning the World Bank into a pioneer in knowledge management, Denning relied heavily on the notion of community of practice. When he "discovered that he learned more from trading stories in the cafeteria than he did from reading the bank's official documents and reports" (Pink, 2006 p. 107), Denning began to realize that an organisation's useful knowledge is contained in its stories. While storytelling certainly formed the base of Denning's knowledge management strategy, creating the communities

of practice that used storytelling was a critical element of the solution. (Sadowsky, 2001a)

Similarly, Xerox's John Seely Brown describes the company's efforts to use artificial intelligence to train and develop field technicians, with the goal of making them better trouble-shooters. At such an advanced technology firm, the original thought was to provide them with state of the art, high-tech tools for diagnostics, and databases for reference. Despite the company's efforts to refine its technological solutions, the way knowledge was shared most effectively turned out to be extremely traditional: they gathered and told stories of their experiences. (Orr, 1996) Rather than the high-tech solution they had envisioned, they created—with two-way radios—a virtual community of practice where the storytelling was continuous and ongoing. (Schrage, 2000 p. 206)

Teaching and disseminating complex ideas

When Jack Welch wanted to influence the corporate culture of General Electric, to redefine the "feel" of the company, he accomplished it far more through his storytelling than through his memos or statements of policy. By his own account, when he saw positive cultural changes in one part of the GE, he would spread the lessons by telling these stories across the entire company. As he describes: "The changes at our nuclear reactor business...gave me important weapons to demonstrate what I wanted GE to 'feel' like. I told their stories again and again to every GE audience at every opportunity. For the next 20 years, I used that same storytelling technique to get ideas transferred across the company." (Welch and Byrne, 2001 p. 104) Particularly in large organisations such as GE, well-conceived and well-utilized stories have a unique power to disseminate complex ideas and encourage buy-in. In fact, when Welch was asked about the single most important attribute he had, he responded: "What really counts is that I'm Irish and I know how to tell stories." (Brown, 2005 p. 5)

Encouraging groups to share tacit knowledge, and to learn from each other's behaviour, is an arena where storytelling truly shines. (Stewart, 1998 p. 78) Thus, Klein found that groups in high pressure jobs improved their reactions and performance through telling their stories. (Klein, 1998 p. 189) Others, as well, write that bringing a group's tacit and complex knowledge to the surface is a central function of storytelling. (Snowden, 2000, Wenger, 1998, Schrage, 1999) The cases of the Xerox repairmen and the KM project at

the World Bank indicate that the stories of the community are perhaps the most effective vehicle for knowledge sharing, particularly when the knowledge in question is tacit and complex. As David Snowden, an expert on tacit knowledge at IBM Global Services asserts: "In spite of all our sophisticated communication technologies, stories are still the way we communicate complex ideas." (Sadowsky, 2001b)

One reason that storytelling may be the most effective way to share knowledge is simply that people enjoy it! (Keen and Fox, 1989, Simmons, 2001) People willingly share stories, whereas they tend to hold back other types of information. (Denning, 2004c, Neuhauser, 1993b) As such, Denning's efforts to implement the complex KM project at the World Bank had met with apathy and indifference when he relied on traditional methods. When he switched to an anecdotal approach, employees shared their stories enthusiastically. (Davenport et al., 2003)

Efforts to codify tacit knowledge

For me, one of the most intriguing aspects of this discussion of knowledge management is that a majority of the authors I have cited are educated as scientists, and they have spent most of their careers in the rational worlds of science and technology. I refer specifically to Schank, Davenport, John Seely Brown, and Denning, all of whom describe themselves and their careers as scientific above all else. What is striking to me is a common theme along their paths: In each case, it was their efforts to investigate knowledge management solutions using technology that led them to a firm belief in the virtues of storytelling as the most effective way for organisations to spread and share their knowledge.

If specialists are concluding that complex, tacit knowledge is best shared in story form, what can we say about efforts to encode it using computers and technology? In an argument that echoes the findings of Denning, Davenport and Prusak argue that "trying to turn knowledge into a 'code' would seem to defeat the purpose of communicating it through resonant storytelling." (Davenport and Prusak, 1998 p. 82) Schank, who is one of the leading experts worldwide in the applications of artificial intelligence, is somewhat pessimistic with regard to the current state of technology, saying that machines will not truly help with knowledge management until they become more 'human' in their ability to understand and tell stories. (Schank, 1995) Similarly, in her work as a consultant,

Simmons has come to the conclusion that encoding tacit and complex knowledge is a difficult task for machines, since stories do not fit neatly into database structures. (Simmons, 2001 p. 197) In his role as Chief Scientist at Xerox, John Seely Brown came to the conclusion that coffee pots and water coolers were the most effective vehicles for knowledge sharing, for these are the places where the copier repairmen told their stories and exchanged their tips. (Brown, 1991)

Rather than focusing on the technology to manage the knowledge, some scholars and authors advocate creating an environment favourable to sharing tacit information. (Wenger, 1998, Brown and Gray, 1995, Stewart, 1998, Stewart, 1997, Denning, 2004a) If tacit knowledge is shared informally and through storytelling, around coffee pots or in communities of practice, the critical question becomes how to create these informal communities. Thus, the two-way radio solution at Xerox worked well, since connecting the repairmen by radio created a virtual community of practice, allowing stories and suggestions to pass continuously among group members. Brown came to realize that the truly important part of the process lay not in using a specific technological tool, but rather in providing participants the vehicles and environments for telling, sharing, and comparing their stories. (Brown and Duguid, 1991)

Stewart claims that many companies and managers must learn that "stories are not a distraction from work—they are the fabric of it." (Stewart, 1998 p. 79) As Xerox discovered, telling stories around the coffee machine can be an essential form of organisational learning. This sentiment is echoed by Hewlett-Packard's Cauzid, who often used this informal channel to send his own important messages. As he describes: "As my career evolved, I realized more and more the importance of our coffee machines at HP Grenoble. Sure, some of the time is wasted in idle chitchat, but as I studied the question, I realized that there is far more productive time than wasted time. Sharing our stories is the way we learn and evolve." (Sadowsky, 1999)

3.3.4 Alternatives to storytelling for knowledge management

Although stories have proven to be an effective device for conveying knowledge in organizations, there are also a number of other strategies or modes which may accomplish

similar outcomes. Of course, these devices are not necessarily used in isolation, and they may be consciously combined for greater effect.

According to Sole and Wilson (2002), a partial list of other knowledge sharing modes that are broadly used in organizations would include:

- *Storytelling*: Sharing of knowledge and experiences through narrative and anecdotes in order to communicate lessons, complex ideas, concepts, and causal connections.
- *Modeling* is the sharing of knowledge and experience through exposure to both the conscious and unconscious behavior of others, particularly 'experts'. Examples of modeling include mentoring, apprenticeship, symbolic conduct, and specific demonstrations.
- *Simulations*: Sharing of knowledge and experience through experiential situations that recreate the complexities of action. Examples of simulations include case studies and role playing.
- *Codified Resources*: *Sharing* of knowledge through reference to formal, systematic and structured sources, for example memos, manuals or databases in which knowledge has been formally described and codified.
- *Symbolic Objects*: Sharing of *knowledge* through access and exposure to images, diagrams or other objects which represent or illustrate the underlying knowledge or concept. Examples include maps, prototypes, logos or generic symbols such as the peace sign.

Storytelling vs. other devices, particularly modeling

From these definitions, one can certainly see that there is overlap between the various techniques. For example, corporate storytelling or modeling may involve simulation, and indeed simulation may call upon company symbols or codified resources—memos, logos, or policy manuals, for example. Sole and Wilson (2002 p. 7) point to the example of DuPont, a company that uses all of the methods cited above in their effort to share knowledge and dispense information about employee behavior and conduct:

> DuPont, an industrial company renowned for its on-and-off-the-job safety record, despite operating in a notoriously dangerous industry (chemicals manufacture), uses all these modes to convey to new and existing employees the company norms and values regarding safe working practices. Employees receive instructions for Safe Operating Procedures in their work activities (codified resources). They are prompted to appropriate behavior by

> prominent signs indicating 'Hard hat area' or 'Safety glasses required' (symbolic objects), or by seeing their supervisors wearing the appropriate safety gear (modeling). Local workgroups have regular "safety meetings" when they review different aspects of their work and intentionally explore better, safer ways to operate (simulation). When accidents do happen, these are analyzed, documented, and circulated to the whole company, in a narrative describing the accident, the painful outcome, the safe practice violated, and the recommended response for similar situations (storytelling).

In particular, "stories" and "models" may have strong overlapping elements, as a model can often be viewed as simply the embodiment of a story. Certain authors, in fact, consider that modeling and storytelling are closely related, or that modeling is indeed a form of storytelling. (Collins, Brown and Newman 1989; Wirth 2006) When an expert or experienced member of an organisation uses modeling to make a point or to demonstrate a behavior, he will often illustrate his thought process by telling his story in the first person. (Burke 1998; Edelson 1998)

In the context of knowledge sharing and knowledge management, stories have been shown to suffer from certain limitations. Therefore, combining storytelling with other techniques can increase its effectiveness. For example, Cohen and Tyson (2002) state that stories often have a single point of view—that of the individual storyteller—and may thus lose the ability to connect with diverse individuals throughout an organization. Roth and Kleiner (1995) propose the creation of what they term a "learning history" that weaves together quotations and stories from multiple organizational players.

This learning history dynamic, in its goal of speaking meaningfully to the broad organization, portrays the appropriateness of a variety of behaviors (models), and is thus closely related to the notion of modeling. (Roth & Kleiner, 1995; Kleiner & Roth, 1997) Boje (1995) points to the popularity of *Tamara* – a play in which dozens of characters simultaneously unfold their stories not on a single stage but as small groups that audience members from room to room, attempts to break the "single perspective" limitation of storytelling by proposing multiple models and points of view.

Combining techniques: storytelling and modeling together

Other than the "single point of view" trap, Sole and Wilson (2002) cite the seductiveness of story, and its static nature, as the two major pitfalls when using storytelling for

knowledge management. In this vein, we reiterate the usefulness and advisability of utilizing a multiplicity of voices and approaches. To combat the "static-ness" of a story, it should be updated with input from various sources. For example, Ruggles (2002) opines that knowledge sharing stories used in organizations should be revised and reworked, from various points of view, to avoid "petrification". He makes a comparison between organizational stories and Harvard Business School cases, many of which are modified to be used year after year—while the core messages and learnings remain constant.

The pitfall of seductiveness—that the vividness and eloquence of the delivery may in fact distract from the true purpose of the telling—also argues for approaches that merge varied methods and voices. In particular, storytelling, modeling and simulation can be used quite effectively in combination, to build and rebuild trust and commitment. (Sole and Wilson 2002; Boje 1995) In some contexts, because of the seductiveness trap, modeling or simulation may prove superior to storytelling in sharing knowledge and determining behavior. Ibarra (1999), for example, found that investment banks used modeling with more success than storytelling. Thus, junior investment bankers, in their efforts to develop a successful professional image, substantially model their behavior on that of successful senior partners. In circumstances where the development of deep, skills-based knowledge by relatively few people is the objective, modeling and simulation can be more appropriate than storytelling for the sharing of knowledge. (Sole and Wilson 2002; Cohen and Tyson 2002)

For knowledge sharing, modeling may indeed be more effective than storytelling in a number of contexts. According to Sole and Wilson (2002), it appears that storytelling may be highly effective for getting simple tacit ideas across to a wide audience quickly. When the knowledge sharing concerns more complex and subtle behavior—as in the case of the investment bankers cited above—modeling may prove more appropriate. In many cases, though, storytelling and modeling must go hand-in-hand to achieve authenticity. Management teams can tell stories about honesty, write policies about it and devise logos that symbolize it, but if leadership is caught telling a story of behavior while failing to model that behavior, this lack of authenticity will negate the impact of all these other knowledge-sharing devices. (Martin and Powers 1983)

The effectiveness of modeling might also explain recent interest in the phenomenon communities of practice. In communities of practice, participants share their stories and

experience, as well as their entire "repertoire of resources" (Wenger, 1998) including symbols, objects, and codified behavior. Along with this sharing, expertise is made visible, and the most experienced and skillful members are valued for modeling appropriate modes of conduct and proficiency for the less experienced associates.

3.4 STORIES ARE OUR MOST EFFECTIVE FORM OF COMMUNICATION

In this section, I detail the reasons why story is such a highly effective medium. In particular, we visit the ability of story to engage us on a deep emotional level (3.4.1), to paint pictures that are more believable than other forms of discourse (3.4.2), and to include all members of an organisation due to their non-threatening and non-hierarchical nature (3.4.3).

In the business literature, numerous are the references to story as the most persuasive and inspirational way for human beings to communicate. (Lawrence et al., 2006 p. 60, Neuhauser, 1993a p. 151, Stewart, 1997 p. 78, Simmons, 2001 p. 23) Social psychologists have long explained that rhetorical devices—such as story, analogy, and metaphor—are more persuasive and effective than other methods of communicating concepts. (Borgida and Nisbett, 1977, Conger, 1991, Zemke, 1990, Lakoff and Johnson, 1980) Facts, statistical summaries, and corporate statements of policy are often treated as abstract, bland and uninspiring. Stories, on the other hand, present information in a way that is easily remembered and more readily believed. (Wilkins, 1983, Pearce, 1995, Walton, 2004) Thus, narrative-based discourse impacts an individual's beliefs far more than any other type of communication. (1983b, Martin and Powers, 1983a, Wilkins, 1983)

Both Tichy and Gardner consider the ability to create and tell stories of identity a *sine qua non* of true leadership. Tichy elucidates this concept in his discussion of the leader's "teachable points of view", which must be expressed in the form of personal stories. (Tichy and Cohen, 1997 p. 175) For Gardner, "the artful creation and articulation of stories constitutes a fundamental part of the leader's vocation", and these well-crafted stories constitute "the single most powerful weapon in the leader's literary arsenal." (Gardner and Laskin, 1995 p. 42)

3.4.1 Stories have the power to connect with us at a deep level

Stories can move us deeply because they touch our emotions

Various voices endorse story's ability to reach us at a deeper level than other types of discourse. Chinen quotes an old Hasidic proverb that states: "Give people a fact or an idea and you enlighten their minds; tell them a story and you touch their souls." (Chinen, 1993 p. 2) Similarly, Cooper and Sawaf write that stories "touch us in the heart the way no flowchart or rational argument ever can. They change us." (Cooper and Sawaf, 1997 p. 189) In contrast to story, logic and rational argument have clear limits, and analysis alone often does not reach us deeply enough to trigger deep change. (Kotter and Cohen, 2002 p. 12, Denning, 2004c p. 123) Only story has the power to trigger true transformation. (Denning, 2001b, Tichy and Cardwell, 2002, Simmons, 2001)

Gardner states simply that stories are the most powerful form of argument because "stories speak to both parts of the human mind—its reason and emotion." (Gardner and Laskin, 1995 p. 42) Similarly, McLellan explains that it is only through story that a speaker can reach listeners on both a rational and an emotional plane. (McLellan, 2003) In fact, stories connect by touching the limbic (emotional) brain as well as the cognitive (logical) brain, whereas rational discourse engages only our cognitive side. Goleman (2001) argues that the most effective leaders inspire others by reaching them emotionally, and that this influence indeed happens through the limbic brain. In *A General Theory of Love*, Lewis, Amini, and Lannon explain this power of the limbic system to influence feelings and attitudes. (Lewis et al., 2000 p. 63) Indeed, stories have a unique ability to influence because they speak to the limbic brain far more than do other modes of discourse.

Involving people's emotions is crucial to any leadership event. (Pearce, 1995 p. 32, Lohr, 1994 p. 1, Gahmberg, 2002) Kotter asserts that any change effort must reach the limbic brain because "the heart of change is in the emotions." (Kotter and Cohen, 2002 p. 2) Neuhauser reminds us that the only way to involve the whole brain—emotional and rational, limbic and cognitive—it through story, since "stories allow a person to feel and see the information as well as factually understand it." (Neuhauser, 1993a p. 5)

Stories induce an altered state of mind

Researchers in speech communications explain that storytelling has the power to transform the mindset of a listener. Listeners often remain passive when hearing lectures, analysis or rational discourse. Stories, on the other hand, "excite the imagination of the listener...The listener is not a passive receiver of information but is triggered into a state of active thinking." (Osborne and Ehninger, 1962 p. 228) Thus, storytelling triggers a heightened state of awareness, as the listener considers the meaning of the story and tries to make sense of it. Through the storytelling dynamic, the listener is engaged and stimulated; attention and interest are increased. (Kouzes and Posner, 1993 p. 198)

According to Simmons, stories have the power to produce an altered state of awareness among the listeners, even a dream-like state where they become increasingly imaginative and receptive. (Simmons, 2001 p. 126) Honey (1992) agrees that telling a story can change people's mindset: "Present a good story", he writes, "and everyone becomes less analytical and more emotionally involved." In this state, people are more able to dream, to see a picture in their minds, and to imagine positive future scenarios.

As Tichy (1997) emphasizes, winning leaders tell the future stories that allow followers to see better worlds, and to go there in their imaginations. In extreme cases, the effect of a vivid tale can be dramatic, even life-changing. Such was the case of the team that built the first Macintosh computer at Apple in the early 1980s. When the charismatic Steve Jobs convinced the group that they were destined to "put a dent in the universe", team members "acted as if on a mission from God". (Levy, 1995 p. 142) In his memoirs, former CEO John Sculley recalls his impressions upon meeting the Mac team: "It was almost as if there were magnetic fields, some spiritual force, mesmerizing people...Excitement showed on everyone's face. It was nearly a cult environment." (Sculley and Byrne, 1988 p. 131) When we read such descriptions, we feel the immense transformational power of story, and the metaphorical words of Brian Andreas seem less of an exaggeration: "Our stories make the dead dance and the living soar. They turn water into wine and rocks into gold. They give us power beyond our wildest dreams". (Andreas, 1998 "Introduction")

Gaulke says that stories grab an audience's attention, causing everyone to perk up and listen. As she explains: "When a speaker uses a story...eyes look up, doodling stops; they become still and quiet." (Gaulke, 1997 p. 42) In *The Gutenberg Elegies*, a treatise on the

importance of narrative in an electronic age, Sven Birkerts (1994) argues that no effort is necessary to enter a story. Story relaxes us, and we follow it so naturally that the process is automatic. By contrast, Denning argues, readers or listeners cannot get "inside" abstract thought. Rather, analytical or rational discourse leaves us as perpetual spectators, self-conscious and external. (Denning, 2001a p. 66)

Both Finlay and Simmons assert that stories aid in learning because they relax the listener. (Finlay and Hogan, 1995, Simmons, 2001 p. 126) To Denning, story telling and listening are not only relaxing, they are energy-generating. (Denning, 2001a p. 67) In fact, there may be physical evidence that story can make us simultaneously more calm and responsive. Researchers in California have shown that during a story listeners experience a biochemical and hormonal changes that relax listeners and engage the right brain. (Garmston, 1994 pp. 60-1)

Stories paint the pictures that make transformational leadership possible

In emphasizing the point that meaning-makers in organisations inspire others by painting vivid pictures of the future, Joe Raelin quotes the famous French aviator and author Antoine de St. Exupéry, who wrote that "if you want to build a ship, don't drum up the [crew] to gather wood, divide the work, and give orders. Instead, teach them to yearn for the vast and endless sea."[3] (Raelin, 2006 p. 61) In other words, tell a story that provides the image of a positive future, and make them protagonists in that story.

According to biographer William Manchester (1983), Winston Churchill was successful because he painted an image of a positive future, inspiring Britain to rise up and participate in the war effort. Churchill was a rare master of verbal persuasion because he was able to portray the type of virtual pictures that move people to their core. (Neuhauser, 1993a p. 97) Just as Churchill painted vibrant portraits of a better future for Britain, Jack Welch told GE's "future story" with lively imagery that spoke to the emotions of his followers. After making his case for change, "Welch moved on to describing a new future for

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[3] This quote is from "The Wisdom of the Sands" translated by S. Gilbert from the French "Citadelle" (Chicago: University of Chicago Press 1979)

GE...On the emotional side, he described a new GE that would be a very different place to work. GE would be 'the world's most exciting enterprise.' Where ideas win. Where people flourish and grow. Where the excitement of their work lives would be transferred to their whole lives." (Tichy and Cohen, 1997 p. 178)

Even in mundane business activities such as strategic planning, Shaw et al. find a story-based approach inspirational. The vivid pictures elicited through narrative engender understanding and buy-in. (Shaw et al., 1998a p. 47) As they recount in their discussion of strategic planning at 3M, narrative based strategic plans have elicited an enthusiastic response throughout the company. If storytelling is an effective tool for strategic planning, it is perhaps even more useful in leading major change initiatives. Indeed, Jones, et al. (2004) argue that one of the most important elements to successful change efforts is that top managers articulate a need for change and then show a clear path to an end state, painting a lucid picture of a better future.

When leading change, according to Denning, you cannot wait for people to internalize and understand your logic, as that process is often too slow. You have to paint them a picture. (Sadowsky, 2001a) He was able to transform knowledge management at the World Bank by painting pictures of what knowledge sharing would "feel" like in the future. (Denning, 2001a) In Tichy's description of the transformation of General Electric, we see another situation where storytelling played a key role, and where the leader could not wait for the followers to understand all the logic and rationale behind the change. Welch, like Denning, had to create a picture of the future in the minds of the listeners. As Tichy relates, "Almost from the day he started as CEO, Welch began telling his story in actions as well as words. It would have been nice to wait for people to understand, but Welch knew he could not. Part of making people understand his story and helping them change would be to let them experience what it would be like to live in the new GE." (Tichy and Cohen, 1997 pp. 178-9)

People will replay your story, make it their own, and even use it to lead

Story is powerful because of its dynamic nature: through story, teller and listener are on a journey together. As Metzger describes this phenomenon, "we enter a story and become both a participant and a co-creator." (Metzger, 2000) Since stories are often co-creations,

and since stories deal in emotion, a good story can grow and develop in the minds of the listeners, mobilizing them and making them part of a larger mission. (Simmons, 2001 p. 35) Denning concurs, saying that one of his great discoveries was that the true power of a good story lies in its capacity to trigger new stories in the mind of the listeners. In his knowledge management endeavours at the World Bank, the stories of the group become co-creations, and thus a true force for change.

Stories engage members of an organisation by letting them see a clear image of the future that has meaning for them. (Kouzes and Posner, 1999 p. 25) As opposed to rational analysis, which may change people's thinking, stories can truly motivate people to *move.* Simmons is particularly eloquent on this point, proclaiming that "if you can help people understand what is going on, understand the plot (a plot, any plot) *and their role in it* (emphasis mine), they will follow you. Once they believe in your story they may even start to lead the way." She adds: "If it is a good story, you don't have to keep it alive by yourself. It is automatically retold or replayed in the minds of your listeners." (Simmons, 2001 pp. 35, 34) For Pearce, it is through telling "relevant stories"—those that followers can truly buy into and take ownership of—that leaders move and change organisations. (Pearce, 1995 p. 106)

Ridderstråle and Nordström (2000) encourage company leaders—whom they call the CSOs (Chief Storytelling Officers!)—to give meaning to the organisation by telling base stories, and then letting these stories do their work throughout the ranks. (Ridderstrale and Nordstrom, 2000, p. 190) If the CSO does a good job of inspiring with the base stories, others will spread them; in the best cases, there is even a "multiplier effect", as personalized versions of the base stories cascade down through the organisation. As examples, the authors cite ABB and IKEA, companies where organisational stories have great impact because they are carried through the ranks by individuals at all levels.

3.4.2 Research and opinion support the notion that stories are more believable

Reason and Hawkins (1988b p. 79) have termed story "the shortest distance between a human being and truth", because we trust them more than other types of discourse or

information. Indeed, there is considerable literature that describes story as more "true" and believable than fact, logic or rational analysis. Simmons, for example, says that stories are "more true" than facts because stories are multidimensional. (Simmons, 2001 p. 33) If story is more true and believable for us, it is due to a concept we have articulated throughout chapter 3.3: the simple fact that our lives are stories. As Beers explains, "While we're a culture that wants facts, we like those facts put into a narrative format...We make sense of our lives through story and often confront our dreams, our hopes, and most profound fears through the stories we tell." (Beers, 2002 p. 4)

While policy statements and discussions of values can indeed be empty and meaningless, story gives them life. Wilkins contends that "informally told stories suggest to those who hear them that a particular philosophy is truly followed. They also give a concrete example of what would otherwise be a very general and perhaps meaningless statement." (Wilkins, 1984 p. 42)

Since we are more open to stories, we tend to embrace them without scepticism, where we would tend to question other types of information. (Kouzes and Posner, 1993 p. 24) In illustrating this notion, Denning uses the example of speaking to employees about a value such as "honesty". We believe a story that portrays values-based behaviour—for instance, an engaging tale about how honesty works to one's advantage in a corporate context—much more easily than an abstract discussion about the importance of honesty. (Sadowsky, 2001a)

For Pottruck and Pearce, "stories are the living proof of the culture"; they form the guidelines for employee behaviour and the key to understanding what people truly believe. (Pottruck and Pearce, 2000a p. 42) Thus, stories—not work rules and policies—provide the "strong signals of the way things should be done around here...Within all strong cultures the keen observer will find dozens of stories that clearly spell out the expectations the company has for its employees." (Childress and Senn, 1999 p. 72) Wilkins advises new hires in an organisation to know the stories, not the rules, for the stories reflect what any group truly believes. (Wilkins, 1984 p. 44)

As someone who has done groundbreaking research about the role of stories in corporations (1978, 1983, 1984, Wilkins and Martin, 1979, Wilkins and Ouchi, 1983), Wilkins has reached the conclusion that an important difference exists between the

excellent companies he has studied and less successful ones, and it concerns organisational storytelling. In the outstanding companies, he found "a clear set of concrete examples of past managerial actions (passed on informally from employee to employee as stories) which make the philosophy statements concrete." (Wilkins, 1984 p. 42) The extraordinary companies were rich in stories of identity, and their stories—far more than their manuals, rules, or statements of policy—delineated shared beliefs. At Hewlett-Packard, for example, he found that stories "define, in a way mere statements can't, what the 'HP way' is." (Wilkins, 1983 p. 82)

The research of Wilkins (1983), as well as that of Martin et al. (1979), support the concept that case examples or stories are more believable than information presented in the form of statistics or abstract argument. Experiments by Martin and Powers (1979) went beyond demonstrating that stories are more believable than other forms of discourse or information delivery. In addition, the authors found that when information was presented in story form it generated a more favourable distortion in memory than did claims supported by statistics. In other words, not only did subjects in the experiments believe the information when presented in story form, they also tended to distort it later into something more favourable than it truly was.

Organisational sociologist Joanne Martin (1982, Martin et al., 1983, Martin et al., 1979, Martin & Powers, 1979, 1980), has demonstrated—using both qualitative and quantitative methods—that stories are our most believable form of discourse. In particular, two extensive 1983 studies by Martin and Powers at the Stanford Graduate School of Business are particularly revealing. In the first study (Martin and Powers, 1983a), the researchers compared the persuasiveness of four different methods to convince MBA students that a particular company really practiced a policy of avoiding layoffs. With the first group, they simply told a story. With the second, they presented statistical data that showed that the company had significantly less involuntary turnover than its competitors. With the third group, they used a combination of statistics and the story; with the fourth, they employed a straightforward policy statement made by a senior company executive. Those presented with the story alone believed the company's claim about the layoff policy more than any of the other three groups.

In the second study, Martin and Powers (1983b), presented the results and future prospects for the Beaumont Winery in Napa Valley. Information about the company was

presented to three groups as follows: One group read an impressive report about the winery, its results and goals; a second group got the story of the winery and its commitment to quality in the words of Joseph Beaumont; a third group received both the report and the story. The results of the study were similar to those described above. The story had a stronger impact, and was seen as more believable, than either the report by itself or the combination of report and story. (Martin and Powers, 1983b p. 101) Rather startling to the students as well was a phenomenon that the researchers have come to recognize: story alone is often more credible and persuasive than a combination of story and statistical evidence.

3.4.3 Stories are non-threatening, non-hierarchical, and therefore inclusive

Story has a gentle power—it draws us in and relaxes us. Finlay (1995) terms stories "non-threatening", and claims that they aid in learning "because they relax us." At Armstrong Furniture, this non-threatening aspect of story is an important element of the corporate ethos, since they use storytelling to teach company policies to new employees. (Armstrong, 1992 p. 8) Similarly, Simmons sees storytelling as the least invasive way to communicate. (Simmons, 2001 p. 126)

Stories are different than other forms of communication because people don't resist them. Whereas many forms of communication tend to put people on the defensive, stories are "friendly and enjoyable" (Armstrong, 1992 p. 6) Rather than push a story away, we have a natural tendency to embrace it. (Simmons, 2001 p. 28) Several authors express similar viewpoints about people's acceptance of stories when they are put off by other forms of discourse. For example, Denning says that stories "bypass normal defence mechanisms and engage our feelings." (Denning, 2001a p. xv) Simmons (2001 p. 127) contends that human beings tend to let stories in because they touch us in subliminal ways. Armstrong (1992) favours story because people don't like the unfriendliness of reports or memos (p. 11), because they don't like to be lectured (p. 8), and because they withdraw when we order them about (p. 6)

Stories cross hierarchical boundaries. In discussing the many advantages of storytelling

in corporate communication, Denning points out that "stories are inherently non-adversarial and non-hierarchical." (Denning, 2001a p. xv) Hansen and Kahnweiler agree, stating that a good story will be embraced by everyone in a company, regardless of formal position. (Hansen and Kahnweiler, 1993 p. 1393) With story, teaching and convincing others can happen in any direction and at any hierarchical level. Anyone can use storytelling to make a point, since storytelling is acceptable everywhere. As Simmons asserts, "you do not need a position of formal leadership when you know the power of story." (Simmons, 2001 p. 29)

When they listen to stories, people think for themselves. Since stories are not hierarchical, they encourage listeners to do their own thinking. (Simmons, 2001 p. 3) When the listeners arrive at their own conclusions, rather than those imposed by their hierarchical superiors, they truly buy in to corporate initiatives. Denning speaks of the power of this dynamic, which he experienced as the leader of knowledge management at the World Bank. As people began to take ownership of the storytelling process, buy-in and enthusiasm for knowledge management grew. Listeners then become active participants, shaping their own individualized stories. (Denning, 2001b)

Finlay and Hogan agree with Denning that the concept of leaving space for the listeners to create their own stories is a crucial one. In their eyes, storytelling kindles an ongoing thought process that keeps listeners actively involved and creating new stories. (Finlay and Hogan, 1995) Since individuals arrive at their own conclusions, they take ownership of the stories; their self-respect increases, and they thus feel more connected to group initiatives. As Simmons (Simmons, 2001 p. 119) states, "a story is more respectful than telling someone what he or she ought to think." Parkin employs the same principle in her coaching activities, often telling stories to clients, rather than giving instructions. She sees such storytelling as a powerful tool, since it is "non-invasive", allowing clients to think for themselves and draw their own conclusions. (Parkin, 2001 p. 31)

Carlos Ghosn: "A good leader brings results. A great leader writes a new story." (Benjamin, 2005)

4. AN EXPLANATION OF THE COACHING SYSTEM

This chapter describes my method of coaching a leader to become an inspirational communicator, a process of learning to express oneself through authentic autobiographical stories.

In the type of leadership coaching I do, each relationship is truly unique. Therefore, as I describe an unfolding "process", it would be a mistake to see it as a regimented procedure. In fact, one of the most fascinating aspects of leadership coaching is that it happens differently with each individual. The steps presented here should be considered as the general themes and concepts, rather than a "cookbook" to be followed in strict order.

In fact, I think of the interaction between client and coach as circular rather than linear. Though we move unfalteringly toward our objective, the process often circles back on itself. In leadership communication, one practices the same concepts over and over, with the goal of achieving mastery. Learning to communicate as a leader takes dedication and attention to detail. For this reason, I should explain (and perhaps apologize for!) the repetitive nature of this text. At times, this chapter reiterates core concepts for emphasis, but it also repeats themes because of the cyclical nature of the process it describes.

My coaching relationships have always begun by word of mouth. Someone who knows me—a client, a fellow board member in a company, an investor, a common acquaintance, or a person who has heard me speak at a conference—suggests that I serve as coach to the leader. Often, the leader himself or those around him have identified a need for him to communicate more clearly and effectively, in order to inspire one or several of his constituencies: employees, shareholders, potential or existing clients.

While I will use examples from various clients throughout this text, we will follow most closely the story of Tim Bilodeau of Medicines for Humanity. Sections in italics throughout the text recount Tim's progress at the various stages of the coaching journey. These examples do not follow Tim chronologically. Rather, they are used at the appropriate moment in the text, to demonstrate or clarify a particular aspect of the coaching process.

4.1 INITIAL CONTACT—REDEFINING LEADERSHIP

I always begin by listening to the client to determine his needs and objectives, and to see if I can indeed be helpful. At this introductory meeting, I seek to understand the individual, but also to explain how I work, and to make sure that the client's expectations are accurate and realistic. I talk in broad terms of my convictions, what I have learned from studying leaders, from coaching leaders and helping them communicate more effectively. It is crucial at this stage that the leader understand what I plan to focus on, what we will do and not do. Specifically, I stress the concept that our work is about leadership through inspirational communication, about speaking from the heart to motivate others. It is not about tricks and methods to make the speaker appear more "charismatic". Rather, we work on teaching the leader to inspire by speaking in her natural voice. In particular, I highlight that, in contrast to many communication or leadership coaches, I work on finding authentic and inspirational stories from the leader's experience, rather than on speaking techniques.

4.1.1 Charisma is not a prerequisite

In fact, my view of charisma is that our society has come to believe, wrongly, that it is among the necessary components of effective leadership. My business experience, as well as in my coaching and teaching, has convinced me that winning leaders have conviction and resolve, they have clear ideals and values that they stand for, they have a desire to express themselves, and they have stories to tell. While charismatic individuals can indeed be magnificent speakers and effective leaders, it is important to understand that none of the

characteristics enumerated above require charisma.

I offer examples to show that charisma should never be considered a requisite attribute of leaders. For instance, in his personal study of two former Israeli prime ministers—Shimon Perez and Yitzhak Rabin—Boas Shamir concluded that they were in many ways polar opposites. Perez was the classic, textbook transformational leader, with a clear vision and engaging charismatic appeal. On the other hand, Rabin was shy and lacking in anything resembling charismatic or visionary characteristics. Since both were remarkably effective, he concludes that charisma is not a requirement for leaders. If each led in his own style, their motivational discourse was replete with autobiographical stories. (2002b)

Rather than charisma, I have found that the *sine qua non* of leadership is inspirational storytelling. Indeed, Cohen and Prusak claim that "storytelling is an essential skill" for the leader (Cohen and Prusak, 2001 p. 131), while Kouzes and Posner see the ability to tell a good tale as a necessity: "Credible leaders must master the art of storytelling." (Kouzes and Posner, 1993 p. 197) Fleming proclaims that "few tools are as powerful and readily available to the leader as the use of personal and organisational narrative." (Fleming, 2001 p. 35) For Elizabeth Weil, "in a new world of business...storytelling is the ultimate leadership tool." (Weil, 1998 p. 38)

Former CNN reporter Mark Walton recounts his views on charisma and persuasion: "When I left CNN to begin working with corporate and government leaders, I was struck by what so many had been led to believe was the key to generating buy-in...Executives wanted to know if, after fifteen years of on-camera network television experience, I could train them to *appear more charismatic.*" Walton goes on to explain that he strives to leave his clients with something far more powerful than the appearance of being charismatic—a methodology for telling strategic stories that influence others. (Walton, 2004 p.55)

Bennis is particularly adamant that personal charisma is not a required ingredient of leadership. (Bennis and Nanus, 1985 p. 175) In fact, he and his co-author concluded that society's view of the larger-than-life, charismatic leader is largely a myth. The most effective leaders they studied "were short and tall, articulate and inarticulate, dressed for success and dressed for failure, and there was virtually nothing in terms of physical appearance, personality or style that set them apart from their followers. Our guess is that it operates in the other direction; that is charisma is the result of effective leadership, not

the other way around..." (Bennis and Nanus, 1985 pp. 207-8)

Other authors even consider charisma disadvantageous to leaders. For example, Collins laments the emergence of the charismatic CEO, which he considers harmful to the enduring success of companies: "The recent spate of boards enamoured with charismatic CEOs, especially the rock star, celebrity types is one of the most damaging trends for the long-term health of companies." (Collins, 2001b p. 216) Similarly, the researchers who wrote *Living Leadership* declare that their study of leaders has rendered them "suspicious" of charisma. In a passage they call "character not charisma", the authors elucidate one of their most fundamental conclusions: "Character was an essential ingredient of leadership; when we saw people being effective leaders, they were not necessarily colourful or outgoing but they were people of substance." (Binney et al., 2005 pp. 17-8)

As we will see clearly through the example of Tim Bilodeau, one can indeed become an effective leader and communicator without being colourful, outgoing, or a naturally compelling speaker. Certainly, neither Tim nor those around him would have described him as anything resembling charismatic in 2001. Today, Tim's presentations have indeed become quite convincing, but his persuasiveness stems more from his having found a forceful message—a powerful inner voice— than from having worked on the technical aspects of speaking. Tim is a striking illustration that charisma and leadership are not necessarily linked, despite what much of the world seems to presume.

Thus, my coaching of leaders is not about helping the leader become more charismatic, or about teaching techniques or behaviours. Rather, I encourage the leader to develop his or her own style based on his or her own personality and character. Together, we look inside the individual to develop authenticity and an ability to communicate with others by expressing one's self, from the heart. In this vein, I agree with Pearce, who thinks that one should work on the speaker's inner self more than on speaking technique: "Professionals resolve to study the *exterior of a speech* when the real power is in the *interior of the speaker*." (Pearce, 1995 p. 15) In my consulting, I focus on speaking from the inside out, rather than on finding or imitating techniques that improve the exterior aspects of one's communication. As renowned storyteller and coach Doug Lipman reminds us, it is far more important to discover one's own true voice than to work on style and technique: "Style and effectiveness are independent of each other. If you find your individual way of communicating, your style will find you." (Lipman, 1999 p. 16) Simmons expresses a

comparable viewpoint when she advises speakers: "Don't try to work on your tone—work on your feelings and your tone will follow." (Simmons, 2001 p. 103)

4.1.2 Rather than charisma...authenticity

The coaching process I believe in has at its core the firm conviction—rooted in my experience, study and observation of the past ten years—that authenticity is far more central to leadership success than are style or charisma.

Inspiration, motivation, communication, leadership—it all begins and ends with authenticity. This observation, based on knowledge gleaned from my years of teaching and coaching leaders, is echoed by former Medtronic CEO Bill George. One of the chapters of his book on leadership carries the title "Leadership Is Authenticity, Not Style." George makes the point that modern business culture, as well as the literature, has overemphasized models for leadership—the traits and behaviours to emulate, rather than a search for one's inner self, for becoming "the person you were created to be". In his view, leadership is more about finding one's own authentic persona and true nature: "Contrary to what much of the literature says, your type of leadership style is not what matters. Great world leaders—George Washington, Abraham Lincoln, Winston Churchill, Franklin Roosevelt, Margaret Thatcher, Martin Luther King, Mother Theresa, John F. Kennedy—all had very different styles. Yet each of them was an entirely authentic human being." (George and Bennis, 2003 p. 13)

If authenticity is the soul of leadership, it is also at the heart of successful communication. As Weissman states, "*getting your story right* is the critical factor in making your presentation powerful; far more so than your delivery skills. In fact, I've found that, when the story is right, the delivery itself tends to fall into place, almost magically so. The reverse is never true. You may be the most polished speaker on earth, but if your story isn't clear and focused, your message will fail." (Weissman, 2003 p. xxxv)

While my discourse and examples often emphasize that leaders express themselves through their stories from the heart, I do not always use the term "storytelling" extensively at this first get-together, since this term is often misunderstood or misinterpreted. At this early stage of discussion, I do not want my interlocutor to confuse my specific definition of

the term—telling true, authentic and emblematic anecdotes—with another possible connotation: the fabrication of fictitious or deceptive tales. Thus, I may discuss my definition of storytelling, or save that discussion for a future conversation.

If I choose not to delve into the concept of storytelling at the initial meeting, I talk of speaking powerfully from a platform of self-knowledge, understanding what one stands for, what one's profound beliefs and core values are, and where these values and beliefs come from. I articulate my firm belief that leadership begins with deep self-exploration, that this introspection requires a significant commitment, that some people are not comfortable with this process or able to allocate the necessary time and effort. Thus, I attempt to gauge the individual's depth of interest and willingness to work through the process. At the conclusion of this meeting, assuming that it has gone well and that both sides seem eager to proceed, I propose that I prepare a summary of our conversation, along with a discussion of our objectives and the next steps.

Initial contact with Tim Bilodeau

My early discussions with Tim were somewhat atypical in two aspects: First, it would be the only experience of my career where I would coach someone whom I already knew quite well. Tim and I had become friends as MBA classmates in the early 1980s, and he had asked me to serve as a board member when he founded MFH. It was in the context of a trip we made together to organise an MFH site in Oruro, Bolivia in August 2001 that I had my first opportunity to see Tim in action, as he presented our organisation and talked of his own background, during our search for potential MFH partners. While I saw the underlying narrative as remarkable and quite moving, his presentations of the organisation and its goals were neither dynamic nor authentic. Thus, I began to talk to him in general terms about how he could engage his listeners by telling his story more effectively. One evening, I asked him practice his speech "live" with me, an exercise that we subsequently performed several times during our stay in Bolivia, always informally and without slides. Despite my emphasis on making his discourse story-based, Tim's presentations to me remained largely a string of facts, filled with discussions of need, replete with numbers and statistics about children dying needlessly, comparisons to holocausts and other human disasters. I concluded that Tim had a fabulous story to tell, and a lot of information to support his arguments, but his delivery was lacklustre and

monotonous.

During the trip to Bolivia, I gave him several ideas for improving his presentation, and I described to him in general terms the leadership and communication consulting I was doing. Near the end of our trip, he asked if I would be willing to coach him on a regular basis. As I had great admiration for Tim and his work, it was easy to agree in principle, though I could not begin immediately because of numerous other coaching engagements. In addition, I asked him to reflect on his own commitment to the coaching process, as I felt that doing this type of pro bono work with a friend and colleague presented some potential dangers. Specifically, I wanted to start with Tim as I would begin with any corporate client, and to ask him for the same commitment I ask of anyone I agree to coach. So, I sent him the document described in section 2 below, explaining the beginning of the coaching relationship, and I asked him if he felt ready to embark on this type of journey.

The second aspect that would make working with Tim different for me concerned the applying of my "corporate" coaching methods to a non-profit situation. The not-for-profit environment would present a new and different challenge, as Tim had direct hierarchical authority over almost no one. (In 2001, Tim's fledgling organisation was a true "one man show" with only a few volunteers and nobody working with him on a permanent basis. By the end of 2005, despite the impressive growth and the opening of 13 sites worldwide, MFH still had only three full-time employees.) Thus, the question of how to motivate an organisation of volunteers would be novel for me.

4.2 STRUCTURING THE COACHING RELATIONSHIP

With every client, I begin with a written document that outlines the goals of our work together and stresses the importance of commitment to the coaching relationship.

The offset passage below is an example of the type of information I send, with the following two aims. First, I want the purpose of our endeavours to be clear, in black and white, so that the trainee has unequivocal and reasonable expectations. I am always careful to be straightforward in emphasizing that our work together is more about self-knowledge and authenticity in communication than the techniques of speaking. Numerous

communication consultants are more qualified than I to tell someone how to craft a polished speech, or how to hold one's hands while delivering such a speech. My teaching is about learning to speak from the heart, to tell authentic stories and reach an audience by connecting on an emotional level—as one human being to others. Second, the process only works if the individual accepts the notion that learning to communicate authentically is hard work. When we begin the coaching process, I want to very direct about the significant commitment of time and energy we will need to make.

Illustration 1: *THE COACHING AGREEMENT*

> What I am proposing is an individualized coaching process that will transform the way you think about yourself and the way you communicate with others. Together, we will improve your leadership and communication skills.
>
> The importance of our mutual commitment: We are engaging in a coaching process that will demand a significant commitment of time and energy. My past experience with this sort of work has demonstrated that the success of the coaching process depends greatly, perhaps more than anything else, on the vigour and dedication you bring to it.
>
> Though improved communication is a stated goal—and always an outcome—of this process, I must emphasize that the prime focus of this coaching in <u>not</u> to make you a more witty or pleasing speaker. The difference between someone who has mastered the craft of an engaging speaker and a transformational leader is often the difference between a crafted speech and authentic communication. If you want to have a transformational impact on others, you must go beyond entertainment and oratory techniques. So, our central mission will be about leadership and authentic speaking, as opposed to making entertaining or well-designed speeches.
>
> You will learn:
>
> to attain a deeper understanding of who you are, why you are here, what you stand for, what is important to you, and the influences that have shaped who you are today.
>
> - to use this self knowledge to communicate with authenticity
> - to speak clearly, directly, and simply
> - to use the power of your personal stories to reach any audience
> - to use the "teachable moments" of daily life and the lessons from your past to inspire others

- to understand and express your vision for now and for the future
- to tell a genuine "story of greater purpose" that aligns your groups and teams

Among the results will be:

- increased self confidence in communicating with individuals and groups
- increased ability to connect with others in a wide variety of contexts
- increased ability to inspire trust in those around you
- increased ability to align and motivate groups and teams
- my suggestions and exercises to continuously renew your own enthusiasm, energy, and commitment to inspiring others—for the rest of your career
- a better understanding of how you communicate, and of the effect you have on others

---

Tim's commitment

After studying my document, asking his questions, and getting over some initial reservations, Tim decided that he felt ready to buy in to this course of action. As I sensed in him a true willingness to proceed on the journey of introspection and self-knowledge, I was confident that a coaching relationship made sense, and that we could effect dramatic improvement in his ability to communicate as a leader. Now, it was time to discuss in greater depth my view about storytelling and the essential role it plays in my leadership coaching endeavours.

4.3 FIRST ATTEMPTS AT PRESENTING

With every client, I schedule a face-to-face encounter, in order to formalize our commitment and provide additional structure. At this get-together, I lay out some of my views on leaders, communication and storytelling, and I try to gauge the receptiveness of

my audience. For me, this session is also a final "test": at this juncture, I might decide not to continue if I sense a lack of understanding, or a lack of commitment.

Often, I request that the person prepare a short presentation for me, to talk about their business, their sales pitches, their products, their organisations, etc. My goal is to learn something about the individual, but also to see how comfortable they are with dialogue and story. Usually, the people I talk to are conditioned by the milieu of business, where presenting something to someone means giving in-depth, logical and factual explanations. So, people tend to want to reach for lists, charts, graphs, slides, PowerPoint presentations—the tools we all use to "dump data" on each other. Almost invariably, these first accounts are wrought with detail, too long, and without passion. Thus, without being overly critical of the presenter, I can often use this initial demonstration to stress several key points that will become recurring *leitmotifs* of my work with everyone I coach. First, we all tend to lose our connection with any audience by making presentations that are too long, dry, detailed and complex: So, simplify! Second, we can engage almost any audience quickly with an appropriate autobiographical tale: Personalize the presentation! Third, our stories—the most powerful way humans have always made emotional connections with other humans—often get lost in the maze of tools and techniques. While slides, graphs, and charts can be effective when use appropriately, I emphasize from the outset my third cardinal rule: Story first, tools later!

As explained above, slides should be entry points for stories and examples, not vehicles for dumping statistics and logical arguments on the listeners. The problem with most presentations today is that the slide becomes the centre of attention. One of my most critical coaching goals is to get the presenter and his stories at the centre of the show.

Tim's first formal presentation

In Tim's case, I had already seen him present MFH in informal settings in as we travelled in Bolivia. When I asked him in December 2001 to present MFH to me, not as we had done in Bolivia, but as if facing a more formal corporate audience, his presentation was typical of many I see. It was a series of PowerPoint slides, a data dump—long on information and short on inspiration—the type of discourse that fails to hold audience interest. The slides were repositories of information, rather than entry points for his stories. In addition, Tim's general demeanour was quite withdrawn and hesitant; he made

little eye contact with the listener. He spoke with a focus on his notes, overly concerned with following a predefined structure, and careful not to leave out any of the detail in his planned speech.

Furthermore, Tim was completely self-conscious and ill at ease, even self-effacing. As leadership consultant Philippe Gaulier might put it, he was making himself small with his delivery, merely occupying the space around his shoes! (Rubin, 2000 p. 228)

After Tim's presentation, I found myself in somewhat familiar territory. Often, in my feedback to clients after this initial presentation, I suggest they make a basic shift in focus—away from their facts and data, and toward their connection with the audience. Human beings, in any situation, tend to "buy" other human beings, not rational arguments. It is connection with an audience that makes a speaker credible; without this connection, facts and data will never convince. In order to make our connection, we need to get some personal element about the speaker—an anecdote that shows some element of his passion, or a story about one of his core beliefs—at centre stage. Connection and credibility only happen when the audience "feels" who the speaker is.

While making a personal connection with listeners happens in various ways, I stress the concept that effective speakers touch others by revealing something of themselves. Thus, two of my favourite questions for early encounters with those I coach are: (1) "What do you stand for; how would you define your central principles?", and (2) "What are you passionate about, in your business life?" These queries are offered up to the person in a non-threatening manner, and it is one of the ways by which I gauge the subject's sense of self and ability to articulate core beliefs. With these questions, I am also looking for the type of personal autobiographical material that will help us create a link with any audience.

4.4 BEGINNING THE JOURNEY TO SELF-KNOWLEDGE

I am often surprised by an accomplished manager's inability to provide a swift and convincing response to queries such as those cited above. In fact, I have found that many individuals in mid-career—with impressive resumes and significant leadership experience—have difficulty giving concise and meaningful answers to questions about

what truly drives them, about what they find important or motivating in their work. Most often, the answers I hear lack passion and energy. So, I use a discussion of these questions to highlight my viewpoint on profound self-knowledge—that leaders must have clear ideas about who they are, what they stand for, and the mark they want to make on their organisations and on the world.

From this early stage, I emphasize that one cannot lead without clearly standing for something, or without the ability to articulate an unambiguous worldview, an authentic point of view that emanates from deep inside, and that is, at its core, unalterable. Successful leaders have lucid ideas about who they are, why they are here, and what they believe—and they express these ideas regularly, straightforwardly, and consistently. As Mike Krzyzewski, coach of Duke University basketball and one of the most respected authorities on coaching in the United States, advises us: "A leader has to know who he is and what he stands for. And he also has to say it, to demonstrate it, and mean it if he even hopes for people to follow him." (Krzyzewski and Phillips, 2000p. 225) Or, as Pearce states quite simply: "To move others, you must first know the source of your own strongest convictions." (Pearce, 1995 p. 24)

Therefore, we begin with the inner journey for a straightforward reason: self-knowledge and self-awareness are central components of effective leadership. As Kouzes and Posner (2006 p. 64) state clearly: "Self-awareness is a predictor for success in leadership." Bennis (1994 p. 90) asserts that self-exploration is one of the keys to realizing one's leadership potential. In his words: "Becoming a leader begins with an exploration of the inner territory as we search to find our own authentic voice. Leaders must decide on what matters in life, before they can live a life that matters." Consequently, at this early stage, I begin to elucidate at some length the critical role of introspection. In the sessions to come, we will focus intently on uncovering the leader's deepest convictions, on defining his point of view on issues important to him, and on expressing these points of view in a true and authentic voice. A desire and a commitment to make the deep journey inward are paramount, since, as Bennis advises us repeatedly, a leader's perspective must emanate from one's inner nature; it cannot be borrowed or grafted from another human being. (Bennis, 1994 p. 122)

4.4.1 The importance of storytelling

Our deep inward journey will also help us find the stories of self, the emblematic stories of identity that constitute one of the leader's most powerful forms of expression and influence. When we work on leadership communication, our stories must not be fabrications, deceptions or political demagoguery; they must be authentic reflections of who we are, what we stand for, and our image of the future. For example, when Michael Dell talks about discovering the power of direct selling, he tells stories from his childhood to teach others about disintermediation. The stories from his early years illustrate his point of view, and we see the characteristics that shaped his business success as an adult. (Dell and Fredman, 1999 pp. 3-6) His stories are far more effective than theoretical explanations at getting points across to Dell's employees, customers and investors.

Thus, if I have not had an in-depth discussion of storytelling with the person previously, I outline my views on persuasion and storytelling at this point. My belief in the importance of learning to tell a story stems from two firm convictions: (1) effective communication that calls people to action must engage their emotions by portraying an inspirational story of the future, and (2) modern thinking and discourse over-emphasize technology, scientific data, and rational argument. I stress that I am a firm believer in technology and science, even an early adopter of numerous innovations. However, if there is one tendency I have observed more than any other in the modern business presentation, it is the overuse of technology and the under-use of human emotion and story. While I can speak from my own experience sitting through hundreds of dry, cerebral, emotionless presentations every year by corporate executives and MBA students, I also cite numerous authors and communication experts who favour story over rational argument.

4.4.2 First discussions of storytelling with Tim

When I first introduced the systematic use of storytelling with Tim in December 2001, I sensed that he was more intrigued than convinced—intrigued by the concept that the most effective business presentations are story-based, and by my strong conviction about this point. While not completely persuaded, he said that he was willing to "give it a try". In fact, in one of our early discussions of storytelling, he confessed to me that he had never

felt completely comfortable advocating the MFH "case" in front of a group. His slide-based discussions demonstrated the need, the organisation's reason for being, and even its effectiveness—but not its passion. I responded that he should want his listeners to discover what he was about, to feel Medicines for Humanity's soul and spirit, and that he could not accomplish this with logic and statistics alone. Thus, Tim was ready to experiment with storytelling; perhaps telling stories would be a way to let his enthusiasm and commitment shine through. Based on my prior experience, I was confident and hopeful!

4.5 FINDING THE LEADER'S STORIES

As people often need precise direction to embark on their practice of self-exploration, I send out the "Starting the leader's storytelling process" document (see below) with instructions on beginning the journeyline exercise. Again, and often in person, I emphasize the first major task of our process: to truly "know thyself", to live what the Greeks referred to as "the examined life". Marinoff (1999) contends that, for the great Greek philosophers, self-knowledge was the true purpose of all human existence, and the base from which social influence becomes possible (Marinoff, 1999 p. 11) As Pearce states, "it is your ability to tap into your own human spirit that will inspire others to act." (Pearce, 1995 p. 24)

At this juncture, I have usually convinced the participant, at least in theory, that storytelling is a powerful tool for influencing and leading others. I have also tried to make a connection between leadership storytelling, teaching, and the ability to learn life lessons, the lessons from one's own past. Indeed, the stories we will seek to tap into are personal stories from the leader's life experience, stories that express what he or she truly stands for in life and in business. If successful leaders tell certain kinds of stories—stories of identity, values, and their vision of the world—they invariably do so from a platform of deep self knowledge.

In winning leaders, self-exploration appears to be a constant, ongoing, lifelong progression. Outstanding leaders use their own life experience as the base from which to influence others. (Pearce, 1995 p. 24, Kotter, 1996 pp. 175-6, Bennis, 1994 p. 3) In

addition, Kramer concludes that reflection and sense of self often separate the successful leader from the fallen. (Kramer, 2003 p. 66) In other words, there is a relationship between leadership failures and the leader's lack of introspection about his values and true nature.

4.5.1 Writing the journeyline

At this point, I talk about how I came to believe so deeply in the concepts of personal reflection and story-based presenting, citing examples from my coaching experience. Then, I send instructions for beginning the process of self-examination, an excerpt from which I present below.[4]

Illustration 2: *YOUR JOURNEY: THE "WHO I AM" EXERCISE*

> I like to begin with an emotional journey line, a plot of your entire existence. What have been the high and low points in your life? Go all the way back to childhood—the earliest memories you have—and work to the present. On your journey line, mark the points where you had a lot of energy. What events and people were giving you that energy? When were the low points in your life? What was missing? What lessons did you learn in the bad times?
>
> This exercise may seem a bit tedious or time-consuming. I emphasize its importance, though, as both my consulting experience and my research have convinced me that truly influential leaders always have a particularly high level of self-awareness. In ancient Greece, above the Oracle of Delphi, the wisest of the wise, two words were inscribed: "Know Thyself". This is one of the simplest, and most difficult, tasks for all of us. The more you work on knowing yourself and knowing what is important to you, the more powerful your story will be, and the more it will resonate with those you seek to influence. That is why I ask you to begin your journey with an introspective exercise.
>
> In order to inspire, to move others, you must first know the source of your own strongest convictions.

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[4] The full text of a typical "instructions" document can be found in the Appendix.

> After you have plotted your journey line, think about the people, events and decisions that have framed you and your view of the world. Write down each of them. Reflect on each key moment, event, decision, or person. Think about what each one taught you, and how those lessons and understandings shape your worldview today.
>
> Some of the important events may have happened a long time ago. For example, one person doing this exercise wrote: "I learned the importance of generosity and open-mindedness from my father, a doctor. At a very young age, I would occasionally accompany him on a house call in the impoverished suburbs of Santiago, where I observed his interaction with all types of people...These values—being open-minded, non-judgmental, and treating everybody the same and with respect—have influenced my life ever since."

At this stage, as the client makes the initial attempts at writing a journeyline, my most important task is to help him uncover watershed moments, the key turning points of life, the type of experiences the Bennis refers to as "crucibles". Here, I emphasize repeatedly that these watershed events are not necessarily remarkable. One of society's great myths about leaders is that they have extraordinary experiences in their past that mould them for leadership roles. My own consulting work and research have convinced me that this "extraordinary past" theory is sometimes true, but most often not. For Tichy, as well as for Bennis, it is not the specific events of one's life that create a leader, but rather the individual's ability to process these events. In *The Cycle of Leadership*, Tichy makes the case that exceptional leaders continuously analyse their own experiences, and that they engage in "virtuous teaching cycles" where they learn constantly from their own life events, and from those of others. What forges a winning leader is not any particular type of experience *per se*, but an ability to reflect, to construct a teachable point of view based on one's own life experience. (Rothenberg, 2003) While Bennis sees "crucible" events as often significant to a leader's development, he explains that the crucible need not be traumatic. More important than the incident itself is what lies on the other side of the crucible—the ability to learn from the experience and to integrate the lessons into one's worldview. (Bennis and Thomas, 2002b, Bennis and Thomas, 2002a)

4.5.2 Composing Tim's journeyline

I did indeed send a document much like the one in the Appendix to Tim, in February 2002. His initial reaction was favourable; he said that the theoretical concepts made good sense to him. I could see that he remained intrigued, if not entirely convinced, by my perspective

on self-exploration and self-expression. He also appeared willing to test the power and appeal of story-based presentations. In his typical fashion, Tim began working quietly and meticulously, sketched his first journeyline on paper several days later, and was eager to discuss it with me.

Relative to others I have coached, Tim's early efforts displayed an extraordinarily high level of introspection and self-knowledge. Our several face-to-face meetings in late February, to discuss his life journey together, uncovered several themes and core beliefs central to Tim's identity: a continuous searching for meaning, a desire to fight injustice, a yearning to be involved in life and death issues, a need to "do something special". As I prodded him to talk about where these qualities come from, he quite naturally began telling the stories of events and decisions that I would come to see as the watershed moments of his adult life. The untimely death of his best friend, a stand against injustice that landed Tim in a Greek jail, his reflection on the Last Judgment, and an "epiphany" moment on a beach in Massachusetts were crucible events, turning points that caused him to question who he was and what was truly important to him. As Tim recounted these events, as his stories began to flow, I could see clearly how his reflection on these experiences, his ability to process and learn from them, had changed his sense of purpose in fundamental ways that would stay with him forever.

From his viewpoint, Tim remarked that he found our dynamic interchange inspirational. The act of thinking about, and then discussing, the turning points of his life brought back sentiments he "had not thought about or felt in a long time, at least not with this much emotion and immediacy." Reactions similar to this are in fact quite common among those I have coached, and this type of feedback has increased my own credence in the exercises that retrace the leader's journey. <u>Evoking life's key turning points, and discussing them in detail, is simply one of the most powerful of leadership coaching tools</u>. As the client relives the intensity of these watershed experiences, his reflection on them often becomes an essential source of renewal and motivation—a springboard for further reflection and action.

4.6 EXPLORING THE LEADER'S STORIES

Depending on the individual, it typically takes several iterations, and sometimes quite a bit of coaching, to get the person to reflect upon his past and construct an appropriate and meaningful journeyline. In our exchanges, I push the client to provide sufficient depth, to reflect deeply about what is important, i.e. his values, and to understand the past experiences that formed these values. I remind the individual of our ultimate goal—using authentic stories of the leader's core beliefs to inspire those around him. The first step is to generate a clear picture of those core beliefs.

4.6.1 An ongoing process of self-discovery

A leader must make the journey inward—to self-discovery and self-knowledge—before she can make an effective journey outward—to influencing and inspiring others. Throughout the entire coaching undertaking, I underscore the notion that, for the most effective leaders, learning and self-discovery are an ongoing, lifelong journey. (Tichy and Cardwell, 2002) It is our life stories, our examination and understanding of our past experience, that allow us to be cogent and coherent in expressing ourselves to others. (Linde, 1993, Polkinghorne, 1988 p. 106, Crites, 1986 p. 172) In addition, my own observation and coaching of effective leaders has led me to the conclusion that they are people who *actively* recollect and reconstruct their past. Consequently, one of my roles as coach is to encourage consistency and persistence in introspection, so that the leader's stories of identity remain alive and vibrant, and continuously updated.

4.6.2 The importance of writing

At this phase, I also introduce the idea that writing is an important learning tool and an integral aspect of our learning endeavour. While it would often be easier and less time-consuming for me to help the individual with the process, to "talk through it" with him, I have found that such an exclusively oral process does not yield the same depth of thought,

and the result is far less satisfactory.

In fact, my various coaching experiences have proven the following: leaders who do not write their own journeyline, and who do not embrace writing as an important ongoing element of our process, progress far less than those who do. Bennis (1994) maintains that the act of putting words down on paper is a vital route to self-discovery. Shamir states unequivocally that the autobiography is a <u>necessary</u> act of leadership, and that writing autobiographical stories is often an important route to self-knowledge and self-creation. (Sadowsky, 2002b) Indeed, writing helps provide depth and clarity as we probe for core values. We seek to identify the "small number of ideas that constitute the core of your philosophy", since "delineating your point of view is the first step toward speaking authentically." (Pearce, 1995 p. 27-8)

Tim's progress on our initial "inner journey", during the three months from February to April 2002, was strikingly swift for several reasons. First, he had needed relatively little prodding and guidance through the journeyline exercise, an endeavour he understood almost from the outset. Thus, together, we had arrived quickly at an understanding of his guiding principles, a clear definition of what he stands for. Second, he had seen the value and power of re-examining his past and the origin of his core beliefs; he was eager to continue the process of introspection. Again, I see his quick buy-in as somewhat unusual, since most of my clients and colleagues need more convincing, several coaching sessions before their "awakening"! Third, the Tim's fast movement forward in this process was to continue due to an unanticipated effect of distance. As my travel schedule precluded face-to-face meetings in March or April 2002, Tim and I decided to use "distance coaching" as a way to maintain our momentum. Thus, writing assignments became—by necessity—a vital element of our interaction, providing the vehicle for his continued reflection in my absence, as well as the base documents for our weekly telephone discussions. Thus, there was no need to persuade Tim about the critical importance of writing, as I have been forced to do with other clients. Writing happened because there was simply no alternative!

In the ensuing years, Tim would express to me on numerous occasions that reflecting on his inner journey and beginning to write his personal stories was the turning point in his development as a leader. As he reconsidered his past, he reawakened his own passion and began to express it to others. Thus, at this early stage, Tim was already partially "converted" to the concept of storytelling, and to the value of writing. However, we would

discover that the concept and the execution are two different matters!

In the following early version of Tim's personal "tale", we see the stories about his core values emerging. At this juncture, I had merely asked Tim to do one of my favourite exercises—write a "why I do what I do" speech, explaining his motivation and the goals of his organisation, for delivery to a local community group. Rather than trying to persuade his imaginary audience with fact or rational argument, I wanted him to use only his personal stories. We had been through several iterations of Tim's writing and my commenting, when he sent me the following text on May 14, 2002.

Illustration 3: *TIM'S "WHY I DO WHAT I DO"*

There was once a young fellow who had the world by the proverbial tail. The scholar athlete at his high school, he went on to Harvard, determined to follow in his Father's footsteps by becoming a lawyer. He knew what he wanted to do... he wanted to be successful... a successful lawyer... that was how he was raised, and there was never a doubt about the path he would follow.

He was also raised in the Catholic faith, and practiced this faith "religiously"... He had very few questions about it... it was part of the formula for success, and, simply put, if he was good to God, God would reciprocate.

One fall day his senior year in college, his world was turned upside down, although he didn't completely understand all the ramifications at the time. He was coming home to dutifully prepare his law school applications, and, as he walked in the door, his Father greeted him with "I have some bad news for you... you better sit down." His Father told him that his long time best friend, Colin Gillis...had been killed in an automobile accident. This was the first death of someone close to him that he had experienced. Collie was his same age, 21, and he felt dazed and shocked by the tragedy. In the course of the next hour, his Dad said something by way of comfort that has stuck with him since... he said, "You know, Tim, the best advice I can give you in dealing with this is to make yourself a promise that every once in a while throughout your life, you'll do something special for Collie".

"Do something special"... this innocuous phrase touched off questions that would not stop their onslaught. Did he really want to be a lawyer... what was really important to him... how could he make a difference... how could he do something special? No phase of his life was left untouched. He turned to his faith for the answers... only to realize that his childish understanding of it provided little or no answers. Like a young man adrift in a life raft after the wreck of a luxury liner... he began to search for terra firma.

He put off plans for law school and instead took a "flyer" by accepting a teaching fellowship at Athens College in Greece. Another teaching fellow, Danny Danforth, was an anthropology major and opened to him a world of other cultures, other religions, and other values. He fell in love with Greece and the Greek culture, even though it was a very different lifestyle than in America. Politics were a pastime in Greece, and the freedom loving Greeks lived under the tyranny of a military dictatorship. The unfortunate part was that this dictatorship held power only because of support from the government of the US.

In the midst of his journey, this realization came to him... and began to gnaw away at him. "How could the US, which had fought since its inception for democracy and against tyranny, now support a dictatorship?" Once he realized this... he knew he had to do something about it... he could not simply observe. Going against the dictatorship in any public way meant risking your very life. Thousands of Greeks had been tortured and killed during the years of the dictatorship... but he decided to run the risk, and stage a protest against both the Dictatorship and American support for it. No Greek would survive for long if he protested in public, but an American just might if he did not become a "missing person" before anyone found out about his actions. In the summer of 1973, he decided to tell the English speaking newspaper in Athens about his plans to stage a protest outside the Executive Offices of the Dictatorship... a protest against American support as well as against the Junta. He made that protest and found himself in a Greek jail... He was lucky... Tip O'Neill was a friend of his Father's and made a strong case to the Junta to let him go, and he was expatriated from Greece to Israel in a matter of days. The Greek students who would protest in the fall of 1973 were not as lucky. Tanks rolled into Athens and opened fire on them killing hundreds.

Despite now being an "ex convict", he was proud of himself... he had risked his life for something he believed in and for people he loved... he had stood up for what he believed. A thirst for justice had been born... or maybe it had always been there... and it would never leave him.

Ablaze with this discovery, he still faced the question of what he wanted to do with his life... and began his searched for a mission... one that would make a critical difference in the lives of many people. The search spanned the next twelve years and included reading biographies of great people from Gandhi to Buddha to Mohammed and Jesus, not to mention more contemporary figures like Dr. Tom Dooley and Mother Theresa... but the mission never really surfaced with any kind of clarity. His efforts to find a mission led him to teach... but this wasn't quite right... he didn't know why.

With the prospect of marriage and family responsibility...the search took a new direction. Financial responsibility and security emerged as leading contenders for his attention. He was overwhelmed by the gift of four children and a lovely wife... and they became his only focal point...He went into the world of business... but somehow in the midst of financial success and a wonderful family, he found himself both very grateful for his good fortune yet very unhappy at the same time...He began to recognize the signs of his old thirst emerging...and he wondered if he needed to do something

more.

During this time, one biblical passage kept surfacing in his mind as he continued to think about what was important in life... and what he wanted to impart to his children. It was the passage where Jesus tells his disciples what they will be asked on Judgment Day... and it seems to me to be the passage where Jesus most clearly articulates what is important to him. He does not say that we will be asked what religion we were... or if we regularly went to Church... or even if we ever broke any of the commandments... he says simply that we will be asked, "What did you do for the least of your brothers and sisters?" He goes on to identify himself with these people when he declares, "Whatever you did for them... you did for me."

In 1990, lightning struck in very mundane situation. He was reading the paper one Saturday morning when his eye caught an article on an organisation that sent doctors and nurses to help children in Ecuador... in fact, the article claimed, these doctors and nurses changed the lives of these children by performing simple operations to repair facial deformities such as cleft palate. It came on him like an epiphany... "This is what I want to become involved with... I want to be involved in 'life and death' situations where I can make a tangible difference... After ruminating on this article the entire weekend... on Monday, he called the Por Cristo office and asked if he could volunteer to help in any way. Two years later, he was their full-time Executive Director.

For the next 6 years he learned about the field of international health, always looking for the "best" program making the most significant difference. He saw first hand the children and families that needed help desperately... and he was hooked. It became clear to him that investing his time and energy in developing countries was his mission... and that it yielded the greatest humanitarian return. He still didn't know the best way to help, and went from the small organisation, Por Cristo, which sent "MASH" teams on short term missions in various medical specialties... to Catholic Relief Services, a large organisation that has a variety of programs in food distribution, water projects, health projects, and micro-enterprise... in an attempt to find the "best" program in terms of maximizing humanitarian impact per donated dollar.

One day in 1996... it happened. Everything seemed to come together... and there was no trumpet blare or voice from the clouds. It happened while sitting at his desk reviewing mundane material from the World Health Organisation. The epiphany was a simple chart. It described the number of children who die each year in developing countries and the illnesses that account for these deaths. It staggered his imagination to see so clearly that 10,000,000 children die each year... More than that 7 in 10 of these children die from easily preventable illnesses- the DAMMM diseases of diarrhoea, acute respiratory infection, malaria, measles and malnutrition. His sense of injustice was re-kindled and inflamed, and he now had his mission... the one he had been waiting to discover all these years: "You must do something to stop this holocaust!" Though not in full detail, MEDICINES FOR HUMANITY was conceived that very day.

At this point, I felt that the hours of introspection Tim had dedicated to the journeyline exercise had served their intended purpose. In Tim's written document, we see that he has indeed reconnected with the key turning points in his life, and with his values. The core principles that drive Tim and MFH come across clearly: the desire to do something special, the sense of injustice, and the need to be involved with life and death issues among the poorest of the poor. Tim's stories are powerful, eloquent and well-expressed.

However, I had two areas of concern. First, Tim wrote in the 3rd person, as if seeing himself and telling his story from a detached, outsider perspective. As I will explain in subsequent sections, it is critical that a leader learn to speak from the heart and to tell his stories from a deeply personal perspective. I found it interesting that, of all the people I have ever coached in the exercise of uncovering and learning to tell their stories of identity, Tim is the only one who has ever chosen to write or speak from the 3rd person point of view. While I had not mentioned my misgivings about the 3rd person angle to him at this point, I wondered if choosing to write this way was a sign of a self-effacing modesty that could hinder Tim's ability to personalize his storytelling or to project himself to an audience. Second, when I asked Tim to articulate the same messages naturally, in spoken form and without reading from his notes, the result was far less eloquent than his writing. In fact, despite the new, more personal "material" from his inner journey, our protagonist's voice remained monotonous and uninspiring. His delivery lacked confidence, and he often hesitated and lost his "flow" at key transition points between the stories.

Tim had made a successful beginning on the journey inward to self-knowledge. Now it was time to begin the journey outward toward self-expression. We had reached the moment where we would increase the focus on the telling of his stories.

4.7 USING PERSONAL STORIES TO PERSUADE AND INSPIRE

While the profound self-understanding we aspire to in sections 4.5 and 4.6 forms the base from which we will work, it is clearly only a starting point. In order to lead, one must move beyond self-knowledge to self-expression. So, as we achieve clarity about what a leader stands for, and identify the stories that express his core beliefs, we concentrate increasingly on how to use these stories to influence others. In particular, I emphasize two principal concepts at this stage: (1) stories of identity help establish a leader's credibility and worthiness to lead and (2) it is through telling personal stories that an individual finds his leadership "voice".

4.7.1 Personal stories establish legitimacy and make transformational leadership possible

Shamir contends that the stories leaders tell about themselves are indeed an important source of information, conveying key messages about their traits, values, and core beliefs. These life stories often become the means by which leaders validate their capacity to represent the group and its values. In fact, individuals may sometimes lead by more by virtue of their biographies than by virtue of observed traits, behaviours or leadership style. (Shamir et al., 2002, Sadowsky, 2002b) In other words, followers' respect and admiration for the leader, and their identification with the leader, may be based to a large extent on what they know about the leader's life story.

Leaders' stories of identity create the basis for their legitimacy as group representatives and agents of change. For instance, if an individual wants to take the lead in modifying a group's conduct, the stories he tells about himself and his values must exemplify the behaviour he would encourage the group to live by, the very actions that others should seek

to emulate. A striking example of this phenomenon is Margaret Thatcher, who transformed a nation by presenting herself as a change agent whose personal values mirrored precisely the principles necessary for putting a "lost" Britain back on course. (Gardner and Laskin, 1995 p. 231) After convincing the British to vote for a change of direction in government, she emphasized the connection between her personal story and the her story for a new Britain: "The passionately interesting thing to me is that the things I learned in a small town, in a very modest home, are just the things I believe have won the election." (Little, 1988 p. 91) Hence, Thatcher's stories of identity formed the base for her transformational leadership.

In the spring of 2002, as Tim was learning to draw on vignettes from his past that revealed his inner beliefs, our discussions began to centre on how he could mobilize others to follow his lead. In fact, the theme of how to bring the involvement of others to increasingly higher levels would become an ongoing theme of our coaching endeavour. He had reconnected with his personal values—the desire to combat injustice, the longing to "do something special" rather than just a job, his ongoing search for a deeper purpose. Now, telling personal stories that demonstrate those values would emphasize his legitimacy as leader of an organisation with lofty humanitarian goals. Just as Margaret Thatcher's biographical stories helped convince her electorate that she was a woman capable of leading the transformation of Britain, each of Tim's personal stories was establishing his credibility as someone who could lead this emerging organisation, an organisation that would make a true impact on health care and child mortality in the third world.

Indeed, even at this early stage, in mid-2002, people close to Tim began to discern a change. To me, Tim was by no means an effective storyteller at this point, but the simple act of integrating personal stories into his daily interactions was raising his energy level, and bringing increased emotion into his discourse. As board member Dick Weisberg commented in June of that year: "You can see that he talks about MFH with vigour, with a gleam that he did not have before. Telling his stories has given far more energy to all his presentations. To us, on the board of directors, the stories are inspirational as well. I feel like Tim is truly beginning to lead us."(Personal communication June 18, 2002) Thus, the stories and the energy created around them were strengthening Tim's legitimacy as the leader of MFH.

Tim would later look back on this time period and observe that reconnecting with his past,

his personal stories, was pushing him to see new possibilities. In January 2006, he told me that telling the story of Father Frank Smith led to a deepening of their partnership: "Retelling the Father Frank story over and over caused me to reflect on the amazing work that he does, and that reflection motivated me to begin a new project with him...Retelling your story makes a lot of thing happen!"

As we saw in the case of Margaret Thatcher, history demonstrates that an individual's story can indeed alter the story of a group, even of an entire population. In another vivid example of this phenomenon, Simmons describes how Martin Luther King Jr. used story to inspire generations of African Americans to change their story from "I have been oppressed" to "I have a dream".: (Simmons, 2001 p. 125) King was effective at changing the group story because his own story garnered him striking legitimacy. In other words, the vignettes from his past were credible and consistent with the ideals, and the conduct, he was espousing. When King spoke to the issues on the minds of his audience—race, discrimination, violence, the church, the economic situation—he often did so in the form of vignettes from his past. His own stories of identity were never far from the surface. (Gardner and Laskin, 1995 pp. 208-9)

4.7.2 The telling of personal stories develops the leader's voice

In addition to establishing legitimacy, telling personal stories helps the leader find, and develop, his voice. For Bennis, one of the distinguishing characteristics of a leader is the emergence, over time, of this "voice", a set of clear and specific points of view that the leader yearns to articulate in ways that move and inspire others. (Bennis, 1994)

The examples of Martin Luther King, Margaret Thatcher, and the evolving case of Tim Bilodeau show three very different leaders, all of whom discover and develop a powerful leadership voice through telling and retelling their personal stories. After coaching and studying leaders for more than ten years, I have reached one conclusion that I cannot emphasize enough: It is through the act of retelling one's stories that one develops a leadership voice.

It is striking to me that much of society seems to believe that some individuals are simply gifted communicators. In my work and my teaching, I often hear observations such as: "I

have never been very good at expressing my thoughts in public", or "Isn't she fortunate to have such a gift for communication!" Interestingly, my experience and research have led me to the opposite conclusion—that there are no born communicators. Certainly, some human beings have more innate talent for self-expression than others. Nonetheless, if one studies the cases of those we tend to think of as "natural" communicators—the Martin Luther Kings or Margaret Thatchers of the world—one finds that these individuals have practiced, and practiced *a lot*. Their voices, and their self-confidence, emerge and develop as they repeat their stories, over and over. In other words, it is the *telling and retelling of one's personal stories of identity* that leads to clarity of thought and expression. In my own coaching work, as well, I have witnessed this phenomenon numerous times. Tim Bilodeau is certainly an example of a leader whose vision and voice seemed to gain clarity and strength with each telling.

Clarity of voice is undoubtedly one of the keys to persuasion. As stories constitute the primary vehicle for articulating our leadership voice, I return often with clients to a recurring theme gleaned from my coaching experience: The most effective communicators persuade with stories that are clear, direct and simple. Their stories leave us with clear images of who they are, what they stand for, and the future they envision. Thus, to influence others, a leader must learn to tell stories simply and with passion, to paint pictures that they will stay in the listeners' memories.

Stories of influence may be about the past (for example, stories of who I am and what I stand for), the present (stories of collective identity), or the future (stories of possibility). But, the principle of our storytelling is always the same: we make every effort to leave clear and vivid images in the mind of the listener, images that encourage the listener to espouse similar views and to create similar stories. (Simmons, 2001 p. 123) *When Tim Bilodeau tells the tale of his arrest in Greece, we are captivated by it, and we remember it, because of the striking descriptions he uses to take us there. Then, when he talks of the "intolerance for injustice" that drives his organisation, the concept is immediately convincing, and it stays with us, thanks to the clear and simple images that his "Greek jail" story left in our minds.*

Often, a leader's most influential stories are the clear and simple visions of the future he offers to followers, portrayals so cogent and vivid that they transport the listener to a new reality. In *Organising Genius*, Bennis and Biederman profess that great leaders are not

afraid to dream, and to use simple and stirring future stories to convey their dream to those around them. (Bennis and Biederman, 1997) Frequently, when I talk to entrepreneurs or read the written accounts of their beginnings, I see that they visualize a future long before it comes to pass, and their stories emerge from a lucid and uncomplicated vision of a future that exists only in their imaginations. For example, Howard Schultz, CEO of Starbucks, tells a story from the days immediately before his acquisition of the company: "We had not yet completed the Starbucks acquisition. The next day, as we made our way through Chicago's crowded streets on our way to look at sites, I said, 'Jack, five years from now, every one of these people is going to be walking around holding a Starbucks cup.' He looked at me and said, laughingly, 'You're crazy.' But I could just see it." (Schultz and Yang, 1997 p. 112)

4.7.3 Leaders learn to use their autobiographical stories naturally, and in diverse contexts

In essence, much of my coaching involves teaching people to express themselves—through their personal stories, with simplicity and passion—on the "platforms" of their daily lives. In each situation, we seek to weave our personal stories into our everyday discourse, to use our stories to express our points of view, our values, our vision of the future—to teach and influence others. The contexts I propose for practice will vary for each individual, but they might include:

- Telling an old friend what is exciting about your work today, and relating it to your values
- Making a new contact at a networking event or at an industry conference
- A school reunion: what do you tell classmates about your work, and how do you express it?
- Convincing investors (at an investment conference or IPO road show)
- A speech to a group of students (your former high school, or my leadership class)
- A "where we're going" speech to your company or your workgroup
- At an informal "tribal campfire" with employees, over coffee, lunch, or a drink

- In "teachable moments" with individuals from all your constituencies
- Huddling with teams or small groups of employees
- Selling to new clients
- The elevator pitch: explain what you do or what your business is to a stranger in 1-2 minutes

When discussing the varied situations where a leader can persuade others with personal tales, I make sure to emphasize a core conclusion of my coaching and research—that storytelling as a tool of influence is very much underutilized in organisational settings. Many of my clients, even after they "get" the power of storytelling, do not draw on the numerous opportunities for using this technique in daily business life. So, I explain that during my ten years of coaching leaders, I have become increasingly convinced that stories are the most effective way to portray the behavioural or cultural changes one would like to implement in a group. In fact, my observation and study often find that the most effective leaders use storytelling <u>relentlessly</u> for transforming corporate culture and moulding employee behaviour. Jack Welch, whom most of the general populace tends to see as a tough, execution driven, management-by-objective style leader, used storytelling constantly to influence the culture of General Electric. (Cohen and Prusak, 2001 p. 114, Tichy and Cohen, 1997 p. 180) He told a consistent, credible, and passionate story of the new GE, and he told the same core story to all audiences, across all contexts.

As Tim's personal vignettes were quite revealing of the values of MFH, I wanted him to become comfortable using storytelling to express his core concepts to his varied constituencies, just as Jack Welch had done at General Electric. In the version below, we were working specifically on bolstering the link between Tim's autobiography and what MFH stands for. I asked him to "hammer" on his key points—the guiding principles of MFH and their origin in his personal stories—by stating them explicitly and then repeating them for emphasis. This "hammering", I felt, would cement the connections in his own mind, provide an organising logic to his speech, and add energy to his style. With clients, I often use this device of hammering as an intermediate step. Once Tim was comfortable with putting together a speech and telling the stories, we would make the same connections more implicitly and quietly, or let the listener make them.

Since Tim was having difficulty organising his thoughts and constructing a speech, I suggested that he continue the "why I do what I do" theme, keeping the structure

uncomplicated, and using 3-5 vignettes whose detail he had already mastered. As is often the case with those I coach, I sensed that he was overly concerned with getting to all his points and not leaving anything out. Simplifying the structure would help him hone in on a few key points and not lose his train of thought. The version below is typical of the iterations we were working on in the summer of 2002, actually written in August of that year.

Illustration 4: *"WHY I DO WHAT I DO" SIMPLIFIED, AND IN SPOKEN FORM*

Thanks for inviting me here tonight to tell you about MFH. I think the best way to help you understand what we do and why we do it... is to share a few background stories.

Back in 1972, there was a young man who had the world by the proverbial tail. He had it all figured out. A successful scholar-athlete at Harvard, he was determined to follow his father's footsteps and become a lawyer. One day as he was coming home to prepare his law school applications, his world fell apart. His Dad met him at the door and told him he had some bad news. His best friend, Collie Gillis, had been killed in an automobile accident that very day. In the course of the next hour, his father said something that changed the course of his life. He said, "You know, son, the best advice I can give you in dealing with this is to make yourself a promise that every once in a while throughout your life, you'll do something special for Collie".

"Doing something special"... this is significant for MFH. In fact, it's at the core.

The second vignette I'd like to share with you takes place a year after the first, in 1973. The young man put his plans for law school on hold, and took a "flyer" on a teaching fellowship at Athens College in Greece. He was looking for his special mission in life. He didn't find it right then, but he did discover something important about himself.

Greece was a Military Dictatorship at the time, and the young man knew that many of the Greek people, including his friends, were suffering. Many had lost loved ones to the secret police. The freedom loving Greek people had no freedom, and the young man decided to do something very brave or very foolish depending on your point of view. He felt a strong urge to take action and decided to stage a protest against the Dictators, knowing that he was risking his life. No Greek would survive for long if he protested in public, but an American just might if he did not become a "missing person" before anyone found out about his actions.... So he told the English speaking newspaper in Athens about his plans to stage a protest outside the Executive Offices of the Dictatorship... and he did. He ended up in a Greek jail, but he lived and discovered something about himself in the process. He had a special gift that was both a blessing and a curse... using the words with

which Thomas Jefferson described the Presidency, he called this gift his "Splendid Misery". He had an exceptionally developed intolerance to injustice... and the need to do something about it.

Intolerance for injustice and the need to do something about it. This is what drives MFH.

Now let me update you on what happened to my friend in the Greek jail... 20 years pass and it is now 1992. He has put on a few middle age pounds but he's still very good looking! He has still not found a special mission to satisfy his splendid misery... but on the surface he has a great life... having gone back to business school he has been very successful financially, he has a great wife and four terrific children. All seems well, but behind the scenes he doesn't feel a great sense of satisfaction... something is missing and he feels a certain emptiness and lack of meaning. His "splendid misery" had been dormant for such a long time... It was the summertime, and he was spending a lazy weekend on Nantasket Beach, reading the paper... when the epiphany struck. A simple newspaper article about the condition of children in Ecuador, and about a group of doctors that were trying to do something about it. In fact, the article claimed, these doctors and nurses changed the lives of these children by performing simple operations to repair facial deformities such as cleft palate. Bingo... he knew that was what was missing... he wanted to be involved in life and death situations and make a vital difference in peoples' lives. You can imagine the scene he created on the beach when he suddenly leaped out of his lounge chair and ran up the beach like his feet were on fire... I think the people around him believed he was responding to a sudden call of nature... but he was running to find a phone to call the number given in the article for those that wanted to get involved.

Making a critical difference in life and death situations... this is what MFH strives to do.

With this background... the desire to do something special, sensitivity to injustice and the need to respond, and the hunger to make a critical difference in peoples' lives... let me tell you about our mission at MFH.

One of the places we help is in Haiti, in a slum called Cite Soleil. About 300,000 people live on top of a landfill in shacks so crowded they have to sleep in shifts. The place is run by drug dealers. The kids there are all malnourished and die from things like diarrhoea and pneumonia because they don't have the medicines or are too poor to buy them. About one kid in five won't live until their fifth birthday. The women we work with there are great. They are Daughters of Charity and run a school, a clinic, a centre for malnourished kids, a training centre for women and they've started a sewing cooperative so that women can earn some money to feed their families. We get them the medicines they need to take care of these kids. These women treated over 25,000 children in the last six months with our medicines... they're so pleased to have medicines to give out, and they know they're saving the lives of many of these kids.

In fact, that's what we do around the world... we target areas with the

highest child mortality, identify dedicated health providers in those areas, and send the medicines they need to save the lives of children. We think that's pretty special.

Let mė tell you how injustice and responding to it is at the core of MFH. The events of 9/11 outraged us all. In one day, over 3,000 people died. They were totally innocent, and their deaths were totally unjustified. What if I were to tell you that another tragedy happened today... a tragedy where 30,000 people lost their lives. These people too are totally innocent and their deaths are totally unjustified. In addition, what if I were to tell you that they are all children... and that their deaths are totally unnecessary. In fact, this is what is going on today and every day around the world. Every day, more than 30,000 kids die because they don't have very basic medicines.... Let me give you an example... when a baby has diarrhoea in the U.S., you go to the pharmacy and buy pedialite... in developing countries... the baby often dies from dehydration. These children could be saved if they only received an inexpensive version of pedialite called "oral rehydration salts".

Another example...virtually every child in impoverished areas of developing countries has parasites... worms. These worms eat up to 25% of whatever the child eats. In areas of high malnutrition, this is catastrophic. This chronic malnutrition can be kept from becoming lethal by taking two tables of anti-parasite medicine a year and some multivitamins... but they don't have them.

Every year, in fact, over 7,000,000 kids die from what we call the DAMMM diseases: diarrhoeal disease, acute respiratory infection, malaria, measles and malnutrition. These children are totally innocent... they have done nothing wrong... they were simply born in the wrong place at the wrong time. Think about it... 7,000,000 kids a year... that's an annual holocaust and it doesn't need to happen. The fact that these deaths are preventable with basic medicines... and that's what MFH does... we get these basic medicines into the hands of reliable local providers.

I'll never forget being with Father Frank Smith, a Mill Hill missionary in the slums of Guayaquil, Ecuador... as he was consoling a mother who's 3 year old son had just died. I saw her break down in tears several times, and after she left I asked what had happened. He told me that she had said she didn't buy medicine for her child, and asked for forgiveness. He said I asked her, "why not"... and she had said that if she bought the medicine she couldn't afford to buy food for her other children. I asked him what happened next and he said "I told her no one should have to make that choice."

Do we make a life and death difference? You bet we do! By targeting areas of high child mortality, identifying the medicines needed, negotiating with pharmaceutical suppliers to get the medicines at a small fraction of wholesale price, and donating medicines that prevent and treat children for these illnesses, I am involved in life and death situations on a daily basis. MFH saves the lives of innocent children... and forever changes the lives of impoverished families by getting needed medicines where they are needed when they're needed. People ask me why I help around the world when there's so much that needs to be done at home...and I give them roughly the

same answer Willie Sutton gave when asked why he robbed banks... he said..."cause that's where the money is." As I mentioned earlier 7,000,000 children each year in developing countries die from easily preventable diseases... and that's where the humanitarian need is the greatest.

It's why I love my job. I'm involved daily making a life and death difference in the lives of impoverished children around the world... and it feels great! When Sr. Jane Buellesbach, a Maryknoll sister and MD working in Malacatan, Guatemala tells me that she feels like it's Christmas when she gets one of our shipments... and that she wouldn't be able to treat the children in that area without our help... it gives me a sense of satisfaction that is beyond compare.

Finally, let me ask you to do something for me. Imagine that you are asked to give a talk to your parish or congregation. The topic is a bit unusual... it is to be a reflection on the following: "What will I be asked about my life when I meet my Maker face to face?" What do you think you'll be asked when that day comes? Will He ask you about the commandments- "Did you break any?"...Will he ask you what happened in the back of the Chevy that time when you were 16 years old? Will He ask if you were faithful... if you went to Church on a regular basis... or will he ask you if you were successful... and if you provided for your family?

I was actually asked to do this and I just couldn't figure it out. Finally I was flipping through the Bible in desperation and I found it... the place where Jesus tells us what we'll be asked... it's in the gospel of Matthew... I had heard the passage many times but it never occurred to me that this is the "Big Enchilada" so to speak... you may remember it. Jesus reveals that we will not be asked what religion we were... or if we regularly went to Church... or even if we ever broke any of the commandments... We won't even be asked how well we treated our families and friends or how much we provided for them.... Maybe he takes all this for granted. What does he say we will be asked? He's talking about the Last Judgment and, paraphrasing, he says that we'll be split into two groups... the sheep and the goats... He'll say to the sheep, "When I was hungry, you gave me food, thirsty, you gave me drink, sick, you took care of me, naked, you clothed me... and they said somewhat astonished... "When, Lord, did we do this?" And he answered..."Whatever you did to the least of my brothers and sisters... you did to me".

So these are the key questions we will be asked... "When you saw me hungry did you feed me... naked did you clothe me... sick did you care for me...What did you do for the least of your brothers and sisters?" This is his criteria... this is what Jesus considers important and how he measures success... this is his "key to a good life"... in fact, he presents it as the key to eternal life.

MFH is inspired by this parable. My hope is that MFH may be a vehicle of success and satisfaction... real success and real satisfaction... for you as it is for me... so that if you're ever asked these questions you may respond with confidence, "I have touched the hearts of impoverished children and their

families around the world. I have made a life and death difference to the least of my brothers and sisters."

At this juncture, I had observed several encouraging elements in Tim's evolution. First, he had begun to use quite effectively the "why I do what I do" model as the unifying concept to organise his thoughts. Second, we could now see the clear links between Tim's stories of identity, his core beliefs, and the values of MFH. Third, though one cannot discern it from the written versions we see in this document, my live observation revealed beyond doubt that Tim was gaining confidence in his emerging leadership storyline. Indeed, practice and repetition were strengthening his conviction and self-assurance. I felt we had reached a significant milestone: both Tim and I now agreed that his story-based discourse was far more persuasive than any of his earlier presentations.

At the same time, I noted some areas for improvement. By now, we were practicing live frequently, either in person or by telephone, and the force and conviction I could see in Tim's writing and conversation was not coming through in his speaking. In our mock sessions—whether simulating formal or casual circumstances—Tim's the delivery was rather static and monotone, lacking energy. Feeling a need to "perform", he often became self-conscious: the stories, and his transitions between them, were not flowing smoothly. Without a doubt, the most glaring weakness I saw in Tim's oral communication was a dependence on reading from his notes. In the ensuing months, I would make a top priority of developing Tim's confidence until he could learn to "let go", to speak without what Tim came to call the traditional "crutches"—PowerPoint slides, written notes, or memorisation. It would take a good deal of time and practice!

In addition, there were two points of detail that I felt a need to modify. First, in the version above and numerous others from this period, he informs his audience at several points that he will tell stories, rather than simply letting the stories "happen". (I invariably find it more effective just to tell your stories, without telling the audience that you are going to tell them.) Second, and though I still had not brought up this facet with him, Tim's impact was diminished by his reluctance to "take ownership", i.e. to speak directly to his audience from the first person point of view.

Despite the aforementioned aspects that would need additional attention as we moved forward, we could take some satisfaction in Tim's progress. The storytelling concept

and some central stories were now becoming part of his modus operandi, *and he was connecting his personal stories clearly to MFH's organisational values. Moreover, unsolicited feedback from the MFH inner circle revealed to me that Tim's novel story-based approach was perceived and appreciated by those around him. For example, Kate Lacatell, a long-time acquaintance of Tim who was later to become the company's first full-time employee in July 2003, noted a change, a new and different "off the cuff" style that she termed "extremely engaging". Without knowing that we were working on story-based discourse, Kate had already begun to observe the result of our efforts. (Personal communication June 3, 2002)*

4.8 ENGAGING THE FOLLOWERS

As we continue to craft and tell our personal stories of identity, we put increasing emphasis on stories of inclusion—stories of group identity and of a shared future. We make sure we are extending our stories to those around us, engaging them in the collective "who we are" stories that will inspire and align our groups. While it would not be accurate to speak of separate stages or phases in learning to use storytelling more effectively (for example, the phase of personal reflection and telling personal stories of identity never ends!), the distinction we can make with section 4.7 is that we now concentrate on making our stories increasingly inclusive and participatory. The leader's personal stories must in some way inspire shared group stories.

Until the summer of 2002, Tim and I had focused on communicating with an external audience in public speeches and statements. While this external focus was to continue, we now introduced the concept that his stories could engage and motivate his internal audience as well. Also, we began to speak not only of motivating employees and board members, but also of bringing them into the process as propagators of the MFH stories. Thus, we will begin to work on stories of collective identity and shared purpose.

In all cases, the first step in engaging and including others is listening to them. Bennis writes that leaders must be capable of deep listening, as was Gandhi when he traveled across India to learn the heart of his people. Without listening, leaders will not see what is

meaningful to followers, and thus their stories of purpose will not resonate. Leaders' stories are based on their own identities, but also crafted around the needs and desires of the followers. When leaders listen carefully to the followers, they are more able to find the voice that allows the articulation of a common dream, even a dream that the followers may not be able to describe themselves. As Bennis puts it: "Effective leaders put words to the formless longings and deeply felt needs of others. They create communities out of words." (Bennis, 1996 p. 6)

In our stories of community and of a collective future, we seek to align people with purpose. We look to provide the clear sense of shared destiny that is the basis for group bonding. However, shared destiny and group bonding are not sufficient; if we are to truly motivate others, it is crucial that we bring them onto the stage as actors, not only as listeners or passive devotees. If we are to inspire followers to deploy their energy toward reaching our common goals, our shared stories must offer them true meaning. (Bruch and Ghoshal, 2004) Where do individuals find the sense of meaning and purpose? According to MacIntyre, humans create their sense of what matters by answering the question: "Of what stories do I find myself a part?" (MacIntyre, 1984 p. 216)

Since people find meaning when they see themselves as part of a worthy story, a leader's stories must trigger stories in the minds of those around him. Denning says that in the entire storytelling dynamic, the most important story is not that of the teller, but the one in the listener's mind: "The meaning is not in the story itself, but rather in the meaning that the listeners create out of the story, linked to their own context." (Denning, 2001a p. 69)

The striking success of Medicines for Humanity is largely the result of Tim Bilodeau's ability to engage and inspire board members, employees and volunteers. People make a profound commitment to MFH because Tim's stories appeal to individuals' quest for meaning, their desire to be involved in life's big issues.

Pearce feels that most leaders fail to recognize the power of this simple truth: vast numbers of human beings simply want to be involved, in some manner, in the great matters of life. As evidence, he cites the success of Stephen Hawking's book, *A Brief History of Time*, which has sold more than six million copies in thirty languages since its publication in 1989, despite the fact that most readers are not capable of understanding the book's hypotheses or explanations. According to Hawking, to read and understand the book—an explanation of the search for a unifying theory of the origins and the workings of the universe—one

would need the level of a Ph. D. student in theoretical physics. While many explanations have been offered for the book's unforeseen popularity, Hawking says the reason is simply the public's longing to be involved in the discussion of "really big questions." (Pearce, 1995 p. 80) MFH flourishes because of Tim's ability to tap into the same basic human longing.

The importance of engaging others in our stories and in the act of storytelling cannot be overemphasized. Stories that engage serve a dual purpose: Not only does the leader inspire others with his positive vision of the group's future, he also enlists them in the process of telling the stories that will persuade the entire organisation. Gabriel reminds us that stories are wonderfully effective vehicles for communication throughout organisations, since their propagation can be viral: "Unlike film or theatrical audiences, the audiences of stories are potential storytellers or disseminators of the story; thus do stories travel from mouth to ear and from ear to mouth, undergoing embellishments and elaborations along the way..." (Gabriel, 2000 p. 11) Whenever I coach a leader, I encourage him to use the viral nature of story propagation, this phenomenon of self-repeating and embellishment.

Since the notion of engaging others in our stories of identity is such a critical factor to our success, I will outline some key points here and discuss them in depth. In our stories of engagement, we focus on:

- Describing everything as a shared undertaking
- Portraying a desirable future that excites their imaginations
- Taking them beyond belonging—toward deeper purpose
- Making them characters in a remarkable story, and calling them to action
- Maintaining a sense of ritual—sustaining the tribal campfires
- Enlisting the followers as active storytellers

4.8.1 Describe everything as a shared undertaking

Describe everything as a shared undertaking through stories of collective identity: One small but important piece of advice that I often give to those I coach or teach is to substitute the word "we" for the word "I" whenever possible (and this is possible

surprisingly often, once we develop the habit). Simply using the word "we" with employees and in public statements—making the people around us feel a sense of ownership and belonging—is in itself quite forceful. In fact, in the book *Culture Jam*, Kalle Lasn argues that the most powerful narcotic in the world is indeed the promise of belonging. (Lasn, 1999) This "narcotic" increases dramatically in power if the leader can provide the group with a unique identity and convince the members that they are somehow different and special. (Tichy and Cohen, 1997 p. 174)

Often, it is these stories of collective identity, above all else, that energize and focus organisations. For example, Nike people share the story of "just do it". Internally, it is more than a marketing slogan; it is a credo they try to live by in their business activity. They see themselves as quick movers, a rebel force in their industry, unencumbered by the bureaucracy and stodginess of their competitors. This story of identity engenders a culture that encourages Nike people to act faster and more decisively than their competitors. Stories of collective identity are so important at Nike that the initiation of new employees begins with a two-day immersion in the company story. (Sacharin, 2001 p. 122)

Southwest Airlines has stories similar to those of Nike about how employees are expected to behave. During Herb Kelleher's tenure as CEO, employees were encouraged to act with boldness and independence, because they all knew the collective "who we are" stories of their leader. Kelleher told his stories of collective identity constantly. (Kelleher, 1997)

When we see or read about extraordinary group performance of achievement, we often observe the same striking phenomenon: followers are willing and even happy to labour long hours and make great personal sacrifice when they feel part of a common quest, a shared undertaking. For example, former Apple Computer CEO John Sculley describes his astonishment when he first visited Macintosh headquarters. What he discovered was a team for whom putting in impossibly long hours was not considered a sacrifice or a chore, but one of life's ultimate pleasures. Sculley attributed this remarkable attitude toward work as a tribute to Steve Jobs's leadership, particularly his ability to make the Macintosh a true group story, the ultimate collective task. (Sculley and Byrne, 1988 p. 159)

In the early days of Medicines for Humanity, one of Tim Bilodeau's truly exceptional attributes was his understanding of the motivational force of the shared undertaking. As in the case of the Macintosh team, the board members, employees, and volunteers of MFH

came to exhibit an extraordinary commitment to the company, in large part because Tim succeeded in making it *<u>their</u>* *enterprise.*

In the summer of 2002, Tim asked me for advice about getting board members to assume greater ownership of the fledgling MFH project. After a short discussion, we decided that he should involve them as active participants in the crafting a corporate "who we are" story. The "group identity" project would be implemented in three phases during a period of one year. First, from June to December, Tim would make a specific point of telling his own stories of identity—the ones we had spent so much time working on—to the board members on a regular basis. The sharing of Tim's personal stories at board encounters would set the stage, providing the "space" and the framework for his listeners to construct their own stories. Then, he would use the forum of board meetings to encourage people to share elements of their own personal tales. Accordingly, the second phase would begin at the January 2003 meeting, for which Tim would ask each individual to prepare an explanation of his motivation for involvement with MFH. These stories of motivation *would reveal individual dreams, and provide fuel for the definition of the group's shared purpose. Then, in June 2003, the board would actually tell stories to each other, specific anecdotes from the individuals' past that would shed light on everyone's decision to commit significant amounts of time and energy to MFH.*

In sum, from the beginning of MFH, the founder sensed that his organisation's growth would depend on more than his own ability to inspire. He understood the need to make MFH's mission and collective purpose explicit, to get deep personal buy-in from his close collaborators. Though he did not use this terminology, Tim wanted individuals to personalize the MFH story and *carry it to the world around them.*

4.8.2 Portray a desirable future that excites their imaginations

We work on telling stories of possibility, stories of a future that exists today only in the leader's imagination, but a future that becomes increasingly real for the listeners, as they hear the voice of the leader. In their study of great groups, Bennis and Biederman observe that the leaders actively prepare themselves and their groups for a specific future that exists only in their imaginations. (Bennis and Biederman, 1997 pp. 207-09) Telling stories of the future is among the most effective of the leader's tools, creating a picture in people's

minds of what is and what could be." (Neuhauser, 1993a p. 59) Indeed, if we want to influence group behaviour, to enlist others in change, we must paint pictures of a future that the followers can see and feel. (Tichy and Cohen, 1997 p. 174)

In *True to Our Roots*, a book about his experience at the Fetzer Winery, CEO Paul Dolan describes how he created a vivid picture of the future so it could come to life for others in the organisation. His story combined a story of identity (we are special people) with a future story, a story about "who we can become", and it was encapsulated in a simple phrase: "Fetzer people: enhancing the quality of life." In a more protracted version, he explained that Fetzer would be an environmentally and socially conscious company that produces wines of the highest quality and value, while at the same time embracing, and taking responsibility for, its higher societal mission. (Dolan, 2003)

4.8.3 Take them beyond belonging—toward deeper purpose

Effective leaders often depict the collective task as urgent and essential, infused with meaning. Thus, one of my basic functions in coaching is help the leader find stories of shared meaning and purpose, the stories that will spur the followers to new heights of commitment and performance. These stories engender a feeling of pride, the force that Katzenbach points to as the ultimate source of energy in the "peak performing organisations" he has worked with and studied for nearly 50 years. (Katzenbach, 2003) In reviewing Katzenbach's 2003 book, for *Fast Company*, Polly LaBarre sums up the central argument: "People who are emotionally committed to something...behave in ways that defy logic and often produce results that are well beyond expectations. They pursue impossible dreams, work ridiculous hours, and resolve unsolvable problems." (LaBarre, 2003 p. 38)

Winning leaders provide a grand sense of scale, showing followers the opportunity to make a difference in a bigger arena than they had anticipated. By communicating a story of deeper purpose, and inviting listeners to become part of something larger than themselves, the leader motivates by touching the universal human search for meaning. (Senge, 1990 p. 354) The purpose story motivates not only by providing the group a personal mission, but also by placing its accomplishments in a larger context.

Illustration 5 : ***STEVE JOBS, MACINTOSH, AND DEEPER PURPOSE (Historical illustration)***

One of the masters of this type of motivational discourse—combining belonging and shared identity with a deep feeling of pride and purpose—was Steve Jobs in the early years of Apple Computer. Under Jobs, the Mac team became the ultimate heroic underdogs, taking on not only competitors but the nonbelievers inside Apple as well. They were rebels; their spiritual leader, Jobs, raised the pirate flag outside the Macintosh building, and he challenged team Macintosh to put "a dent in the universe." (Bennis and Biederman, 1997) Jobs' discourse was extremely effective, since engaging followers means not only defining a shared identity that resonates with followers, but also connecting them to a deeper purpose.

The Macintosh group achieved truly remarkable results by combining all the elements cited above. Not only did the members feel part of a special group, they were convinced that their shared mission was important, not only for themselves but also for all of society. Jobs fanned the inspirational campfires by telling tales of a common enemy, using images that evoke epic struggles of light and darkness, much like *Star Wars*, or *The Lord of the Rings*. Casting IBM in the role of the dark foe, Jobs pushed his software development team to superhuman limits. As deadlines approached and programmers worked bleary-eyed around the clock, their leader employed a classic "good and evil" storyline to energize these dedicated team members: "If we don't do it, IBM is going to take over. If having really great products, much better products than theirs, isn't enough to compete with them, then they'll have the whole thing. They'll have the greatest monopoly of all time...If we don't do this, nobody can stop IBM." (Levy, 1995 p. 177)

In the age of information, where workers are drowning in facts and data, people don't want more rational argument. They long to be part of something significant; they need a story that explains what it all means and where they fit in. Leaders like Steve Jobs use storytelling to tap into the basic human desire to do something meaningful. As he elucidates: "What Apple has really been to me is an opportunity to express some deep feeling about wanting to contribute meaning. I really believe that people have a desire to put something back, to give something in a greater way...In a sense, that's part of the joy of Apple Computer...[The company is] a sort of framework...where if it's done right, people can really put something back. (Ray and Myers, 1986 p. 182)

Articulating a common dream, and a deeper sense of significance, has long been a key element of success in any group venture. In a 2004 study of the expedition of Lewis and Clark, *Into the Unknown*, Jack Uldrich explains that this 1803 voyage to explore the unfamiliar Louisiana Territory is still widely considered one of the most fascinating and successful exploratory voyages in history. Facing years of hardship and seemingly

insurmountable obstacles, the team members remained focused on a goal because the leaders were able to express the common vision in vivid and inspirational terms. While most historians agree that the participants accomplished amazing feats, Uldrich's work highlights what he considers that the expedition's outstanding trait—its commitment to a higher purpose. (Uldrich et al., 2004)

Certainly, Lewis and Clark were not unique in their ability to motivate by weaving stories of commitment to a higher purpose. In fact, this capacity to inspire with a vision of a more exciting future seems to be a recipe for success. According to the authors, among the great innovators and businessmen of the last 2 centuries, there is one common theme that unites them all: the belief that business is something more than making profits. (Uldrich et al., 2004)

There is significant anecdotal evidence that stories of purpose improve group performance. (Bennis and Biederman, 1997 pp. 204-6) In addition, the world of sport provides numerous examples where teams with inferior athletic talent—but with a superior sense of meaning and mission—win championships, seemingly against all odds. In fact, to find such an example, we need look no further than the 2004 NBA championship series between the Los Angeles Lakers and the Detroit Pistons. When the undermanned Pistons defeated the heavily-favoured Lakers easily in 5 games, the sports world was shocked. Basketball legend Oscar Robertson, one of the rare few who had predicted a Detroit victory, attributed the team's accomplishment in large part to first-year coach Larry Brown's success in crafting, and telling, a new and different story—one of harmony and unselfishness—and in generating buy-in for his story, even from some formerly recalcitrant players. (Robertson, 2004) Changing the team's culture, its mindset and attitude, meant changing the team's stories, and then engaging the followers in the new story of larger purpose.

When Phil Jackson took over as coach of Michael Jordan and the Chicago Bulls in 1988, he inherited a team with some of the league's most talented and spectacular players, but which had not won a title. One of Jackson's central goals from the outset was to raise the team's level of consciousness, to remind them continuously that they were part of a large and noteworthy quest, and that their collective pursuit carried an importance far beyond the individual players, the stardom, money, and egos. Jackson chronicles, in deeply spiritual terms, the search for collective meaning: "The most effective way to forge a winning team

is to call on the players' need to connect to something larger than themselves. Even for those who don't consider themselves 'spiritual' in a conventional sense, creating a successful team—whether it's an NBA champion or a record-setting sales force—is essentially a spiritual act. It requires the individuals involved to surrender their self-interest for the greater good so that the whole adds up to more than the sum of its parts." (Jackson and Delehanty, 1995 p. 5) Jackson used storytelling extensively, and from a variety of sources—his own experience, Zen Buddhism, or the Lakota Sioux tribe of his native North Dakota—to guide the team in the direction of unselfishness and superior cohesion. Under the coach's leadership, their ultimate mission became more about creating a unique team spirit, an example for the modern sports world, than about the mere act of winning games or even championships.

In the military as well, leaders must convince followers to pursue a collective course, rather than a self-cantered one. Units can only be effective if team members see collaborative goals as far more important than individual desires or objectives. The only way to foster such behaviour is though group bonding around stories of identity, of shared *conviction, and of deeper mission and purpose. Michael Abrashoff, former commander of* the *USS Benfold*, describes his experience motivating troops to go to war: "Few actually want to go to war. But when directed, they all willingly answer the call, because they believe deeply in their purpose...In my experience, any leader, military or civilian, has one priority: the quality of the people under his command...A leader's job has to be all about growing people: turning self-absorbed individuals into a cohesive unit, bound to one another by their skills and loyalty." (Abrashoff, 2003 pp. 40, 42) As did Phil Jackson, Abrashoff relied on story and symbol to convey his messages of trust, teamwork, and larger purpose.

Stories of deeper purpose are the ultimate motivator for any workgroup, the force that drives a team to exceptional performance. According to Bennis, the study of great groups reveals that they always "think they are on a mission from God, doing something urgent and monumental." (Bennis and Biederman, 1997 p. 204) Bruch and Ghoshal argue that successful groups always feel that they are "slaying dragons and winning princesses." (Bruch and Ghoshal, 2004) In my view, one of the most important functions of any group's leader is to craft and tell the stories of dragons and princesses that supply the emotion—the sense of pride, of importance, and of deeper meaning. For example, at stockbroker Charles Schwab, CEO David Pottruck refused to see his company's work as

managing money. Rather, Schwab people were the custodians of their client's dreams. By defining a cause, not merely a business, a mission as opposed to a task, he was able to convince employees that their work was truly essential to their customers' well-being, that what they did every day mattered deeply to the world. As he describes: "Around here we think we're curing cancer." (Pottruck and Pearce, 2000a)

4.8.4 Make them characters in a remarkable story, and call them to action

With their stories of greater purpose, leaders enlarge the perspective of those around them. For the story of greater purpose to truly become a force in the hearts of the team members, we need to make them key players in an evolving story. For example, David Walsh, reporter for *The Times* (of London), describes the great success of Middlesbrough football club manager Steve McClaren, who would go on to become England manager in 2006: "Through his first season in football management, Steve McClaren spoke constantly to his players about the journey that he and they had begun." (Walsh, 2002 p. 15) The concept of being on a journey, rather than simply performing a job, is often inspirational. Thus, whenever I coach a leader, we work on listening to the followers and searching for ways to connect with them, continuously and on their terms. Dreaming together involves guiding, listening, including, and then sharing the story, the dream and the collective meaning, with our key followers. Once their hearts are engaged, the world of the organisation becomes a theatre where an unfolding drama is enacted every day.

The power of this process is that a well-crafted, credible and sincere story can become self-fulfilling, through three intertwined and iterative steps. First, the leader crafts and tells the story of identity. Second, the group—leader and followers—tells the story, and in the process of repeating it, comes to believe the story and, increasingly, to believe in the story. Third, as members of the team participate, enacting the story through their daily activities and behaviour, the story is simultaneously creating the group. The group, now living its story of identity, rises to new levels of performance and commitment. Often, a new iteration then begins, with the leader embarking on a more ambitious and meaningful storyline. Thus, the leader and the group are embarked on an ongoing and iterative journey, where each new and evolving version of the story becomes self-fulfilling. I can honestly say that I have

watched in fascination on numerous occasions, as an organisation's story moves to a higher plane with each successive iteration. Indeed, Tim Bilodeau and MFH provide a striking example of leader and story co-creating each other.

4.8.5 Tim's story grows, as a co-creation

Medicines for Humanity began when Tim left his job in 1997 and *convinced a small group of his friends and collaborators to form a Board of Directors, in order to help his fledgling one-man organisation have a small impact on a large problem: needless child mortality in impoverished countries. When I discussed Tim's core beliefs with him and agreed to serve as his leadership coach, I encouraged him to find, craft, hone and tell his stories of identity, using the basic process described in this document. His voyage of introspection and self-discovery helped him uncover or rediscover deeper values and principles, which made the stories from his journeyline credible and persuasive. As he learned to speak increasingly from the heart of his inner convictions, his self-awareness and self-confidence increased. Added confidence engendered the beginning of a larger story, one where he would take more risk and engage others, particularly the board members, in his quest. Gradually, almost imperceptibly, the MFH story was rising to a higher plane.*

Board members, inspired by Tim's newfound and far more *powerful personal story, and responding to his quiet call to action, expressed an increasing desire to join the story as participants rather than mere observers or advisors. The engagement of the board enlarged the MFH story further, contributing new ideas and creating new possibilities. Collectively, the group began to think: "We can raise more money, go to more places, reach more children, fund full-time employees to assist Tim, help our health-care providers become self-sustaining, and break new ground in this industry." These stories of "who we are" have spawned a new organisation—one with greater dreams, a larger vision and a deeper purpose. Already, in 2003, MFH had raised more money, funded more health-care sites, hired more employees, and engendered more commitment from partners—employees, board members, healthcare providers, and donors—than Tim had ever imagined.*

By June 4, 2004, when Tim made his "state of the organisation" speech to the Board of Directors, everyone felt part of a remarkable story, and I understood to what extent it was indeed a co-creation. At my suggestion, Tim crafted his remarks around a concept that

I characterize as a "past, present, future" theme. With vivid images, he sketched out where we have come from and where we can go: "Here is what I saw in 1998; here is where we are and what we've accomplished as of today; here is where I see us going in the next few years." As Tim spoke, we were humbled by his presence and the force of his message: "In 1998, I was energized by the exciting possibility that MFH could have even a small impact in the greater world of humanitarian activity. Today, we have accomplished much. Tomorrow, with the help of you and our partners, we can have a major impact on worldwide child mortality and health care." As Tim called others to action, again and on a higher plane than previously, I was struck by the fact that he was simultaneously calling upon himself to see and tell a bigger story. As he continues to create the story, the story continues to create him—and a greater MFH with a larger mission.

Tim's ability to portray a dream and to bring the board members, as well as his other collaborators, into his story as protagonists has been a crucial element of MFH's success, and it is proof that people who come to see themselves as part of the story will provide momentum and enthusiasm to the company's endeavours. As people began to see themselves in the story, rather than simply see Tim's story, the organisation was able to rise to new levels of achievement. In their discussion of strategic stories, Shaw et al. explain this phenomenon in straightforward terms: "When people can locate themselves in the story," the authors say, "their sense of commitment and involvement is enhanced." (Shaw et al., 1998a p. 50) Today, the MFH story is part reality and still part dream, but Tim and MFH are on the road to creating a future where his organisation will indeed have a significant impact on worldwide child mortality. As Tim expressed to me in December 2004, "we have to get good at the things we say we see in our future. The challenge is that we have to grow into our new story."

Illustration 6: ***MARTIN LUTHER KING ENGAGES THE FOLLOWERS (Historical illustration)***

> When one examines accounts of Martin Luther King's leadership, in particular Gardner's informative and inspirational chapter (Gardner and Laskin, 1995 pp. 203-221), one gets the clear sense of a symbiotic relationship between the storyteller and his emerging story. Gardner writes that King, by his own admission, originally had little desire to lead. At least in part, a story grew around him and thrust the leadership role upon him. (Gardner and Laskin, 1995 p. 210)

A skilled orator who found a powerful voice, King's "who I am" story was nonetheless partially crafted through rhetorical happenstance. In other words, the story was creating him as he created the story. For example, biographer Taylor Branch recounts King's landmark speech to those involved in the Montgomery Boycott in December 1955, the speech that signalled his emergence as a national personality, the one that "made him forever a public figure". He did not have time to prepare his remarks, and thus he spoke from the heart, of his deepest convictions, rather than from a polished and practiced text. (Branch, 1989 pp. 141-2) When his remarks were indeed well received in this tense situation of political drama, and by the largest crowd he had ever faced, King gained the self-confidence to personalize his message, rendering his discourse far more powerful. Reflecting on this incident, he would later recall: "I came to see for the first time what the older [preachers] meant when they said, 'Open your mouth and God will speak for you.'" (Miroff, 1993 p. 312)

Whether or not one believes God was speaking for him, King was experiencing the power of finding his inner voice, telling his story, and letting the story itself work its magic of co-creation. Again, as I explain to the leaders I coach, the lesson of Tim Bilodeau or Martin Luther King is about the power of finding your voice and telling your story: Launch yourself into the process of self-knowledge and self-expression. Begin to articulate your own story. If you do the deep thinking that leads to authentic, relevant and credible themes that truly matter to you, speak out around these themes. As you find your voice, you are creating your leadership story, and the story will simultaneously create you.

Even King's celebrated "I have a dream" theme, originally articulated at the March on Washington of August 28, 1963, was somewhat of a serendipitous accident, a deviation from his prepared comments, a principle discovered in a moment of oratory inspiration that he would later merge into his fundamental story of identity. As Gardner relates, "only toward the end of the formal remarks did he begin to deviate from the script and hit his stride. Finding his voice, which had first broken into public spontaneously in Montgomery eight years before and was now familiar to every American who watched the nightly news, King told the world 'I have a dream.' The dream was 'deeply rooted in the American dream', and it drew from the Bible and the words of the prophets to touch people in all regions of the country." (Gardner and Laskin, 1995 p. 215) For me, once again, the remarkable phenomenon is the extent to which the "I have a dream" story, created spontaneously by King, is creating him as well. In essence, he deviates from the script and watches a new story unfold. He finds his voice around the new theme. His repetitive use of "I have a dream" was not planned; it was rather the rhetorical "happenstance" of an inspired instant. Subsequently, he consciously integrated the co-created "dream" element into his leadership storyline.

By forging a dream "deeply rooted in the American dream", an inclusionary dream, a story of a future where all Americans live in harmony, King encouraged the followers to dream along side him, to enter the story as protagonists. His message became a powerful call to action, albeit an

indirect one, asking followers to join in his vision.

I often use Martin Luther King to "review" my core concepts with clients, as his discourse clearly illustrates several of the basic principles of effective storytelling by a leader. First, it is firmly rooted in his personal experience. Second, it is inclusive, presenting a vision for all. It is not about King's individual dream but rather a collective dream, a dream that includes blacks and even non-blacks, in an America where all people would live in harmony and mutual respect. Indeed, Gardner notes that in his speaking and storytelling King was careful to draw on multiple cultural and religious sources, in order to appeal to a wide audience: "King embraced a broad inclusionary vision that was friendly to a variety of intellectual and cultural strands. He was comfortable with ideas and individuals from the Islamic, Catholic, Jewish, and Eastern religious traditions. At this time, Gandhi was the greatest religious influence on him." (Gardner and Laskin, 1995 p. 209) Third, his discourse constitutes a call to action that ignites a story in the listener's mind, a story which engages the follower, where the listener comes to see himself as a protagonist who wants to emulate the leader and join in the quest. King used vivid imagery to transform the people's story from the passive, negative "we have been oppressed" to the active, positive "our future can be different if we have the courage to dream." Fourth, and above all, he succeeds at enlarging the perspective of his followers, indeed of an entire nation

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4.8.6 Stories create leaders as much as leaders create stories.

In a similar vein, stories create organisations as much as organisations create stories. I think of leadership storytelling as a powerful form of symbiotic co-creation—a co-production of the leader, the followers, and the stories of identity. When a leader offers his followers a true sense of inclusion, the followers become active participants in co-creating the group's, and the leader's, stories of identity. When it all works well, the leader, the stories, and the group are lifted to new heights.

When followers voluntarily enter the story, when they come to see themselves as participants capable of enacting a drama, dreams begin to become reality. Paul Dolan of Fetzer writes that we cannot predict the future, but we can create it. (Dolan, 2003) In my view, it simply makes more sense, for a leader and an organisation, to create the future, rather than to try to predict and then adapt to it. A well-crafted and authentic future story puts a company, a workgroup, or any team unit on the road to creating its own future. At

Fetzer, Dolan crafted a future story of sustainable growth and environmental responsibility. He told the story to the organisation, listened to employees, and together they co-created a better future, first in their minds. They dreamt it together, and then they created the story in reality by acting it out every day. As they were creating the story, the story was creating them.

The January 2003 board meeting at MFH provided a simple example of this three-way co-creation—where leader, followers, and story rise to a new level. As an exercise, Tim had asked each director to prepare and tell a personal story, in the context of "catching up with an old friend at a party, telling him about your MFH involvement." Tim began the exercise with his best storytelling performance to date, and the others followed right along with moving tales of their reasons for participating in MFH. After the meeting, Tim was expansive in his enthusiasm, as he commented to me: "That storytelling exercise was a great event! It was reinforcing for me to hear other people talk about MFH and to feel their passion and ownership, independent of me. It was helpful for the board member to think about issues of commitment, about stepping up and taking ownership. The process of telling the story expanded the game. It was really valuable for the organisation, because it was a public commitment, almost a vow to step up and take it to the next level." (January 13, 2003)

From my perspective, this was truly a case of symbiotic co-creation—where a group defines a story and that story, in turn, redefines the group. In my coaching work, I have seen this collective phenomenon work its magic numerous times: When group members tell their stories with passion, perhaps even with a dose of overstatement or exaggeration, their enthusiasm spreads to others, and the shared story grows. When the group decides to step up and truly live out the story, it can become a self-fulfilling prophecy.

4.8.7 Storytelling, leadership, and theatre

The notion of creating a story and then turning it into reality is closely connected to the concept, prevalent among some scholars, that organisations are a stage—and leadership a form of theatre. (Weick, 1993, 1998, Stone, 2003) In this view, an organisation becomes an arena where the protagonists of the business (or non-profit) world execute their heroic, tragic or comic acts. Leaders' future stories provide the scripts, the scenarios for creating the unfolding drama. (Mangham, 1995) Boje (1989, 1999c,b 2000a), as well, sees leadership as closely connected to theatrics, with organisational storytelling as the script

for determining the players' enactment of the drama.

Concepts and imagery from the theatre—stories, scripts, scenarios, actors on stage—have frequently been used in reference to leadership and control in organisations. (Mangham and Overington, 1987) Sederberg writes that organisations have "scripts" that provide actors with a sense of what behaviours are acceptable and encouraged. (Sederberg, 1984) Kanter refers to organisations as stages where theatrical events play out. (Kanter, 2002) Wilkins states that leaders' stories are "crucial for the successful participation of organisational actors." (Wilkins, 1983 p. 82), and Wilkins and Ouchi provide several examples of stories guiding behaviour on the "improvisational stage" of business (Wilkins and Ouchi, 1983). Benford and Hunt use terms such as scripting, scene, actors, and expected behaviours in a dramaturgical study of leadership, power and social movements. (Benford and Hunt, 1992)

Gardner (1992), and Gardner and Avolio (1998), make a connection between impression management (a form of storytelling), "organisational dramaturgy", and charismatic leadership. Harvey (2001) cites the work of Gardner and Avolio, and she concurs that leaders will typically cast themselves as protagonists in a dramatic play, with followers cast as "allies in pursuit of the charismatic leaders' vision" (Gardner and Avolio 1998, p. 42). While Tichy does not allude directly to organisations as stages or theatres, his language is nonetheless replete with theatrical reference, as he repeatedly uses terms such as protagonists, scenarios, roles, and unfolding dramas. (Tichy and Cohen, 1997 p. 172)

4.8.8 Maintain a sense of ritual; sustain the tribal campfires

It is never enough to craft and begin to tell stories of identity; we must keep the stories and the storytelling alive, and this takes a good deal of attention and hard work. Perhaps the most common failing I have seen in the individuals I have coached is the reduction or cessation of storytelling activity, at the point when the leaders begin to feel that the organisation "understands". If there is one thing I have learned in working with leaders to help them communicate through storytelling, it is that stories of identity must be continuously retold and updated. As organisations are dynamic, so must be their stories.

Vibrant companies use ritual to create the times and places for storytelling. Ritual events

may be formal or informal, planned or *ad hoc*, but leaders should actively build them into the fabric of the company. Numerous business people, journalists, and scholars echo this sentiment. Telfizian writes that it is not only the creation of stories, but the ritual of telling them that is important to the life of an organisation, as ritual events tend to unite employees around common goals and values. (Telfizian, 2001) Gabriel makes a conscious connection between story and ritual, as both "may be treated as manifestations of shared belief systems." (Gabriel, 1998 p. 138) Simmons espouses the concept that the stories told and retold in any organisation will define its principles, standards, and behaviour better than any list of regulations, procedures, or guidelines. (Simmons, 2001 p. 222) In fact, companies such as Armstrong Furniture and PSS are so taken with telling stories as a method for sharing and passing on values that they have abandoned policy manuals and work rules altogether. (Armstrong, 1992, Weil, 1998)

Some of my favourite ritual and storytelling images come from Neuhauser, who calls leaders "keepers of the tribal campfires", writes of group bonding and sharing "sacred bundles", and tells us why ritual is critical to an organisation's health and prosperity.(Neuhauser, 1993a p. 51) O'Reilly and Pfeffer are of the same mind concerning the importance of story and of ritual, asserting that every successful organisation "has its unique rituals, stories, and practices that make its values and beliefs real." (O'Reilly and Pfeffer, 2000 p. 143) Pottruck and Pearce advocate active myth building using a group's emblematic hero stories reinforced with image reinforced with image and ritual. (Pottruck and Pearce, 2000a p. 29)

Illustration 7: ***PHIL JACKSON AND THE BULLS' .TRIBAL CAMPFIRE (Historical illustration)***

> In order to reinforce the feeling of a collective, meaningful and sacred quest, Coach Jackson created a campfire atmosphere in the team's meeting room, a unique place of symbol and story where group members reflected and bonded. He describes this remarkable room in the most dramatic and emotional of terms, leaving the reader with a clear picture of its sacrosanct character: "The team room at the Sheri L. Berto Center is the perfect setting for an epiphany. It's the inner sanctum of the Chicago Bulls—a sacred space adorned with Native American totems and other symbolic objects I've collected over the years. On one wall hangs a wooden arrow with a tobacco pouch tied to it—the Lakota Sioux symbol of prayer—and on another a bear claw necklace, which, I'm told, conveys power and wisdom upon its beholder. The room also contains the middle feather of an owl (for balance

and harmony); a painting that tells the story of the great mystical warrior, Crazy Horse; and photos of a white buffalo calf born in Wisconsin. To the Sioux, the white buffalo is the most sacred of animals, a symbol of prosperity and good fortune...I had the room decorated this way to reinforce in the players' minds that our journey together each year, from the start of training camp to the last whistle in the playoffs, is a sacred quest. This is our holy sanctuary, the place where the players come together and prepare our hearts and minds for battle, hidden from the probing eyes of the media and the harsh realities of the outside world. This is the room where the spirit of the team takes form." (Jackson and Delehanty, 1995 pp. 11-12)

In this team room, he succeeds in establishing a sacred atmosphere of ceremony, creating a private place where team members rehearse their stories of identity and of group bonding. His description of the team meeting room gives us the genuine feel of a ceremonial tribal campfire. Himself a deep thinker influenced by diverse cultures and philosophies, Native American and Zen Buddhist for example, Jackson has co-created with his team a "who we are" story quite consistent with his "who I am" story. We have a unique identity; we are different, and we are more than basketball players! We are deep thinkers and holy crusaders who come together in a sacred place to prepare our hearts and minds for the righteous quest, a task with a purpose that transcends sport. We come together to do something far more important than play a game. Our bond and our deep commitment make us exceptional in a modern sports world dominated by attitudes of super-sized egos, glamour, and self-interest.

The Chicago Bulls' example demonstrates the importance of the leader's supporting and maintaining a group's stories of collective identity with ritual, image and symbol. In addition, we are reminded that storytelling as a tool to lead a group and build its culture requires a good deal of hard work and attention to detail. As Pottruck and Pearce emphasize: "Culture is nothing, and I mean nothing, without daily reinforcement... [Sustaining it takes] a great deal of attention to detail and a great deal of faith in its importance. It takes concentrated effort." (Pottruck and Pearce, 2000a p. 30)

4.8.9 Enlist the followers as active storytellers

The most effective stories take on a life of their own, spreading through an organisation, repeating and self-propagating. As Walton points out, their impact can go on and on: "The penultimate power of strategic stories is that their impact is never-ending. They effortlessly replay themselves, generating buy-in for days, years, even decades to come." (Walton, 2004 p. 16) Neuhauser adds that an organisation's stories are all the more

convincing if multiple voices create "a shared vision of the future through storytelling. The people in an organisation all have to tell stories with a shared message and theme." (Neuhauser, 1993a pp. 122-3) For Denning, the proliferation of an organisation's stories is so central to its character that, when a leader or other group member tells a story of identity, "the important story is not so much the story being told, but the one triggered in the mind of the listener." (Sadowsky, 2001a) In other words, the key notion is that leaders' stories of identity should engage the listener and generate a new story, told in turn from the perspective of the listener. Thus, an organisation's stories are told and retold from various points of view. New stories, consistent with the overall organisational themes, are created as individuals participate in the co-creation process and offer their own personalized versions of the corporate stories of identity.

When Anne Mulcahy was named president of Xerox Corp in May 2000, and CEO one year later, the business was in serious trouble. The turnaround she stimulated at the giant company is a striking example of story co-creation. Interviewed in *Fast Company* in 2005, she described how she navigated through the early days of uncertainty, by encouraging Xerox people to write a new corporate story with her: "I got great advice: Write a story. We wrote a *Wall Street Journal* article, because they had been particularly nasty about us, dated five years out. It was about where we could be if we really stood up to the plate. And people loved it. No matter where I go, people pull that article out. They personalized it... Storytelling is hugely important. At our town meetings, the most frequently asked question wasn't whether we'd survive, but what we would look like when we did." (Hammonds, 2005 p. 96) In essence, Mulcahy tapped into the power of the storytelling and story-sharing phenomenon. A new corporate identity emerged at Xerox because she got the employees to co-create the future story, to buy in to it, and to take ownership of it.

Cohen and Prusak underscore the deep engagement that takes place when a listener comes to understand a plot and his potential role in it. (Cohen and Prusak, 2001 p. 117) As a listener recreates and adapts an organisational story in his own mind, the story becomes part of his own identity. As a group comes to share and tell individual stories of identity that reflect common themes and examples, group alignment often increased dramatically. (Pfeffer and Sutton, 2000) When individuals interpret the stories and adapt them to their personal contexts, collective and individual ideas, behaviours, and discourse are in concert. Denning explains this phenomenon, stating that an effective story of identity makes its way into the collective consciousness of the organisation, producing a unified vision in the

minds of the listeners. (Denning, 2002b)

In terms of enlisting his followers as active storytellers, Tim Bilodeau's pivotal moment came in June 2003. Tim had proposed that, in anticipation of the quarterly meeting, board members reflect on their past experiences and prepare autobiographical stories that would explain some of the reasons for their involvement with MFH. As individuals told their own stories, commitments were renewed, the group deepened its knowledge of one another, and the engagement of the board rose to a new level.

Tim then challenged the board to co-write with him a new organisational tale and vision, one where active board members would visit sites and become spokespeople for specific locations or ventures. When they understood the new plot line and their role in it—a new story in which they would travel to see MFH's activities in the field, become champions for site initiatives and organise specific fundraising activities—they began to propose their own projects, and to dream of building an organisation with wider reach. In a sense, MFH's leader had succeeded at turning his advisors into protagonists and, in some cases, even heroes.

As we have seen, Tim recognized early in the organisation's history that board members were the key constituency for extending the reach of MFH. He brought them in through the "ritual" of telling their personal stories. Not only were the individuals in the room moved by each others anecdotes, new ideas were also stimulated. In the ensuing months, I observed that board members had taken elements—concepts and terminology—from each other's stories and brought them into their own discourse. A collective story and a common language were emerging!

Commenting on the June 2003 meeting, MFH legal counsel Tom Bilodeau, nephew of Tim, described the board's increased sense of engagement, as a direct result of the "tribal storytelling" gathering: "We took possession of the MFH mission. The key step was getting us to think of and tell our personal reasons why MFH was important to us. I can truly speak for the entire board in saying that it was an inspiring moment. Finding the experiences in our past that explain why we get satisfaction from our involvement with this organisation helped us see ourselves and each other with a new depth. I thought that taking the time to tell our stories to each other was a true turning point." (Personal conversation July 29, 2003) Thus, the fundamental dynamic of engaging others in

personalizing and spreading the organisational story, a dynamic that Tim was coming to understand and use so effectively, was filtering down the organisation.

4.9 STORIES AND AUTHENTICITY: EMBODYING THE STORY

I often caution my clients that storytelling is not a panacea. In fact, if our stories are not authentic, if we cannot embody our stories and live them completely, it is probably better not to tell them at all. An unauthentic story will undermine credibility, lead to cynicism among the followers, and generate negative counter-stories throughout the organisation. (George and Bennis, 2003 p. 38)

Authenticity comes from "walking the talk", from absolutely no gap existing between the leader's words and actions. So, we make sure we are not only living our stories, but embodying them in *visible* ways. If a leader is not living the stories, and if others do not see the leader living them, the leader will lose the trust of the followers. (Maxwell, 1993 p. 36, Abrashoff, 2003 p. 42)

Bill Marriott, Jr. provides a marvellous example of an authentic leader who embodies his story, and his company's—a story of attention to detail and remarkable customer service—in large ways and small. He is a constant teacher and reinforcer of the Marriott values, visibly living the story for the world to see: "He flies more than 200,000 miles every year to visit his many operations and to carry the Marriott message visibly and personally to as many people as he can. He stops by hotels unannounced and chats with everyone he sees. He shows up in the Marriott kitchens at daybreak to make sure the pancakes are being cooked properly." (Ford et al., 2001 p. 54) Thus, when he speaks out about the company's commitment to its employees, or to its obsession with hotel operations and service quality, his story is authentic and credible.

In both the academic and the business literature, numerous sources point out a similar concept: If a leader cannot model the behaviour he advocates in his stories, if his words and his actions do not match, he will not be credible, and followers will lose faith.

(Gardner and Laskin, 1995 p. 293, Kouzes and Posner, 1993 p. 217, Jones et al., 2004, Tichy and Cohen, 1997 p. 174) British futurist and business guru Charles Handy says that authenticity must come from the deepest parts of an individual, that the authentic leader must always act consistently with his own convictions: (Handy, 1990 p. 135)

"The first key to greatness," Socrates reminds us, "is to be in reality what we appear to be." (Maxwell, 1993 p. 36) At Apple computer in the 1980s, Steve Jobs was entirely credible, since the story he told was reflected in his own values and behaviour. Jobs inspired the Macintosh team by telling a motivational story—that they were underdogs taking on not only competitors but the nonbelievers at Apple as well. They were the rebels. He raised the pirate flag outside their building, and he challenged them to put a dent in the universe. The stories and the challenges became all the more inspirational because the team saw its leader living the reality he described in his everyday actions. (Cringely, 1993) He was, in reality, exactly what he appeared to be, and what he asked others to be through his stories—the pirate, the rebel, the heroic underdog who could succeed against all odds, and change the world.

When a leader fails to embody the organisational story, employees are rarely fooled. As Gardner points out, "Just as one can ask whether a story is true, one can ask whether an individual truly embodies what she speaks about...The individual who does not embody her messages will eventually be found out." (Gardner and Laskin, 1995 p. 293) We see an example of this failure to live the company story in Wilkins' description of a Fortune 500 company where employees reported that, although the president claimed to be pursuing innovation as his key theme, his story was not credible. (Wilkins, 1984) In fact, a 1980 study by Tom Peters at the same company revealed that only five percent of the president's day was spent in areas related to innovation. (Peters and Waterman, 1980)

When we watch Tim Bilodeau on the Medicines for Humanity website, speaking to us on video from Quisqueya in the Dominican Republic, everyone associated with the organisation sees in him an authentic leader who lives his stories with passion. As he looks around him at the extreme poverty and malnutrition, at the children playing in the worst of unsanitary conditions, and declares: "This is where there is high child mortality. This is where we belong", everyone who knows him understands that these are more than words. He sets a constant example—not only sending medicine and aid, but travelling frequently to the sites himself, and urging employees, board members, donors, current and

potential partners to travel with him and experience the work of MFH "live".

4.10 PRACTICE, REPETITION, AND ONGOING EXPLORATION

For the most effective leaders, learning and self-discovery are an ongoing, lifelong journey. In the past few years, I have come to see three fundamental reasons why constant practice and exploration are critical: (1) mastering the art of influence through storytelling is hard work; (2) practice, repetition and probing will cause both the leader and the stories to grow; (3) effective leaders repeat their stories relentlessly!

4.10.1 Repetition and practice because storytelling is hard work

We should never forget that inspirational communication is challenging! Learning to lead in inspirational ways, to use storytelling to galvanize and motivate, is an ongoing learning process, and a proficiency that must be honed constantly, much like any professional, musical, or athletic skill. As Ready puts it, storytelling is "hard work" and "labour intensive". (Ready, 2002 p. 65) While story may be our most powerful tools of persuasion, McKee echoes the view that learning to tell our stories effectively is a difficult and time-intensive undertaking. (McKee, 2003 p. 6) Ibarra and Lineback stress that there is simply no substitute for live practice, over and over. (Ibarra and Lineback, 2005 p. 71)

Mastery of storytelling will take hard work, attention to detail, and perseverance. As Leonard explains, the mastery of any complex activity is more about determination than talent, more about practicing than about exploiting a natural gift: "Mastery isn't reserved for the super talented or even for those who are fortunate enough to have gotten an early start. It is available to anyone who is willing to get on the path and stay on it." (Leonard, 1991 p. 5) George encourages anyone who strives to influence others to begin with authenticity, to engage fully in the long journey to deep self-knowledge and self-expression: "How do you become an authentic leader? In my experience it takes many years of personal development,

experience, and just plain hard work." (George and Bennis, 2003 p. 27)

Since learning to craft, mould and tell our stories is an iterative process, we learn by doing. Individuals who practice and repeat their storytelling will often recount that this repetition has the two-fold effect of making them more effective story tellers and increasing their appreciation of the power of a good story as a motivational tool. For example, Robert Metcalfe, who founded 3Com Corp., recalls the unexpected benefits of telling his start-up's story to venture capitalists. Metcalfe says he told the story "1000 times in 997 different ways", refining it each time. That process deepened his appreciation of why he created the company to begin with; it also gave him sensitivity to the power of story-telling. Long after securing financing, at a time when his company employed thousands of people, Metcalfe made a point of meeting with small groups of employees every Friday morning, "regaling them with company lore". (Welles, 1996)

While Tim Bilodeau worked diligently at the entire storytelling process, and eventually found a natural and inspiring voice around numerous of his core stories, his road to feeling comfortable telling his stories was a somewhat long and laborious one, lasting nearly four years to this point (as I write this in December 2005). Tim's perseverance was exemplary, as he wrote and practiced version after version in the three-year period from February 2002 to December 2005. As I review his steady evolution over the past few years, I am struck by the contrast between the hesitating tone of his first presentations—insipid PowerPoint data dumps, or colourless stories told in a monotone and unsteady voice, and in the third person—and the powerful resonance of his moving, story-based speeches of late 2004. At present, he is at ease in most contexts, taking over the space with his message, telling his stories from the heart, without notes, and in his natural voice. The consistent practice of the past three years has resulted in a quiet self-confidence that has transformed his speaking persona. As he describes it: "When I made presentations before, I was unsure how I was going to connect with the audience and engage them. Now, I always feel that whenever I begin to tell a story, people will listen and be moved." (January 8, 2005) Most important, he continues to work at his craft and improve as a storyteller. He has truly become an inspirational speaker, on the (lifelong) road to mastery!

In late 2004, when Tim addressed students of the Roxbury Latin School, his alma mater *near Boston, one of the individuals he impressed deeply was Joseph Kerner, Chairman of*

the English Department. Kerner, whose tenure as chairman began in 1976, is a long-time observer of speakers with a local reputation as a sharp critic of speaking technique. Thus, his remark that Tim had exhibited "the most natural speaking style I have ever heard" was particularly gratifying to both the speaker and the coach! This natural style comes in part from his authenticity, from an inner comfort that he is truly embodying his story, but it comes also from the hours of practice he has done. Practicing until he didn't need any more notes, until his stories began to flow naturally in any context because he simply speaks from the heart about things he cares about—all this took something more than authenticity and conviction. Looking back, we understand that it had taken a lot of repetition as well.

Today, Tim and I joke as we reflect on his early efforts from 2002, when his style certainly could not be termed "natural" at all. Videotapes from the period are strikingly unnatural in style; in his concern about making transitions between his stories, or his anxiousness about leaving out a central theme, Tim would often lose his train of thought as we practiced. Three years of speaking and practicing have removed all fear and uncertainty. Today, when he speaks, one senses that he is not conscious of himself at all. Only the message matters, and it comes through loud and clear in his stories.

In Tim's mind, the Roxbury Latin speech represents a true turning point in his development as a speaker. As he tells it, this was the first time he felt truly comfortable addressing an audience without any notes or slides. He termed this moment "liberating", saying, "It felt so great to just stand up and let my stories flow; I should have done it a long time ago, but it took a long time to develop the confidence to do it." (December 24, 2004)

4.10.2 Practice, reflection, and repetition fuel growth—of the story and the teller

Leaders maintain their vitality and passion through continuous self-exploration, processing of new experiences, questioning, and probing. They often craft new stories, and revisit old ones for inspiration. (Bennis and Thomas, 2002a, Bennis and Thomas, 2002b, Keen and Fox, 1973 p. xv, Tichy and Cohen, 1997 p. 216) For Pearce, authenticity arises out of the discipline to engage in a cycle of self-discovery and self-expression that "seems to be a

lifetime process (emphasis mine), even for spiritual teachers who practice authenticity as a life's work and who spend much of their lives in solitude." (Pearce, 1995 p. 24)

With every leader I coach, one of my primary goals is to set in motion two ongoing and repeating practices: (1) we constantly rehearse our stories of identity, and (2) we return frequently to the internal voyage of self-discovery. Of course, we practice telling our current stories, with the diligence and perseverance described above, to perfect our delivery and increase our comfort level in front of an audience. However, there is another, perhaps deeper, reason that practice is essential: Time and again, I have watched practice and repetition generate greater clarity and deeper understanding of the leader's own core beliefs and messages.

In addition, there is a certain synergy between the two types of repetition we are discussing, repeated self-examination and repeated articulation of the stories. Repeating the message is important as a reinforcing device for the speaker as well as for the audience; with each telling of a story, the leader hears his own messages again, and his core themes are reiterated, and thus strengthened, in his mind. Pearce writes that this phenomenon of hearing the story along with the listeners is of great benefit to the storyteller, as the speaker revisits and reinforces the central themes in his own mind. (Pearce, 1995 p. 69)

I saw this phenomenon of synergy—the growth that comes with repeated self-examination and repeated telling of one's personal stories—at work with Tim during the period from November 2002 to February 2003. By November 2002, Tim had uncovered and written some moving stories of purpose from his own life experience, but he was unaccustomed incorporating the stories into his speaking, and thus his delivery of the underlying messages was weak. He needed to work intensively on articulating his stories, and the core principles they illustrate, to others. I advised him to practice, diligently and intently—with whomever he could get to listen—family, friends, colleagues in his building—anyone he could hold "captive" for 5 minutes. Since I was spending significant amounts of time in the Boston area during these months, we were also able to schedule 6 face-to-face coaching sessions. Tim told his stories over and over, to the point where some people close to him complained (I believe in jest!) that all this repeated storytelling was becoming tiresome.

These months turned out to be a time of swift development of Tim's storytelling ability; with practice and repetition came a clarity and confidence I had not seen in him before.

Tim grew far better at telling many of his stories—simply by practicing them, over and over. In addition, I was noticing the effect of repetition on the storyteller. Clarity was emerging in Tim's discourse, not because of improved technique, but rather because of the reinforcement that came from consistent practice. Each time he practiced a story, he was revisiting one of his core beliefs again in his own mind. As he became increasingly comfortable telling his stories, Tim was finding his natural voice, and a truly inspiring storyline was emerging. By virtue of his will and perseverance, the messages, the values, and the core beliefs—who he is and what he stands for—grew increasingly lucid and cogent, not only to his listeners, but also (and perhaps more importantly!) to himself.

In Tim's case, his personal stories were not only becoming clearer and more meaningful to him, MFH's story was growing in size and scope as well. As he combined the conviction and emotion of the stories of identity from his past with some remarkable new stories from his site visits, he began to see a larger role and mission for MFH. As he recalls: "The entire process, first the recollection and reflection on my experience and my life, then practicing the telling of my stories, was amazingly re-motivating. We don't often question, in daily life, why we do what we do and where our beliefs come from. If we like what we are doing, there is a tendency to just keep doing more of the same. That's basically where I was. I knew I was doing good things, and I thought I would keep doing them. Reconnecting with the key events and people from my past, bringing back the emotion that I felt at the time, I felt bigger things inside of me, and I started seeing bigger things for myself and MFH. As I told my stories, and as I added new stories from my current site visits, the MFH story expanded. I realized we didn't have to just do more of the same; we could see bigger, and do more, have a greater impact in the world...You get back your motivation through the power of recollection, through the addition of new experiences, and through telling the stories." (December 2004)

When Tim and I entered into a coaching relationship in early 2002, I thought my role would be the one I most often perform when I consult with an individual: helping a leader to express his core beliefs, and thus to present himself and his ideas more effectively. In most cases, my primary objective is to demonstrate that telling inspirational stories from one's life experience has a far greater impact on an audience than facts and figures, rational arguments, or slide presentations. During the November 2002—February 2003 period, as I watched Tim begin to tell persuasive stories, I was reminded that the impact of this coaching technique stretches far beyond teaching the use of storytelling to enhance a

presentation. When one of my coaching undertakings is truly successful, the most important transformation is not on the leader's presentations, but rather on the leader. As the stories of identity come clearly into focus, the telling of these stories becomes a constant revisiting and strengthening of the individual's core beliefs. As a powerful and authentic voice emerges, the leader often comes to see a larger arena and a greater purpose. In dramatic cases like Tim's, they actually call upon themselves to live larger, as the stories they tell extend their horizons and raise their level of ambition.

4.10.3 Repetition and practice because we can never tell our stories enough

When asked what he had learned in his tenure as dean of Tuck School of Business at Dartmouth, Paul Danos replied that one of the most important lessons was that "progress cannot happen without a good narrative". He added that the narrative must be emphasized repeatedly, "so that the message becomes part of the conversation." (Canabou, 2003 p. 55) Thus, we repeat and practice our stories for our own self-discovery and to become better storytellers, but we also repeat them for the benefit of those around us. In most of the organisations with which I have consulted, leaders and managers have tended to underutilize storytelling, to fail to repeat the narrative frequently enough. Most often they stop telling their stories of identity, of purpose, or of change because they think the organisation has "heard it enough". One of my most crucial roles as a coach is to remind the leader that telling the core stories of identity and purpose—of both the leader and the organisation—must become a boundless, never-ending endeavour.

Experts in leadership communication (Kotter and Cohen, 2002 p. 4, Pearce, 1995 p. 27, Walton, 2004 p. 90) warn of the tendency of most leaders to undercommunicate. Effective leaders understand that relentless repetition of one's core stories is necessary to put messages across to the listeners. In his autobiographical account of effecting change at GE, Welch's descriptions show not only that he used storytelling extensively to lead the company in new directions, but also that he repeated his stories and their central lessons *relentlessly*. (Welch and Byrne, 2001 p. 104) Welch understood that generating group buy-in for behavioural change requires tireless repetition of the story.

As we observed in 4.8.9, the telling and repeating of stories can be an effective tool at the group level as well. Engaging others in the storytelling—in particular through conscious and systematic exercises of repetition—can renew a team in the same way that practicing stories of identity can reinvigorate a leader. Thus, in June 2003, when Tim asked each board member to prepare a personal story of his involvement with MFH, the effect was to create a "tribal campfire" atmosphere, even in the somewhat challenging setting of a formal board meeting. Every member told a moving story, consistent with the values and beliefs of the company and its leader. In Tim's emailed reaction, which I quote below, one sees not only his commitment to storytelling, but also his understanding of two important principles that energize an organisation: engagement of the followers as storytellers, and repetition of stories of collective identity.

Illustration 8: *EXCERPTS FROM TIM'S EMAIL TO THE BOARD ON JUNE 20, 2003*

> Our last meeting is still "with me". To hear the stories of why our Board Members are involved with MFH was moving to me. The sense of real commitment was tangible... and it re-enforced my commitment.
>
> Thanks to all of you at that Board Meeting, and a special thanks to Coach Sadowsky who guided the session, and who has helped me make my MFH story come alive.
>
> I really did learn a great deal from listening to other Board Members talk about the organisation... and the direct comments to me on my story were also helpful, indeed!
>
> I would like to recommend that we set aside 20 minutes in this year's Board Meetings for members to share "successes" or "failures" in relating the MFH story to others... what worked and what didn't... and for feedback. Connecting with others is the key to our ability to carry out our larger mission...and telling our story effectively is our best tool. I think this would be a most important segment of each meeting.

The reaction of board members to this meeting was equally positive. In a casual conversation some months after the pivotal June meeting, Patrick Wadden made the following (unsolicited) comment: "Wow! Looking back, that whole thing was fantastic. Hearing everyone talk about their reasons for being here was incredibly moving. And, I really came to understand that we connect with other people through our own stories, as Tim has done with us...The meeting was a great demonstration of that concept. I realized that there is a shared story at MFH, and a collection of individual stories as well." (Personal communication September 8, 2003) Such feedback from board members proved

to Tim and me that our storytelling efforts were generating results. The volunteer board was indeed rising to new levels of involvement, taking ownership of the entire MFH project.

4.11 WRITING "AS SPOKEN"

Periodically, during our ongoing voyage of self-discovery and self-expression, I make sure to revive our emphasis on the practice of writing. I have found that one extremely effective way to reinvigorate the exercise of writing is to change the focus somewhat. Using "writing as spoken", we begin to use writing as a tool for self-expression.

In explaining my belief in this type of writing as a means of finding and strengthening one's leadership voice, I can cite numerous testimonials from current and former clients for whom the exercise of writing in spoken form has proven a key element of their progress. For example, Eric Le Royer points to "writing as spoken" as a breakthrough exercise that helped increase his confidence. (Personal communication by email June 11, 2004) Writing in one's spoken voice often leads to breakthroughs because it constitutes a critical transitional step between self-understanding and self-expression, between finding one's stories and learning to articulate them. In writing this way, the leader reflects deeply on the message, imagines the context, and visualizes the delivery.

4.11.1 Helping Tim Bilodeau find his voice

I discovered the exercise of writing as spoken in late 2002, and it was an outgrowth of my frustration and a sense of my own failure with Tim during the period from February to November 2002. Throughout these months, Tim worked diligently at introspection, reconnecting with his core beliefs and finding compelling stories that symbolized them. By early 2002, he had powerful stories to tell, but the delivery of these stories remained colourless and uninspiring.

My frustration stemmed from the simple fact that his writing and his private conversations,

including those with me, were eloquent and passionate. In his more public exchanges and formal presentations, his natural voice and passion were not finding their way into his discourse. My notes from November 2002 address this inability to connect naturally with an audience, and my struggle to find a way to help

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Illustration 9: *MY COACHING COMMENTS FROM NOVEMBER 2002*

> Tim's introspection and attentiveness to the journeyline exercise have been remarkable, leading to true lucidity about who he is, what he stands for, and the impact he would like to make on the world around him. He has reconnected with his core beliefs and found powerful stories that portray them. But, although these ideas are clear to him, he seems unable to deliver them with authority and impact to his listeners in a formal setting. He seems to find interacting with an audience intimidating. He relies heavily on notes, and his stories seem overly staged and scripted, lacking flow and anecdotal detail. He is quite able to tell these same stories privately to me, and his passion and authenticity shine through. Then, when we practice and imagine an audience, he becomes tense and monotone, overly concerned with himself as a speaker, not willing or able to "let go" and simply let the stories and messages flow. My sense is that he is putting too much pressure on himself to make his public statements "performances".
>
> His writing has been truly moving during the past months, but the "on paper" eloquence is not finding its way into his oral presentations, which continue to be stiff, overly reliant heavily on notes, scripts and structures. It all lacks natural flow. I would like to find a way to spark a breakthrough, to get him to relax and speak more naturally.

Thus, I suggested the "writing as spoken" exercise in an attempt to bridge this gap between Tim's private and public communication. Rather than have him continue to write in his literary style, I urged him to imagine telling a story, to simply let the words flow on to the page, to write it exactly as he would speak it to me. I asked him to focus more on his messages and stories than on the act of speaking, to speak naturally and from the heart, rather than concern himself with making a "performance".

Somewhat to my surprise, the new exercise had an almost immediate effect on Tim's speaking and storytelling. He began to write the stories, and then tell them, in a natural tone, focusing more on his inner voice and less on the audience. He even conveyed some of the stories—about Collie, the Greek jail, or Father Frank—in a voice that was starting to sound natural, energetic, and passionate. In his writing, he began to simply let each

story flow on the paper, just as if telling it. Then, I asked him, as he wrote, to imagine himself telling the tale to a listener, writing in pauses for effect, and putting the words he wanted to stress in bold letters. When we practiced aloud, I told him to let himself get inside the story, to focus more on the substance of his message than on the form, and to just allow his stories "take over the space".

While we both recognized that there was still considerable work to be done—work on throwing away his notes and truly "letting go", work on transitions and flow, work on simplifying the stories, and work on adapting speeches and presentations to the audience and the context—the exercise of writing as spoken was leading to significant progress in Tim's self-expression. Now, after a good deal of reflection and hard work, he was finding his voice!

One of my goals during this phase was to get him to see the connection between his written exercise and our live sessions. I wanted to use the two types of practice to get Tim speaking in his natural voice, with energy and emotion. When he wrote, I asked him to think about his message, but also to focus on the tenor of his words, and to be aware of the impact his tone would have on the listeners. As Tim had a tendency toward a monotone and droning delivery, we spoke of the importance of (1) modulating his discourse by pausing and by varying speed and pitch, and (2) punctuating his discourse by emphasizing key words and concepts. While we will examine in more detail the concepts of punctuation and modulation in the following section, I introduced them to Tim at this point in the process, simply try to add some energy to his speaking by beginning to take out some of the monotonous tone.

In the passage below I present an example of Tim's writing as spoken, from November 2002, to provide a bit of the flavour of this exercise. As we were relatively early on in the writing as spoken concept, I asked Tim to focus in particular on two simple concepts: punctuating his key words, and using pause for effect. In fact, pausing may seem like an easy technique to master, but communication coach Sue Gaulke tells clients that it can be deceptively difficult. As she writes: "One of the most effective things a speaker can say is: nothing...Use a pause to emphasize a point, make a transition from one thought to another, and promote audience interaction. This sounds easy, but it's not!"(Gaulke, 1997 p. 67) Simmons also stresses the importance of paying attention to one's pauses and pacing. (Simmons, 2001 p. 100) In any case, I used the arguments of Gaulke and Simmons to

convince him, and Tim began the experiment of focusing on pacing, of incorporating pauses and punctuation into his writing, as shown in the following passage:

Illustration 10: *EXAMPLE OF TIM'S "WRITING AS SPOKEN"*

> One of the things we've **discovered** that there are simply **a lot of kids** around the world who **die each day because they don't have basic medicines, (PAUSE)** medicines that you and I can get easily and cheaply, even buy at the local pharmacy. But, we're talking about the **poorest** of the poor, **(PAUSE)** and they live in places where medicine is **just not available.**
>
> One of these places is a slum called Cité Soleil, in Haiti. Imagine a place where 300,000 people live on top of a landfill, in shacks so crowded the families have to sleep in shifts. Drug dealers run the place, and the kids there are all **severely malnourished.** They die from things you **won't believe (PAUSE)** like diarrhoea and chest colds **(PAUSE)** because they can't get basic medicines or are too poor to buy them. About one kid in five won't live to see his fifth birthday. **(PAUSE)** And I want to tell you about the women we work with. They're called Daughters of Charity, and they are terrific and **amazingly** courageous. **(PAUSE)** They are the only humanitarian group left in the area. Why? Well, everyone else has left because of the violence. But they stay...they run a school, a clinic, a centre for malnourished kids, a training centre for women and they've even started a sewing cooperative **(PAUSE)**,so that women can earn some money to feed their families. We get them the medicines they need to take care of these kids. **(PAUSE)** Now, these women treated over 25,000 children in the last six months with our medicines. **(Slow) They tell us that, without these medicines, many of these children would not be alive today (PAUSE) and, having seen the place...and the poverty...and the conditions...and the disease...we know what they tell us is true.**

Beginning in November 2002, I encouraged Tim to practice telling his stories with anyone he could "corner", as described in the previous section. Diligently, he continued to write his stories in spoken form, thinking with each imagined performance about altering the speed of delivery for effect, modulating his tone, punctuating and emphasizing certain words or phrases. His sheer persistence at this exercise was the key element that was to drive his significant progress as a speaker. In my interactive sessions with him, we created scenarios, bringing each anticipated audience into the picture.

For my part, I was increasingly convinced that writing as spoken provides a powerful form of visualization. The exercise of writing his stories and visualizing their delivery guided Tim toward a simple and straightforward speaking style. Whereas previously he had

written words on a page, it is through the practice of writing as spoken that Tim began to truly feel the words and their impact, and to envision himself as an effective speaker in front of a crowd. As he continued writing his stories in a natural voice, and then imagining himself telling his anecdotes in front of various audiences, his stories and messages started to take centre stage. He began to let each story flow, and to truly picture himself speaking in context. Every time he wrote or told a story in this new manner, he received the message again himself, and he gained confidence in his ability to tell it and to convey its significance.

4.11.2 Writing in a journal

As the leader begins to develop an instinct for telling stories, and a natural speaking style, I use a weekly writing assignment to help develop a feel for using inspirational storytelling in daily life. I ask clients to send me, at the end of each week, their entries in what I have come to call the "story speaking" journal. In these weekly instalments, they write not only their stories, but also reflections about their storytelling experiences. Specifically, I ask them to recount two or three storytelling events each week, including in their accounts: (1) the choice of the moment and setting, (2) the actual telling, in spoken style as best they can recall it, and (3) their impression of the effect on the listener(s). I emphasize that "storytelling events" are not necessarily momentous occasions before large crowds, but rather any attempt, planned or impromptu, to use storytelling to inspire others. Examples from daily life might include a client meeting, a formal or informal team gathering, a drink with colleagues after work, or indeed any teachable moment with an individual.

4.11.3 The journal as a tool for reflection

In general, writing a journal is a practice that I advocate and actively encourage as an exercise for leadership development and communication. Even when the leader is extremely busy, as are all the individuals I coach, I find that writing a journal forces the person to build moments of reflection into the weekly schedule. My coaching experience, along with my reading and research, has led me to the conviction that reflection is a critical and necessary element of a leader's development. Effective leaders spend significant

amounts of time reflecting, and through this reflection they constantly revise their worldviews and their own life stories.

Numerous voices support the notion that reflection is a vital element of a leader's ongoing growth. In *Managers Not MBAs*, Mintzberg asserts that managers and leaders must reflect continuously on their experience in order to progress: "learning is not doing; it is reflecting on doing. And reflecting is not an escape but an essential part of the management process—and probably its weakest component in today's hyper world." (Mintzberg, 2004 p. 228) General Electric CEO Jeff Immelt says that effective leaders are characterized by an inherent curiosity about the world around them, and that they spend a significant portion of their time trying to learn and understand things. Despite one of the corporate world's most demanding schedules, Immelt strives to spend much of his own time—up to 20% of it—reading and reflecting. (Sadowsky, 2001c)

In a *Harvard Business Review* article entitled "Beware the Busy Manager", Burch and Ghoshal argue that failure to spend reflective time is one of the modern manager's major shortcomings. (Bruch and Ghoshal, 2002 pp. 5-6) Since reflective time is so critical to a leader's development, and so neglected by most contemporary managers, I recommend the journal as a tool to stimulate the leader's reflection. Keeping a journal <u>forces</u> one to reflect, and I have found this structured reflection helpful to all who have done it with diligence. In addition, I have found that weekly conversations about journal entries are an important source of momentum, energy, and focus that deepen the connection between leader and coach.

4.11.4 Leading by autobiography

Increasingly, my research and coaching experience have convinced me that remaining close to one's autobiographical material is essential to effective leadership communication. In addition, the management and leadership literature contains numerous allusions to the concept that an individual's autobiographical narratives form the very base that makes leadership possible. In this vein, Shamir writes that it is through life experiences and the way they are organised into a life story that people develop a self-concept of a leader that supports and justifies their leadership role. (Shamir et al., 2002) Various authors have portrayed leaders as individuals for whom their own identity as a leader is a central and

important part of their self-concepts (Gardner and Avolio 1998), who revisit their autobiographical base continuously for learning and inspiration (Tichy 1997, 2002), and who strive to express to others—fully and freely—who they are and what they stand for. (Bennis 1989)

Writing a journal keeps one's autobiographical material top of mind. Leaders are constantly processing life's events and reconstructing their life stories. (Shamir et al., 2002, Sadowsky, 2002b) It is important to keep in mind that all human life stories are more constructions than recollections, and that we construct them continuously in our quest for identity and meaning. (Spence, 1982, Widdershoven, 1993 p. 2, Neisser, 1994) As leaders reflect on their life stories, they make meaningful linkages. (Gergen and Gergen, 1986 p. 255)

Human beings live life forward, but they explain and understand it by looking backwards. People will "restructure" their life stories to provide meaning and coherence, (Ibarra and Lineback, 2005) Therefore, autobiographical stories are not accurate and linear accounts of a leader's experiences; they are rather repositories for the individual's interpretations and explanations of his experiences. Any self-narrative will contain elements of creation and interpretation. It is this interpretation of life that inspirational leaders offer to their followers, through their "voice". (Bennis, 1994, Shamir et al., 2002)

However, while life stories are ultimately constructions, they are not free constructions. Personal narratives are constrained by the events of life, and narrators select the elements of the life story to confer meaning on prior events, even if these events may not have held such meaning at the time of their occurrence. (Josselson and Lieblich, 1993) Understanding life in terms of a coherent story involves highlighting elements, while ignoring or hiding others. This is not to imply that, in reconstructing life stories, leaders deliberately lie, though they may do so at times. More often, they see themselves as legitimately selecting and emphasizing certain events from a diversity of life experiences, and creating coherence by selecting and linking these events in meaningful ways. (Shamir et al., 2002) Bruner (1986), a leading proponent of "narrative modes of knowing", concurs with the view that the meaning of life stories stems less from life's events than from the connections and personal interpretations a narrator builds around these events.

Thus, telling a life story is not so much a recounting of events as a quest for identity and meaning. (Josselson and Lieblich, 1995) When we read and study the autobiographies

of well-known leaders, we often observe a quest for truth, coherence, and identity. For instance, Anwar Sadat chose the title *In search of identity* for his memoirs. In similar fashion, Gandhi recognizes that any autobiographical work is a subjective reconstruction and interpretation of events. The four-volume work that constitutes his life story carries the subtitle "The story of my experiments with truth." Gandhi's recounting of events and thoughts gives the distinct impression that the search for his personal truth and leadership identity has been an ongoing, lifelong endeavour. Even as he puts pen to paper toward the end of his life, he writes the autobiography with the outlook of someone still choosing, organising and interpreting his life's events, in his search for truth and coherence: "Writing it is itself one of the experiments with truth." (Gandhi, 1982 pp. 257-8)

When we read the autobiographies of such deep thinkers as Gandhi and Sadat, we observe this type of lifelong reflection, a quest for truth and meaning. Their autobiographies take the form of "searches for" or "experiments with" truth and meaning because their journeys toward true self-awareness and authenticity are permanent and enduring.

4.11.5 A journal in lieu of an autobiography

Rather than suggest that a leader I am coaching undertake the ambitious task of writing life memoirs, in the vein of Sadat or Gandhi, I recommend spending a few hours a week keeping the type of journal described above. The creation, shaping, and remoulding of life narratives is an ongoing, constant endeavour for winning leaders, and telling stories of identity is an important and necessary leadership behaviour. (Gardner and Laskin, 1995, Shamir et al., 2002, Tichy and Cohen, 1997) I have found that writing a journal constitutes one of the best ways to foster the construction of the compelling personal narratives that form the basis for leadership.

In Tim Bilodeau's writing during this period, in this crucial stage of his journey to self-knowledge and self-expression, we see the three elements above quite clearly. Through writing and learning to speak his autobiographical stories, Tim came to justify himself as a leader, grew his own story and leadership self-image, and learned to inspire his constituents with his stories of identity. In hindsight, the act of "writing as spoken" constituted such an important turning point in Tim's development because it is in the course of this exercise that he began, for the first time, to truly see himself as a leader,

and to believe that his life stories could have a deep impact on others. As Tim expressed to me in January 2004, it was during the period when he focused in his journal on writing as spoken that he felt his stories, his self-image as a leader, and his desire to do "bigger" things grow: "When I began writing as if I were telling my tales in a speech, it lit a fire inside me, and I felt for the first time that I could do more than influence my little corner of the world in a small way. As I tried to make my words inspirational for others, I was at the same time inspiring myself to dream bigger and go further." (Personal communication January 5, 2004)

The discipline of writing in a journal provides the structure that keeps the leader's stories present, and this writing is important in helping develop a storytelling mindset. Writing a "story speaking" journal, practicing live with a coach, and developing a storytelling frame of mind keep us close to our autobiographical stories, and this closeness encourages our stories to evolve. In the best cases, the interaction between leader and stories is exceedingly powerful; as we have seen, individuals and their stories often co-create each other.

The journal exercise builds closeness between leader and story, stimulating the powerful dynamic of co-creation described in 4.7, where leader and story simultaneously shape each other, causing each to rise to higher levels. In writing as spoken, and in visualizing an audience, we often see a story's meaning with more clarity and learn to tell it with more conviction. As our passion and conviction levels rise, we become more self-assured and consequently more persuasive, both to those around us and to ourselves. Thus, the leader's story is ever-evolving; with ongoing practice writing and telling, the leader's confidence grows. (Lipman, 1999 p. 89)

Leaders should practice writing and telling their stories often, and that they should revisit both their memories and their hopes. In so doing, "you may discover values and competencies that you hadn't considered." (Kouzes and Posner, 1993 p. 81) *In a sense, this happened with Tim when he began writing his stories while visualizing himself telling them. Writing the story of his internment in the Greek jail, for example, reconnected him with what he felt at that time—a deep conviction to fight injustice. Certainly, Tim's sense of injustice had never left him throughout his adult life. However, it was the writing as spoken exercise that sparked him to rediscover "values and competencies" he hadn't considered in depth for many years. As he describes: "Writing the story of the Greek jail,*

and imagining how I would tell it to an audience, brought all the emotion of that event back to me in a truly stirring manner. Then, I found myself thinking and talking about it with more fire and passion.. The whole process of writing and visualizing rekindled the passion of that moment in a manner I hadn't felt for a long time." (December 2004)

From my perspective, working in this manner with Tim demonstrated to me the true power of writing as spoken, particularly for the many people who, like Tim, are more comfortable writing their thoughts than articulating them to an audience. When he took the time to do this type of writing, not only was he reconnecting with his core messages, he was also learning to express them with fluency and persuasiveness. He worked through some problem areas in his speaking, increased his self-assurance, and improved the flow of his speeches and stories spectacularly *by putting pen to paper on a regular basis.*

Accordingly, the writing as spoken dynamic had a profound effect on Tim. This practice truly spawned a rekindling of his passion around key core values, and he expressed these values, though his stories, with far more conviction and passion. As he became increasingly comfortable telling his stories with emotion, I came to view the exercise of "writing as spoken:" as a form of projection. Tim was projecting himself into a larger leadership role, and onto a larger stage.

4.12 PROJECTING

As we observed at the close of the previous section, I have come to see the story-speaking journal as a form of projection, and this concept—learning to project—has come to play an important role in my leadership coaching. In our journal entries, as well as in live coaching sessions, I now focus on getting the individual to visualize communicating and performing as a leader. Thus, this section will address the general concept of "projection" in its various forms.

4.12.1 Projection onto the leadership stage

If leadership is indeed connected to theatre, as we saw in 4.8.7, then writing as spoken is a type of rehearsal, an important form of preparation for going "live" on stage. Writing in the style of one's "performance" provides clarity and self-assurance. As a leadership *persona* emerges, the leader expresses his vision of the future with a confidence that engages others and, in the most successful cases, creates a self-fulfilling story or prophecy. *As we will see, this self-fulfilling dynamic truly occurred with Tim and the group at Medicines for Humanity. The stories he crafted and organised in his writing prompted him to see himself as a leader with a larger destiny than he had imagined. As he came to justify himself as a leader, and as he grew into his leadership story, he inspired a group around him and embarked on the road to fulfilling his destiny.*

In a story-speaking journal, a leader can engage in "scripting" his performances, an action referred to by several authors as central to charismatic leadership. (Benford & Hunt 1992, Gardner & Avolio 1998, Boje 2000) The story-speaking journal is a place where one can reconnect with core beliefs and emotions, and then "rehearse" communicating them to others. For Simmons, this dynamic is critical: "You have to awaken the emotions in yourself that you want to awaken in them. Like an actor in a play, to communicate an emotion you have to feel it first." (Simmons, 2001 p. 151) *Tim Bilodeau's experience with writing as spoken certainly demonstrates this concept. As he describes it: "I think the exercise of writing my stories as if speaking them was a true turning point for me. As I've expressed several times in the past, I was amazed at how much the writing of my stories reawakened emotions in me, bringing them back in all their force. It was all very re-motivating." (February 2005)*

4.12.2 Projection and self-image

Learning to visualize oneself on the leadership stage, and becoming comfortable telling autobiographical stories, strengthens the individual's self-image and self-confidence (Ibarra and Lineback, 2005 p. 66) As a leader's autobiography forms the very base from which he can credibly lead, the telling of autobiographical stories is an important and

necessary act of leadership. (Shamir et al., 2002) When we write in our story-speaking journal, we are seeing ourselves, and evaluating our performance, in the role of leader.

As Tim wrote his stories and envisioned their delivery, his messages became clearer, and he grew increasingly confident as the leader of MFH and as a spokesperson for his core beliefs.

Writing autobiographically, keeping a speaking journal, allows us not only to reflect, but to develop and perfect our messages as well. In writing our stories, and considering their significance, we hear our fundamental themes again and again, and thus solidify our own sense of meaning and purpose. As Tim explains, "In the search to present my stories more effectively, I rewrote and rehearsed them, many times. As I was learning to communicate my vignettes in a more natural voice, the concepts they portray and the values they express simply took on greater significance in my mind. I became very certain that my message has true meaning. And, I was far more self-confident as well, since I was beginning to feel I could convey that meaning powerfully to an audience. I felt empowered to go new places, to take the organisation to a higher level." (March 18, 2004)

By early 2003, others were noticing a change in the way Tim communicated. Board member Patrick Wadden, for example, commented to me in January of that year that he felt Tim's speaking was "far clearer, more fluid, and more from the heart than before...His voice, his manner, and his entire presence are so much more natural than six months ago. I'm actually amazed at the change." (Personal communication January 6, 2003)

4.12.3 Projection and impression management

As an individual projects himself into leadership situations, he must become conscious of managing the impressions he presents to his various constituencies. In my work with leaders in the past decade, I have found that many of them simply do not pay enough attention to the images they present, focusing instead on the messages and information they wish to transmit to the listeners. Thus, the impact of their communication is very much diminished, since information and messages do not build trust, while the impressions we leave do! Numerous scholars refer to the acts of story construction, image building, and impression management as important leadership tools, often associated with inspirational

discourse. For example, Boje (1989) sees modern organisations as dramaturgical, and leaders as star performers who create, frame, and update images constantly. Shamir opines that we can reasonably assume that leaders, aware that telling their life story is a powerful tool for influencing others, construct and articulate images that serve that purpose. (Sadowsky, 2002b) In other words, in addition to telling autobiographical narratives, leaders actively manage—whether consciously or not—the images and impressions they convey to their listeners.

In this light, Conger and Kunungo affirm that charismatic leaders can be distinguished from others, in part, by their "use of articulation and impression management practices to inspire followers in pursuit of the vision." (Conger and Kunungo, 1987 p. 29) As far back as 1959, Goffman applied the metaphors of theatre and impression management to the way individuals present themselves in everyday life. (Goffman, 1959 p. xi) In his discussion of management, Goffman describes the business person as a performer, "a harried fabricator of impressions involved in the all-too-human task of staging a performance." (Goffman et al., 1997) Studies by Bass (1985, 1988, Bass and Stogdill, 1990) found charismatic leaders to be exceptionally expressive, actively employing rhetoric and impression management in their motivational discourse. For Gardner and Avolio (1998), these expressive, charismatic leaders are highly effective because they are the epitome of drama and impression formation. House's discussion of charismatic leadership behaviour links the concepts of impression management, dramaturgical skills, and "image building" with success at inspirational leadership communication. (House, 1977)

Since managing impressions is such a powerful communication device, I encourage leaders, in their speaking journals, to think about crafting and expressing the overriding impressions they wish to leave with their listeners. Then, in our writing and live practice, we work on crafting the images that bring these impressions to life. *For example, one of the self-images Tim manages is that of someone who has always been shocked by injustice in the world, and driven to respond. When he tells the story of his stay in the Greek jail, the listener receives the image of someone who will take a stand for what he believes and fight for fairness. He has learned to tell his stories, and manage impressions, in a manner so true and convincing that others are moved to want to contribute to his success. Program director Betty Scanlon, who joined MFH in July 2004, says that one of the reasons she decided to come to work at the company was the vividness of Tim's descriptions of the sites and the people working with at them. In addition, she finds his*

personal stories "powerful and inspirational", both to MFH insiders and to the partners in the field. In addition, she told me that watching Tim tell his stories has inspired her to use storytelling far more in her own work! (Personal communication May 25, 2005)

4.12.4 Projection and authenticity

While we have argued in this section that an individual's life stories are constructions more than recollections, that leadership is in part theatrical, and that effective leaders manage impressions and images, it is important to emphasize again here that we are not advocating creating of a fictional performance for a stage, or of fabricating an image of the leader that is in any way artificial. In the end, it is the leader's authentic voice that will move others to action. As Ibarra and Lineback state, storytelling will only engage listeners if it is seen as profoundly true. (Ibarra and Lineback, 2005 p. 66) Above all else, our stories must be true and from the heart, never fabrications or efforts to manipulate.

When I speak in public of my coaching of leaders, I often espouse the use of storytelling, theatrical methods, or impression management to help an individual communicate more effectively. In these instances, one of the few negative reactions I sometimes receive—whether from students, journalists, or audience members at a business conference or corporate seminar—is a tendency to view these techniques as potential forms of manipulation. To me, nothing could be further from the truth! Leaders become effective by learning to play themselves, naturally and authentically, of course, but also with enthusiasm. When a leader learns to speak from the heart, the use of personal stories and image management will enhance her aura of authenticity, not detract from it. I concur wholeheartedly with Rubin, who writes in her discussion of Gaulier's theatre training for leaders: "Playing a role does not undermine authenticity or honesty. It can mean acting as yourself with heightened energy and skill." (Rubin 2000) In fact, my view of the theatre is quite similar to that of Gaulier, who tells his students that they should not learn to play a role but rather learn to play themselves comfortably.

As Tim worked intently on writing in spoken form, and on imagining himself in front of an audience, his true inner voice gradually began to emerge, and the people closest to him started to notice a transformation in his speaking style. Throughout 2003, regular feedback from board members and employees was indicating to both of us that his hard

work was bearing fruit. Others were finally commenting that they were hearing Tim's true nature and authentic voice shine through in his discourse. Dick Weisberg, an MFH director, was particularly eloquent and enthusiastic in expressing his views of Tim's progress, in May 2003: "I've been frustrated for a long time when I hear Tim talk about this company and what he does, because his story is just so great, and it's never come across at all until now. Listening to him today, I see amazing progress from a year or two ago, but we're still not there yet. You know, I've watched him coach basketball, in an environment where he's completely comfortable, and he just takes over the space. There's no self-doubt; he just takes command. That said, I can't believe how far he's come in the last months. The story-based speeches and presentations he gives now are much more engaging and inspiring than what he used to do with logic and statistics. What a transformation! Now, he needs to take what he's learned with you, and use it to take over the space, just like he does on the basketball floor." (Personal conversation with Richard Weisberg May 20, 2003)

In my own judgment, as well, Tim had made significant strides since we began the writing as spoken dynamic in November 2002. Obviously, Tim's life stories, values and core beliefs had always been there, inside him and below the surface. But, they were not finding their way into his discourse until we had gone through the exercise of the journeyline, the live practice, and several months of writing as spoken.

4.12.5 Projection and amplification

While we have emphasized until now the importance of learning to tell autobiographical stories in one's natural voice, and a journal's potential role in this endeavour, we now strive to add energy and vigour to the leader's spoken discourse—an element I call "amplification". As I tell the leaders I coach, it is quite possible to speak in a very natural voice and still speak "small". We have all seen speakers who are natural, but uninspiring. As Gaulier says, "without knowing it, most of us are deeply boring…And leaders are the most boring of all." (Rubin, 2000) In order to connect with any audience, a leader must learn to speak "bigger", to seize a moment, to find an inspirational tone, and to communicate with an elevated energy level.

When I feel a leader has made significant progress toward finding his natural voice, I begin to work on amplification—taking our speaking to a higher energy level by showing emotion and enthusiasm. Continuing our writing as spoken in the weekly journal, we now try to visualize making a connection with the listeners, to feel the energy we seek to transmit in our words. While there are many ways to put energy into a story-based presentation, I have found three to be particularly effective, and relatively easy to implement with most speakers: (1) punctuation; (2) modulation; and (3) rhetorical questions. By punctuation, I simply mean insisting on certain words and concepts, highlighting them in our written work, and learning to "punch" them when we tell our stories and make our key points. Modulation is varying the speed and pitch of our voice, slowing down, pausing, speeding up, softening or hardening the tone to emphasize words, phrases or concepts. Rhetorical questions are those we ask of the audience without looking for a response. Rather, we use them for emphasis—to get listeners to focus on the central concepts we wish to leave with them.

Various consultants and communication experts use concepts and techniques similar to mine. While the terminology may change, the core concept is simple: a speaker must use variety to provide energy. Gaulke asserts that effective speakers think in terms of changing the beat. (Gaulke, 1997 p. 82) Similarly, Carlson suggests that effective speakers must vary the pace, pitch and force of their discourse. (Carlson, 2005) I have heard others use terms such as intensity, inflection, tone, speed or intonation. The overriding concept of all this is: In order to raise the energy level of our speaking and storytelling, we must be conscious of varying our discourse in ways that lend flair and vigour.

The great wartime leader and outstanding orator Winston Churchill, who "mobilized the English language and sent it into battle", (Hildreth, 2005) spent countless hours planning and writing his verbal communication, weighing not only his words but also the pauses, rhythm and cadence that would produce his desired dramatic effect. Daun Van Ee, co-author of *Churchill and the Great Republic* (Gilbert et al., 2004) and an authority on the Prime Minister's speaking technique, explains that Churchill was in fact a master of writing as spoken. All of his speeches were constructed and put to paper "in what he called 'psalm' form, like a psalm from the bible, almost poetry. In this way he could get the right emphasis and he could pause at the places where he wanted to pause. He could have exactly the kind of rhythm and the cadence that he wanted." (Brown, 2004) Thus,

Churchill visualized the tempo of each speech, and practiced it; he understood that the energy of the delivery is as important as the message itself.

In learning to amplify—to punctuate and modulate a speaker's delivery—I have found video to be an outstanding teaching device. *When I began videotaping Tim in early 2002, the reality of seeing himself "live" had a huge impact on him; in fact, he was quite surprised to see how monotone and bland his own verbal communication sounded on the screen. It was therefore relatively easy for him to see the value of modulation, and we have since worked on varying his tone for effect and emphasis whenever we have a live practice session. In addition, since we began the "writing as spoken" exercise, he has developed the discipline of punctuating his written assignments, placing in bold characters the words he wants to highlight in his storytelling. Adding simple rhetorical questions has also lent energy to Tim's speeches and stories.*

In general, both in my coaching and my observation of presenters, I have found the rhetorical question to be an underutilized tool. Interspersing a story-based speech with such simple, friendly questions as "Why am I telling you about this?", "So, what does this all mean to us?" or (in Tim's case) "How do you imagine children live in the poorest places on earth?" is a way of sustaining an interactive mood in the presentation, maintaining contact with the audience, avoiding monotony, and guiding the listener to the speaker's next concept. Even in slide-based presentations, I find that rhetorical questions in the style of "So, what do we see on this chart?" or "What do we find of particular interest in this information?" are quite effective in inviting listeners to think along with the speaker. For a presenter or storyteller, asking these questions provides an opportunity to vary the flow, to pause, to take a breath, to break the monotony, and to pump new energy into the speech.

Though working on adding energy to someone's speaking is an individualized and interactive part of the coaching process that is difficult to portray in the written medium of this document, I will attempt to give the reader some sense for how it works, in the short illustration below. If we consider again the example we showed above to demonstrate Tim's writing as spoken, from November 2002, I used the same passage a few months later (February 2003), when we began to focus more precisely on increasing the energy level in his speaking and storytelling. In the two paragraphs below I present Tim's original writing with my initial suggestions added in italics. While I realize that this written

example is somewhat artificial (In fact, much of this stage of my coaching—putting heightened energy into someone's discourse—happens in live or telephone practice, as well as in the written exercises.), and that it may be difficult for the reader to follow on paper, I do hope that the illustration lends some insight into this element of the coaching dynamic.

Illustration 11: *MY SUGGESTIONS FOR TIM'S WRITING AS SPOKEN*

One of the things we've **discovered** and something we find very interesting [slow] and **very** disturbing... there are simply **a lot of kids** around the world who **die** **<u>each day</u>** [slow]...Think about that...they die **each** and **every** day! Why do they die? [Pause] Simply, **because they don't have basic medicines**, medicines that you and I can get easily and cheaply, even buy at the local pharmacy. So, why don't they just go get them, like you and me? Well (slow), you have to remember...we're talking about the poorest of the poor, and they live in places where medicine is **just not available**.

So, you might be wondering, what are these places like, where the poorest of the poor live? Well, come with me to see now to "see" where we go...One of these places is a slum called Cite Soleil, in Haiti. Imagine a place where 300,000 people live on top of a landfill, in shacks so crowded the families have to sleep in shifts. Drug dealers run the place, and the kids there are all **severely malnourished**. So, you might wonder, why would we, why would anyone, **choose** to go to places like this? Well (pause), At Medicines for Humanity, we feel that this is where we belong, that **these** are the **very places** we belong, the places where children are dying senselessly, the places where we truly **can** do something special. And, we see where the children die, and we see **how** they die. And, what do you think they die from? They die from things you won't believe **(PAUSE)** like diarrhoea and chest colds **(PAUSE)** [slow, for emphasis] because they can't get basic medicines or are too poor to buy them. About one kid in five won't live to see his fifth birthday. **(PAUSE)** And I want to tell you about the women we work with. They're called Daughters of Charity, and they are terrific and amazingly courageous. **(PAUSE)** They are the only humanitarian group left in the area. Why? Why have all the others gone? Well, [Pause], everyone else has left because of the violence. But they stay, [slow] the Daughters stay, **alone**...they run a school, a clinic, a centre for malnourished kids, a training centre for women and they've even started a sewing cooperative **(PAUSE)**,so that women can earn some money to feed their families. So, what can people like us do? At Medicines for Humanity, what **do** we do? Very simply...We get them the medicines they need to take care of these kids. **(PAUSE)** Now, these women treated over 25,000 children in the last six months with our medicines. [Slow] Sometimes, I look out at the children playing in the streets, and I think about our impact. Because, what do you think the Daughters tell us? It's very simple... **They tell us that, without these medicines, many of these children would not be alive today**

(PAUSE) and, having seen the place...and the poverty...and the conditions...and the disease...we know what they tell us is true.

In the reworked passage above, note the use of the three methods for making the presentation livelier: punctuation (I put suggestions of the words to emphasize in bold.), modulation (indications, from both Tim and myself, of where to pause or slow down), and rhetorical questioning to hold the listeners' attention, to keep the audience in the story. I should emphasize that implementing these principles, working on amplification—finding the heightened energy and emotion that engage the listeners—takes continued dedication, hard work and attention to detail. Changing someone's speaking style, a style that has developed over a lifetime, is simply hard work! And, as we will see in our chapter on "avoiding pitfalls", leaders sometimes consider that finding their natural voice represents remarkable progress, and they then fail to do the work necessary to raise the energy level of their presentations.

As I write this section in October 2005, my frank evaluation of Tim is that he has done remarkable work on finding his natural voice and telling compelling stories. Together, we have transformed him into a truly inspirational speaker. However, I would still like to see him work more on amplification. While the natural speaking style is always there now, his passion and commitment do not shine through in all instances. At times, I have seen him come across as truly inspirational, while in other contexts his delivery has lacked the amplified energy I would like to see. In other words, he does not always "take over the space" with his energy and passion. Despite his own assertion that he has been "knocking them dead" with his recent speeches, we have work left to do!

I close this section with a simple word of caution about amplification. While heightened energy constitutes a crucial element of effective communication, we should never lose sight of the fact that we focus first and foremost on finding the leader's natural voice. Most important are the inward journey to clarity about the leader's core beliefs, and then the practicing of our storytelling until the public voice becomes true, authentic, and natural. Emphasizing too much or too early the notion of amplification introduces the potential risk of concentrating our efforts too much on the speech and too little on the speaker. Whenever we work with theatre or speaking techniques, it is always to help express the individual's true nature, never to sell a false, unauthentic, or hyped image.

4.12.6 Projection and the self-fulfilling story

Bass writes: "The leader who arouses in subordinates confidence in their own capabilities and confidence in those with whom they work, all things being equal, by raising expectations about the success of their efforts, will increase such efforts to succeed." (Bass, 1985 p. 71) In other words, people who believe their groups will succeed are more likely to work harder to contribute to that success. In the most extreme cases, belief in success leads to success; success then leads to belief in future success, and so on, in escalating fashion.

While this concept—that belief in success leads to success—may appear overly simplistic or utopian, research has confirmed the legitimacy of the "Pygmalion principle" in several diverse contexts. (For a discussion of the myth of Pygmalion, see Hamilton, 1940 pp. 108-111) Applied to modern everyday contexts, the Pygmalion effect refers to self-fulfilling prophecy: If we believe hard enough, our creations—expectations, projections, or images of the future that exist in the mind only—can become reality, as did the sculptor's statue.

One of the earliest experiments that demonstrated the legitimacy of the Pygmalion principle was done in elementary school classrooms in the 1960s, as recounted by Rosenthal and Jacobson. (Rosenthal and Jacobson, 1968) In this fascinating study, higher teacher expectations led to improved student results. In *The Unconscious Conspiracy: Why Leaders Can't Lead*, Bennis cites additional research to support the premise that teacher confidence leads to better student performance: "In a study of school teachers, it turned out that when they held high expectations of their students, that alone was enough to cause in increase of 25 points in the students' IQ scores.". (Bennis, 1976 quoted in "Management Gurus")

A double-blind experiment conducted in the California in the 1980s yielded a similar conclusion about the impact of teachers' expectations and confidence on student performance. (From Nell Mohney's book, *Beliefs Can Influence Attitudes*, as cited in LeVario-Gutierrez, 2004 , and Maxwell, 1993 p. 99-100)

Lest one imagine that Pygmalion applies only to scholastic situations, there is also significant evidence that expectations of success or failure affect adult performance as well, and in various arenas. Indeed, in a 30-year study, Dr. Martin Seligman, author of

Learned Optimism, discovered that one of the most significant predictors of success, in numerous fields, is optimistic expectations. (Seligman, 1991) Commenting on what makes an effective leader in sports, American baseball legend Reggie Jackson said that in his mind one overriding characteristic separated outstanding managers from average ones. In his opinion, "a great manager has a knack for making ballplayers think they are better than they think they are." (Jackson, 2005) Wal-Mart founder Sam Walton echoes Jackson's sentiment that effective leaders help people believe in themselves—and that stories of success and achievement can become self-fulfilling when people envision success and expect positive outcomes. (Pulsifer and Pulsifer, 2004)

Covey cites the Pygmalion effect in his work and explains that he has come to understand "how deeply imbedded our perceptions are", and how much people's expectations colour their behaviour and performance. (Covey, 1989 p. 17) Bass concurs that when people expect success, levels of performance rise, and that Pygmalion is a phenomenon that applies to human behaviour in general, across all contexts: "In its most general form, the Pygmalion effort [sic] is a performance-stimulating effect." (Bass, 1985 p. 71)

Psychologist Gail Sheehy (1995 p. 169) is convinced that the stories human beings tell themselves tend to become self-fulfilling. After researching hundreds of organisations, Peters and Waterman observed that the old adage "nothing succeeds like success" has a sound scientific basis. (Peters and Waterman, 1982 p. 58) In *Weird Ideas That Work*, Robert Sutton discusses the relevance of the Pygmalion principle to the workplace, citing more than 500 studies on self-fulfilling prophecy. While most of the studies come from the worlds of psychology and education, Sutton says that a significant number were done in a cross-section of diverse organisations, and that the results can be readily applied to management in general. (Sutton, 2002 p. 107)

John C. Maxwell proclaims that "People tend to become what the most important people in their lives think they will become." (Maxwell, 2005 p. 106) Though he does not use the term specifically, Maxwell's observations validate the Pygmalion effect, particularly in cases where workers are encouraged to succeed. As Sutton explains, "To increase the chances of success...convince yourself and everyone else that, with determination and persistence, the idea is destined to triumph." (Sutton, 2002 p. 106) Psychologist Don Eden, who has written extensively on the Pygmalion phenomenon (Eden, 1984, 1982, 1992), feels that a leader's role in communicating performance expectations to subordinates has been generally neglected in leadership research.

4.12.7 Projection into a Hero's Journey

The ultimate "productive self-fulfilling prophecy", to use Eden's term, may happen when a leader convinces the followers that they share a heroic story—that they are embarked on "The Hero's Journey", as described by Campbell. (2005) As we have discussed above, getting people to feel that they share a story is a powerful motivator. If that story is seen as a heroic journey, the people's inspiration is all the stronger. In order to understand the general concept of the monomyth, and the power of the Hero archetype, we will briefly describe Campbell's point of view, and give a simplified explanation of the Hero's Journey. An in-depth discussion of this classic journey—with all its stages and sub-stages—is perhaps beyond the scope of the present work; those interested may find far more detail in *The Hero with a Thousand Faces*, or elaborate applications of the monomyth in Vogler (1992, 1998, 2000) and Mark and Pearson (2001).

The pattern of the Hero's Journey is elegant and simple. A hero "ventures forth from the world of the common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man." (Campbell, 1973 p. 30) Similarly to Jung, Campbell believed that the myths of all cultures are linked, since they represent cultural expressions of the universal need of the human psyche to explain and interpret the human condition.

As Campbell and others (Propp, 1968, Raglan, 1956) have suggested, the Hero's Journey is a template that classic myths from all cultures appear to follow. Many of our modern

tales also repeat the monomythic structure, as Vogler (1998), Berger (1997), Bruner (1991), and Mark and Pearson (2001) have demonstrated. *Star Wars* creator George Lucas, in fact, was greatly influenced by Campbell and the Arthurian myth cycle. (Mark and Pearson 2001)

4.12.8 The Leader's Journey, heroic tales, and the modern organisation

What does all this talk of universal stories, archetypes, journeys and heroes have to do with leadership, or with today's organisation? A lot, in fact, say several scholars of leadership and organisations: the Hero's Journey can be used effectively to lead and motivate, at both the individual and the group level.[5] (Boje, 2000b, Deal and Kennedy, 1982 p. 57, Jennings, 1960 p. 73, Simmons, 2001 p. 38-9)

The story of Tim Bilodeau—the founding and expansion of Medicines for Humanity—provides a striking example of a seemingly common individual who embarks on a Hero's Journey. As we have seen, in the early 1990s, Tim was relatively content and secure in his "ordinary" world—in this case, making a good living on a traditional corporate path. At the same time, he describes his uneasiness in the ordinary world. Where was the "something special" he had been searching for, the activity that would provide deeper meaning to his life's work? His "call to adventure" comes in the form of a newspaper article he read on the beach one Sunday morning, an article that told the story of doctors and volunteers helping the poor people of Ecuador. While he believes that this type of activity may be his true calling, Tim proceeds slowly, keeping his full-time job while donating some of his time to humanitarian organisations. After a period of hesitation and questioning, Tim embraces his adventure, leaving his ordinary world behind and founding MFH. He truly descends into the Netherworld, journeying to the poorest places on Earth to search for ways to lessen child mortality. This quest becomes heroic, and he faces insurmountable odds and overwhelming challenges: How does a lone individual have an impact on one of the world's great injustices? In the end, Tim grabs the proverbial sword,

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[5] http://tlc.discovery.com/convergence/arthur/article/selfhelp.html

finding the "elixir" in his plan to send medicines to the world's deprived, and entering into partnerships that provide critical resources to effective local health care organisations. Transformed by the his own voyage, he returns to the ordinary (corporate) world, recruiting a team of employees and volunteers by portraying a story of deeper purpose, a way to give everyone's life increased significance. Today, Tim has truly become "master of two worlds", splitting his time between the ordinary world of fundraising and managing his not-for-profit corporation, while all the .while making frequent journeys to the "special" world of the severely underprivileged.

Why do groups identify so absolutely with heroic stories, and why is the Hero's Journey in particular so inspirational? First of all, it is present in all cultures. It is a drama so central to the human condition that we are preprogrammed to recognize and embrace it. (Vogler, 1992, Jobling, 2001, Coutu, 2006 p. 43) Second, the hero archetype is central to the leader's work, since the Hero's Journey motivates groups by spreading confidence that the group's undertaking will succeed. (Bennis and Nanus, 1985 p. 30, Eden, 1992 p. 293, Kouzes and Posner, 1995 p. 289) Thus, Kanter states that outstanding leaders are characterized by an ability to "deliver confidence" (Anderson, 2005), while Bennis calls leaders "purveyors of hope". (Bennis, 1996 p. 6) Gurley (1999) proclaims that leaders who inspire confidence are the "great storytellers [who] can create self-fulfilling prophecies."

Thirdly, we identify with heroes and the heroic quest because such identification fulfils a deep psychological need: the desire to participate in an extraordinary and meaningful adventure, something more exciting than our mundane ordinary world. (Eliade and Trask, 1965 p. 126, Bettelheim, 1976 pp. 9-10) The feeling of participating in a heroic journey, of making an emotional commitment to a collective organisational adventure, is among the world's most powerful motivators. (Bennis and Biederman, 1997, Katzenbach, 2003, Stone, 1996, 2003, Welles, 1996) For Katzenbach, it is the sense of pride in the journey, not financial compensation, that leads to truly outstanding performance: "People who are emotionally committed to something...behave in ways that defy logic and often produce results that are well beyond expectations. They pursue impossible dreams, work ridiculous hours, and resolve unsolvable problems." (LaBarre, 2003 p. 38)

As I have pointed out and in several articles (Roche and Sadowsky, 2001, 2002, 2004, Sadowsky and Roche, 2003), Apple co-founder and current CEO Steve Jobs is undoubtedly one of the modern masters of inspirational storytelling. In the early days of

the Macintosh era, Jobs motivated the Mac group "pirates" by portraying them as the valiant heroes of a new era, battling the forces of darkness, the world's sole hope for liberation from the pathetic dullness and monotony of the IBM-PC. (Cringely, 1996, Sculley and Byrne, 1988, Levy, 1995)

4.12.9 Everyday heroes of the workplace

Gabriel writes that true heroic discourse in modern business is a relatively recent phenomenon, having surfaced, or re-resurfaced, during the last 25 years. (Gabriel, 2000 p. 74) If business has indeed rediscovered the hero, it is perhaps because of a change in the corporate landscape—the transition from the industrial age to the information age, and the resulting re-focusing on the critical role individuals can play in organisations. (Ghoshal and Bartlett, 1997) Stone (2003) follows this line of thinking, as he opines that the most successful modern businesses are arenas where any individual, at any hierarchical level, can create his own heroic story. Similarly, Hubert Saint-Onge (2004), CEO of Konverge Digital Solutions Corp., encourages all individuals to "see business as a vehicle for expressing one's greatness", regardless of their position in their organisations. (Sadowsky, 2003)

Simply put, the Hero's Journey is not just for heroes anymore. Today, increasingly, it is going "mainstream" throughout our organisations. Accordingly, it is no accident that the terms "hero" and "hero's journey" have found their way into the vocabulary of industry. (O'Hara-Devereaux, 2004 pp. 8-9, Birchard, 2002) Modern hero stories often tell tales of individual triumph, of exemplary courage and persistence that can be held up as an inspiration to all. For example, Peters tells a story about a Federal Express employee who rented a helicopter to insure timely delivery, illustrating a heroic commitment to the company's promise of reliability despite all obstacles. (Peters and Waterman, 1982) Company veteran Ed Robertson stresses the importance of these heroic stories at FedEx: "Our leaders are 'executive rhetoricians' whose speech is laden with stories about Federal Express' work ethic and what made the company great." (Wylie, 1998)

In organisations with strong corporate cultures, the heroic proportions of these legends may be exaggerated—even in part apocryphal—as will be the case of any mythology, corporate or otherwise. However, the specific facts of the celebrated tales are not what

matters. What matters far more are the plausibility and authenticity of the message, and the passing on of the story. (Cohen and Prusak, 2001, Neuhauser, 1993a, Simmons, 2001) In fact, according to Stone, businesses need stories that can be turned into myth. As he elucidates: "People crave for heroes, hence they mythologize them...A business without heroes is flat, lifeless, and uninspiring." (Stone, 2003)

Since the mythical heroic quest is such a powerful and universal motivator, several authors advocate the telling of hero stories throughout the organisation, with the goal of providing continuous renewal and inspiration. (Armstrong, 1992 p. 12, Cohen and Prusak, 2001 p. 121, Neuhauser, 1993a p. 83, Spector and McCarthy, 1995) Hero stories are often inspirational, mythical tales from the past. As Mahler (1988 p. 344) relates, the function of mythic stories and legends is to inspire through example: "In every complex organisation, stories are told about the organisation's founding, the exploits of its members...These stories help define the organisation and its mission, often by portraying it in heroic and noble terms to members and outsiders."

When Anne Mulcahy was working to create the remarkable turnaround at Xerox in the early years of this century, she uncovered and tapped into the stories of the company's day-to-day heroes. (Hammonds, 2005 p. 96) At Nordstrom, Patrick McCarthy searches for hero stories that he can share, to provide the models for all employees to follow: "I'm looking for heroic service, someone who really goes beyond." (DeFelice, 2005 p. 49) According to Stone, businesses should look to find heroes in unexpected and mundane places. Celebrating the extraordinary events of day-to-day company life keeps an organisation lively. (Stone, 2003) In this vein, Nordstrom uses its "everyday hero" stories in employee orientation, rather than rely on detailed handbooks describing how to deliver great service to customers. (Lencioni, 2002 p. 117)

The heroic story can also function at the group level, and the feeling of participation in something bigger than themselves helps keep the employees motivated to excel. Herb Kelleher, ex-CEO of Southwest Airlines, tells numerous tales of group behaviour that exemplify the culture he wanted to create at the iconoclastic airline—a culture of individual and group heroism that becomes self-initiating and self-sustaining. (Kelleher, 2005) In companies such as Southwest Airlines, where workers at all levels share the heroic journey, there is an environment that "unleashes the archetypal spirit of heroism in an organisation, leading to untold psychological and spiritual benefits for the company's

employees." (Stone 2003)

We identify with Tim Bilodeau because he provides a dream for us, a dream that we can indeed find deeper meaning in our lives. He tells, and shares, a quiet but powerful story, a story that resonates with us because it reflects the classic drama and quest we all live, the common angst of the human condition. His stories are simultaneously tales of heroic quest and tales of inclusion. As a leader, he not only shows the path of the Hero, he shares the heroic journey with us.

4.13 PERSONALIZING

The next two concepts, that we seek to personalize and simplify our leadership stories, should be emphasized at every stage of the coaching process. If there is one truth I have discovered in my coaching and teaching during the last 10 years, it is that straight, direct, and personally honest communication is the most effective.

My coaching experience and observation of leaders have persuaded me unequivocally that personalization works. It is through our personal stories that we make a deep, emotional connection with our audience. When I began coaching CEO Nick Heys in the early days of Emailvision, his presentations were impressively structured graphical shows, replete with remarkable market growth statistics and persuasive rational argument. However, it was not until he began to tell his own stories to investors and clients that he started to convince them. As he sees it, personalizing his presentations constituted a turning point in the company's history: "It took quite a bit of time for me to realize the true power of putting one's personal stories at the centre of the selling process." (Communication to investors on November 3, 2005)

Similarly, Nilesh Nanavati of AFA (whose case study is the object of chapter 5.1) came to understand the power of telling his personal stories to convince others. When we embarked on our coaching project in October 2002, Nilesh was quite preoccupied with the resistance he was encountering when selling AFA's software to corporate clients. At that time, his sales pitch consisted of a series of PowerPoint slides that explained, in great detail, the merits of his company's "technology". As we rehearsed selling scenarios, it

became clear to me that he would not connect with his audience until he got more of himself and his own stories into his presentations. In actual fact, and by his own account, it was not until he reworked his presentations with a new, personalized message that he became an effective sales person for AFA's services.

Beyond my own coaching experience, there is ample support in the literature for the idea that the most effective leadership stories are profoundly personal. (Katzenbach, 2003 p. 193, Pearce, 1995 p. 91) Weil tells us straightforwardly that "the most effective leaders are in touch with their personal stories." (Weil, 1998 p. 40) Kouzes and Posner make the case that effective storytelling requires personalization, as it is the speaker's passion that truly moves the listeners. (Kouzes and Posner, 1993 p. 210) For Schank "the important point is to personalize it [the story], to particularize it, to draw as many references as possible to real world events." (Schank, 1995 p. 214)

All through his coaching career, Phil Jackson has certainly brought his best personal stories to work with him. At team gatherings, he often told stories from his practice of Zen, or tales of the lessons of selflessness he learned from spending time with the Lakota Sioux tribe. In large part, Jackson credits the personal stories he shared—stories of boyhood discoveries, of Zen Buddhism, of his own championships a player, or of his study of the Lakota Sioux—with a radical transformation of the Bulls' attitude and approach to the game. (Jackson and Delehanty, 1995 particularly pp. 33-58)

In almost every case, discovering the value of personalization has been a significant "revelation" for those I coach. Tim Bilodeau affirms that personalization is simply one of the "great epiphanies" of our work together: "I found that the more I put my self and my feelings into speeches and presentations, the more I connected with audiences. It was a remarkable revelation for me." (December 31, 2004) Throughout 2004, Tim and I worked on personalizing all his discourse, putting more of his reactions and his passion into his storytelling. For example, he modified the telling of his 'Father Frank' story, shifting the focus from recounting the event to describing Tim's own feelings of indignation. According to Tim, the audience reaction changed dramatically; he could actually feel listeners' level of interest and attention rise. (Personal communication December 31, 2004)

As Tim's stories became increasingly personal, evidence abounded that they were having greater impact on his listeners. For example, Betty Scanlon, who became MFH's

program director in July 2004, conveyed to me in early 2005 her favourable impression of the "new" version, where Tim put his own emotion at the centre of the tale. As she states: "I have heard him talk about Father Frank Smith on numerous occasions, before I joined Medicines for Humanity and also since I've been working here. I find it far more moving when he expresses his feelings of indignation, based on what he saw, and of his strong conviction that no woman should ever have to make that choice. When he throws himself into that story, listeners truly experience his sense of injustice, and his indignation! It is powerful and deeply moving." (Personal communication January 8, 2005) MFH director and legal counsel Tom Bilodeau adds that, for him, the "key turning point" in Tim's presentations happened "when his speaking became truly personal. We began to feel him, not just the facts and figures. It was the personal stories and vision that inspired us." (October 12, 2004)

Personalizing, when done with authenticity and genuine feeling, creates a connection between the teller and the listeners. Pearce (1995 p. 103-4) describes how personal detail in discourse increases an audience's confidence in the speaker. As such, Honey (1992) advises all speakers that above all else, they should "keep it personal. 'This happened once...' is not as stimulating as 'This happened to me...' Everyone likes to feel they are getting first hand testimony or the actual story."

The difficulty of personalizing

For the coach, one of the tricky elements of personalization is getting humble people to tell anecdotes about themselves. These individuals may take my insistence on personalization as asking them to self-promote, a form of discourse that makes them uncomfortable. In such cases, I emphasize that one can be modest and deeply personal at the same time, and that personal detail and emotion lead to our best connections with any audience. Indeed, Maguire makes the distinction between an effective story, with an appropriate level of personal detail, and a self-indulgent or self-promoting tale. He is a strong proponent of personalization, provided the teller avoids excess. (Maguire, 1998 p. 20)

In the first few months of our work together, Nilesh Nanavati had great difficulty personalizing any business conversation or presentation, since he comes from a culture where it is seen as impolite or boastful to talk about one's self. However, as he developed as a public speaker and presenter, he observed on numerous occasions that telling his

personal stories—stories of who he is, where he comes from, what he has learned through his professional experience, and what he stands for—had a profound effect on his listeners. Indeed, he came to believe that telling a personal story was the best way to "find the emotional triggers" that allowed him to connect with those he sought to influence. (Personal communication July 28, 2004)

Tim Bilodeau is an example of someone who came to understand the power of personalization. As he describes, "Personalizing my stories was a huge step in improving my communication. As I practiced putting myself in the story, I literally began to feel audiences come alive and plug in to my message. I am sure we were able to raise more money and reach more people because of it." (Personal communication, June 2004)

4.14 SIMPLIFYING

Though I am generally reluctant to generalize, there is one sweeping statement I would venture to make about the leaders I observe and coach: They tend to make their oral communication, including their stories, more complex than necessary for the given context. In making this point, I often invoke Einstein's *first* rule: Out of clutter, find simplicity. (Einstein, 2006)

During the last 10 years, I have come to believe more and more that a speaker should stick to a few key points; too many of the speeches or the stories I hear overwhelm the listener with detail, while the key points remain difficult to recall. Indeed, experience has led me to the conclusion that there is a vast human tendency to over-complicate our messages. Nevertheless, whenever I speak of simplification, I need to clarify one vital notion: I am not advocating that speakers gloss over or abbreviate their central concepts; simplification is more about learning to stay focused, and to tell one's stories lucidly and efficiently. As Carlson explains, simplifying should not be a synonym for "dumbing down" the message. Rather, simplification means learning to express one's core messages concisely, and with clarity of thought. (Carlson, 2005)

Storytelling should be a tool to help simplify our communication. Indeed, well-chosen stories, when delivered effectively, have the advantage of helping human beings to see and

understand complex concepts. (Cohen and Prusak, 2001 p. 82, Simmons, 2001 p. 37) Snowden calls story "an all-pervasive technique that provides a simple way of conveying complex ideas." (Snowden, 2000 p. 225) Austin argues that storytelling is among the most valuable of management tools, since "There is probably no better method for communicating important, sometimes complex concepts in a simple and memorable way." (Austin, 1995 p. 14)

Wilkins writes (simply!): "Stories are a powerful way to communicate—they simplify complex concepts." (Wilkins, 1984 p. 89) This capacity to reduce complexity to understandable form has also been celebrated as a societal phenomenon since the beginning of time. As Elder and Cobb argue, story, in the form of myth, has been powerful through the ages because it simplifies the complex lessons of life. (Elder and Cobb, 1983 p. 54) Nicholson concurs that "stories are memorable because they simplify and dramatize." (Nicholson, 2000 p. 210) Likewise, Simmons summarizes: "A good story simplifies our world into something that we feel like we can understand." (Simmons, 2001 p. 30) In their discussion of strategy as narrative, Barry and Elmes (1997) discuss the need for leaders to learn to cut through the clutter of modern information overload and deliver concise messages in the form of short, artful stories.

The above testimonials notwithstanding, I often observe leaders who forfeit the inherent advantages of story by spinning too detailed or complex a tale. If our stories are too intricate and replete with unnecessary detail, the central point is hard to find, and the audience loses the thread. (Weissman, 2003 p.13) Pearce warns speakers against the dangers of over-complication, stating that "the evidence you offer should be restricted to a few powerful pieces that appeal to both the minds and the hearts of the audience." (Pearce, 1995 p. 69) Based on my experience and observation, I advise speakers that most audiences will only retain a few central themes. Accordingly, one should strive to make 3 or 4 points clearly, illustrating the key concepts with one's personal stories.

With Nilesh Nanavati, we worked for several months in late 2002 to reduce his sales story to its simplest elements. My initial approach was to ask him to speak in the following hypothetical circumstance: Imagine sitting on an airplane next to someone who knows little about Wall St. or hedge funds, and he asks you to explain what your company does. At first, Nilesh was completely incapable of connecting with his listener in this type of situation. His story in this context did not connect with the listener at all; despite the many

weeks of practice, his message remained overly intricate and unclear. Finally, after numerous live practice sessions, and considerable prodding, we discovered an uncomplicated and direct way to portray it: "At AFA, we want to simplify trading for institutional investors, like what e*Trade did for the individual investor." Once he was able to reduce this story to this down-to-earth form, it began to resonate with his listeners. Sales results soon followed!

Nilesh's case is far from an isolated one. On the contrary, I can truly say that all the leaders I have coached became more effective at convincing key constituents after we worked on simplifying their messages. Certainly, I am far from alone in encouraging leaders to simplify their presentations and their stories. For example, when Weissman (2003 p. xl) relates his experience with the "IPO road show" of Cisco Systems, we see that his central focus was streamlining the company's presentation to remove complexity. As a result, "Cisco persuaded investors to provide billions in capital to support a technology so esoteric that, even today [2004], few people really understand it." Pearce is also a fervent advocate of simple and straight communication. (Pearce, 1995 p. 90) In his discussion of using storytelling to inspire in a business context, Katzenbach concludes: "a good story makes a few points clearly." (Katzenbach, 2003 p. 193)

Simplification has the added advantage of making a speech easy to remember for the speaker, as Tim Bilodeau can attest. For nearly two years, Tim relied on written notes to remind himself of the many points he felt the need to remember. When I insisted, increasingly over time, that he work on speaking without his notes, he would become unsure, often losing his train of thought in the middle of a speech. Through a combination of simplification and hours of training, Tim was finally able to free himself from his "crutch". The first time he made a speech without a paper in front of him, he termed it a true "liberating moment". As he explains: "What helped most was pruning out a lot of unnecessary elements, making things straight and simple, so I don't get lost anymore. Since I have confidence that my key points and the stories are there, I don't worry about remembering every detail. I can just let myself go." (December 24, 2002)

4.15 ZOOMING AROUND THE CORE

When the leaders I coach start to show mastery of the simple, straightforward discourse we advocated in the previous section, I ask them to add anecdotal detail or explanation to fit a given context, practicing a concept I call "zooming around the core". Not only have I found this "zooming" to be an essential type of expertise, it is a one of the coaching exercises I utilize most often. If one thinks of the leader's stories—autobiographical stories, stories of vision for the future, selling stories, organisational stories of identity—as targets, each has a core message or theme at the centre. In the hurried situations of modern business life, a world where people's time and attention span are usually limited, we often need to go directly to the bull's-eye, rapidly delivering the essential points we want the listener to retain.

Still, there are numerous settings in which we may have opportunities to amplify our messages, or an audience that demands more detail. Moreover, certain circumstances may require a change of tone, an extended introduction, or an element of indirectness. Thus, to help the individual I am coaching become comfortable in a wide variety of contexts, we visualize telling our stories, and we practice "live", zooming to adapt to each audience. Examples of hypothetical situations I use include:

--During a retreat with the board of directors, or a management offsite, a time to strategize and dream with your associates, how would you tell more comprehensive versions of your future vision, or your core stories of identity?

--At a follow-up meeting with venture capitalists, many in the room are looking to dig deeper into your company story, vision, business plan, and technology strategy. Someone asks you to explain, in detail, what is unique about your technology and how you will sell it in the marketplace.

--Your company sponsors a road race or a golf tournament. At the post-event party, the organisers of the affair ask you to say a few words about who you are, what your company does, and why you are involved in the event.

While I often help leaders prepare for the specific communication situations and challenges in their lives, I have also found the hypothetical exercise of zooming to be remarkably

valuable. In fact, it is learning to zoom around one's core stories—perhaps more than any other form of practice—that teaches a speaker to be authentic and natural. With practice, we come to realize that we can "zoom in and out" to fit our audience, and thus tell an effective story in virtually any environment. As Nilesh Nanavati explains, "the insistence on zooming taught me that I could adjust to any context. Though I joked that the zooming and repetition might drive me crazy, it really is a great exercise...It helped me learn to stay close to my core concepts, and to add detail naturally, without getting lost. In fact, the frequent zooming probably improved my speaking more than anything else we did." (Personal communication July 23, 2004)

4.15.1 Tim Bilodeau learns to zoom

Tim and I used zooming exercises extensively from early 2002 through the end of 2004, concurrently with writing as spoken, as an integral part of the effort to modify his general approach to oral communication. As we have seen since the early chapters, my principal goal with Tim was to help him become an inspirational storyteller, as opposed to a transmitter of information. Rather than present logical explanations of his organisation's purpose or its impact, with memorised data and rational appeals to a listener's intellect, I wanted him to tell his story naturally, and with emotion.

When I began working with Tim, speaking engagements of any sort rendered him nervous. Even after our work together on his personal journey, even after he had learned to write his stories of identity with flair and eloquence, his oral presentations were hesitant and monotone. In my view, this faltering delivery stemmed from an excessive concern about leaving out detail when he told his stories, or from a lack of confidence in his ability to organise a talk without reading from his notes. I felt it essential that he to learn to "live in the moment", to speak out naturally and without self-consciousness. Mastering a storytelling approach would allow him to connect with people in any gathering, to capture the space and the audience with his message, to express his passion for his work, and to leave his listeners with a few clear and simple images.

To chronicle Tim's development, I saved numerous videos from our practice sessions. In one of these tapes, dated 15 September 2002, Tim makes a mock presentation, and we see his typical style from this time period. While the stories—of Collie, of the Greek Jail, of

Father Frank Smith, or of the Last Judgment—provide fascinating subject matter, they are related with almost no energy or passion. It takes Tim a long time to get to his important points, and the central themes are lost in his circuitous discourse. Tim is ill at ease: several times he asks the cameraman to stop so that he can collect his thoughts. Transitions are weak, the stories are too long, and the overall effect is uninspiring.

At the time of this particular video, Tim had begun to practice addressing his audience without reading from a scripted text, and it is clear that he is not yet comfortable with this type of talk. Though I felt that speaking without notes already constituted significant progress for Tim, he now seemed to be trying to recall his entire speech from memory, to follow pre-established structures, to hold all the detail of each story in his head and remember to "get it all in". The desire, or perhaps the need, to memorise was rendering his presentations unnatural—and tedious for the listener. I wanted him to let himself go and simply speak from the heart! Until we freed him from this reliance on memorising a rigid structure, and the excessive concern with including every last detail, he would never sound natural or authentic.

In demonstrating the impact of our coaching journey on Tim's self-expression, I often compare the September 2002 video with another from January 6, 2004. When I juxtapose these two examples of Tim speaking, all observers find the contrast striking. The second film, in which we simulate his yearly speech to the students at Roxbury Latin School, shows a far more relaxed and self-assured presenter. There is no hesitation or uncertainty; Tim zooms quickly to his central themes, and then adds detail in a natural and offhanded, even humorous, tone. As a result, the listener truly feels the speaker, his humanity, and his passion.

4.15.2 Modularize rather than memorise

How did we evolve from the monotone, lifeless descriptions of 2002 to the authentic and engaging discourse of 2004? How were we able to get Tim to relax and not feel the need to memorise? The best answer I have is that we practiced repeatedly zooming around numerous "modules". By treating each vignette as a separate entity, and by regularly practicing "zooming the modules", we developed the building blocks for any speaking situation. By mid-2004, Tim was truly "liberated" from memorisation. As MFH board

member Dick Weisberg described after watching Tim address a golf tournament audience, it was Tim's best speech yet. He was truly "in the moment, as if he had forgotten about all the 'instructions' and just let himself speak from the heart." (Personal communication, October 18, 2004)

With respect to my coaching journey, it was through my work with Tim during this period that modularizing and zooming became pillars of my leadership and communication coaching. It had taken more than two years of work, but by the end of 2004, I watched as Tim was truly captivating his audiences. When I reflected back on how the transformation of Tim's communication style came about, I realized to what extent zooming was an integral element of the process. Zooming and modularizing, more than any other exercise, gave Tim the confidence to express his core beliefs with emotion.

4.16 DEVELOPING A "STORYTELLING FIRST" MINDSET, AND PRACTICING SLOW MANAGEMENT

During his career at CNN, Mark Walton came in contact with numerous individuals he considers "masterful influencers", including Ronald Reagan, GE's Jack Welch, Senate Majority Leader Howard Baker, Xerox CEO David Kearns, and CNN founder Ted Turner. What he discovered about these leaders is that they "approached every audience—whether in presentations to many millions or in one-on-one conversations—with a *story to tell.* (Walton, 2004 pp. 87-88)

Often, I have found that business executives spend considerable time preparing for large gatherings and formal speeches; the most effective speakers find and cultivate stories to tell in these group situations. However, these same leaders frequently neglect some of the storytelling opportunities of everyday life. As Walton, I have come to believe that true influencers have a story to tell to <u>every</u> audience. Therefore, I encourage clients to think "storytelling first", to focus all their discourse around their core stories of identity, whether the audience is large or small.

When I advocate using storytelling first, it is not to suggest that stories should supplant

logic and rational argument. In fact, the two types of discourse—reason-based and story-based—should complement each other. (Denning, 2001a p. xvii) What I do propose is that leaders develop a perspective that keeps them actively looking for opportunities to tell their stories of identity. In most situations, business communication would be vastly improved if leaders sought first to inspire with a compelling tale, and then to support it with logic and analysis.

In today's corporation, storytelling—"the single most powerful weapon in the leader's literary arsenal" according to Gardner—has come to be underutilized. Former White House speechwriter Daniel Pink explains that the modern world has come to devalue story-based communication: "As important as story has been throughout humanity, and as central as it remains to how we think, in the Information Age it got something of a bad rap...Stories amuse; facts illuminate. Stories divert; facts reveal. Stories are for cover; facts are for real." (Pink, 2006p. 102) In the insightful book, *A whole new mind: why right brainers will rule the future*, Pink advocates putting story back into business discourse, arguing that our "enlightened" society has pushed us too far in the direction of logical, rational interchanges. For Pink, the essence of persuasive communication is "the ability to fashion a compelling narrative." (op. cit. p. 66)

The inclination to think storytelling first, to rely on our core stories as the baseline of all our communication, is an instinct that must be developed. Once transformed into storytellers, however, leaders rarely go back to their previous methods. *Indeed, Tim Bilodeau's look back on his conversion to storytelling is quite revealing, and somewhat typical: "It took a while for me to be convinced. I felt that my audiences, whether groups or individual listeners, wanted to see the numbers and get the facts. I thought the statistics about child mortality, and the impact we were having on it, would tell their own story. What I realized was that people listened far more, and understood far better what MFH is about, when I told my personal story. When I discovered the power of this connection with my audience, the decision to base all my discourse around stories became an easy one. Now, I use every opportunity to get the story out...Telling the MFH "saga" is simply a part of what I do every day."* (January 3, 2006)

4.16.1 Storytelling and slow management

Often, the biggest missed opportunities for diffusing our stories are the ones in front of us every day—in our routine contact with individuals and workgroups. Particularly in today's fast-paced business world, I encourage executives to dedicate a percentage of their time each week to "slow management". With my clients, it is something I have simply become adamant about: Every week, we should schedule some time away from the meetings, phone calls and emails, time to truly engage colleagues, to listen, to teach and be taught. It is in these moments of relative tranquillity that we can share the stories that express our identity and build the bridges of understanding.

Certainly, I am far from alone in advocating this "slow management" concept. Over two decades ago, Peters and Waterman advocated MBWA, that is, "management by wandering around", calling it the best way to stay in touch with the company's employees and activities. At Hewlett-Packard, MBWA was a major tenet of company culture (Peters and Waterman, 1982 p. 122); managers were encouraged to be out of their offices working on building relationships, motivating, and spreading company values. (Kotelnikov, 2006) Maxwell urges leaders to "walk slowly through the halls", with the goal of connecting with co-workers, showing interest in what they do, listening to them, and engaging them in conversation. (Maxwell, 2005) Similarly, Simmons observes that simply taking the time to listen and understand others is the best way to create bonds with them, to build trust, and to share our stories. She explains that, in the busy modern world, "today's scarce resource, what you can truly give to others, is human attention." (Simmons, 2001 p. 191)

4.16.2 Slow management improves our storytelling

As we have seen, persuading with our stories is a powerful form of influence, but one that is difficult to master. I have often compared the process of developing storytelling prowess to that of learning a new athletic skill. With time and effort, we improve; through hard work and practice, we train our muscles to discover new behaviours. Walton has a similar approach to teaching the language of buy-in. As he states: "Communication is a contact sport. As with a new golf or tennis strategy, for example, mastering the 'language

of buy-in' requires an upfront investment of time and attention in order to adjust your thinking and behavioural 'muscles'". (Walton, 2004 p. 93)

Since communication is a contact sport, and since we become inspirational storytellers through practice, we can ill afford to ignore the daily opportunities to tell our stories—to all who will listen. As Denning describes in *Squirrel, Inc*, repetition is the one path to true improvement. (Denning, 2004c p. 30) Indeed, the most effective leaders I have observed or coached see slow management as an important form of storytelling practice.

4.16.3 Slow management deepens our connections

In recent years, much has been written about team building and team leadership. While the team concept is undoubtedly important, and the notion of leading a group should certainly merit our attention, my research and consulting work with teams and their leaders have led me to a somewhat surprising conclusion: In spite of our society's heightened interest in team dynamics, I have come to believe that the foundation of leadership lies in a leader's one-on-one relationships with key team members. In reality, leaders don't lead teams *per se*; they lead a set of <u>individuals</u> that make up a team. Supporting this point of view, Eric Matson stresses the importance of "leading individuals, not the group". As he elucidates: "Team leaders don't lead teams. They lead a collection of individuals who together make up a team… Leadership is a one-on-one sport." (Matson, 1997)

Indeed, the best way to lead a team is to focus on developing deep connections with individuals. In *Unnatural Leadership*, Dotlich and Cairo stress the importance of a leader's bonds with individuals. (Dotlich and Cairo, 2002) Military commanders and sports coaches have long understood this truth, and winning leaders in these arenas use one-on-one contact time to build trust and alignment. For example, Abrashoff, the renowned Navy war commander, feels that spending time with each crew member individually is the decisive factor in building a successful, unified team. (Abrashoff, 2003 p. 42) Celebrated USA Basketball coach Mike Krzyzewski also relies heavily on the bonds he forges with the individuals on his teams. As he describes: "Almost everything in leadership goes back to relationships…We lead people by understanding them [as individuals]." (Krzyzewski, 2001) Thus, Phil Jackson makes an effort to find personal gifts for his team members, as

his way of saying "I think I know who you are, I respect who you are, and I think I know what interests you." (Jackson and Rosen, 2001 p. 283)

Academics and business consultants echo the concept that one-to-one relationships form the base from which leaders lead. For example, Neuhauser states that, in any corporate change initiative, there is simply no substitute for engaging key individuals by taking the time to tell them the story, face-to-face. (Neuhauser, 1993a p. 145-6) In a 1998 article on the art of persuasion, Conger writes: "A persuader should make a concerted effort to meet one-on-one with all the key people he or she plans to persuade." (Conger, 1998 p. 89) For Goldsmith and Morgan, leadership is above all a "contact sport" where the leader's success depends largely on ongoing interaction and follow-up with co-workers. (Goldsmith and Morgan, 2004) Using a comparison to the theatre, Simmons advises leaders that "most of the action in your play for influence will occur when you are offstage." (Simmons, 2001 p. 141) In other words, daily interaction with individuals lays the groundwork for effective leadership; often, the leader's "offstage" contact with team members is far more important than his "onstage" performances.

If the basis for leading a team resides in the quality of the leader's one-on-one relationships with individuals, then one of the most important—and most neglected—contexts for storytelling is the individual teachable moment. As Nilesh Nanavati discovered, these quiet moments provide opportunities to connect, inspire, and align. Slow management puts us in the one-to-one situations where we engage in storytelling with our followers and co-workers. Once frustrated by the "dead" time spent travelling to client presentations, Nilesh came to see the time in a car or an airplane with a member of AFA's sales team as potential teachable moments. Instead of engaging in idle conversation, he began to take advantage of these opportunities to practice his stories—who I am, what we stand for, where we're going, etc. The stories he told on these occasions were often tales of shared mission, company values, his own values, or his vision for the future. During post-meeting travel, he gave feedback to the sales person on how well (or not) they had expressed the AFA story to the potential client, and engaged the sales person in a short brainstorming session about how to tell the story more effectively.

While speeches and presentations at the big events can be inspirational, it is in the small moments that we establish our best connections. A leader's "big" messages are credible only if he has used the "small and slow" moments to connect with individuals and earn

their trust. When we learn to use slow management and storytelling to connect with individuals, all forms of influence—including our speeches and formal presentations—have more impact, since the channels of communication and trust are wide open. (Simmons, 2001 pp. 116, 118) For important sales calls, as well, I advise employing storytelling and slow management. Whenever possible, one should arrange to meet potential clients "offstage", prior to the formal presentation.

In recent years, Tim Bilodeau has come to understand and utilize slow management with all his constituencies—donors, board members, partners, and employees. He now says that some of his most important moments of influence happen one-on-one, in the quiet, somewhat routine encounters of everyday life. As he explains: "Really, one of my best discoveries of the past few years was that every interaction, even the most mundane, is in fact an opportunity to inspire. Every meeting, every encounter, is an opportunity to teach. And, we inspire and teach best through our personal stories." (December 31, 2004)

4.16.4 Slow management reinforces our core messages

Jack Welch explains that getting any concept across to a group requires constant repetition of that concept. In spreading his stories to groups and individuals, GE's CEO always felt he "had to be over the top", telling his core stories so often he "almost gagged on the words." (Welch and Byrne, 2001 p. 109) Several students of leadership and change management advocate the sort of unrelenting behaviour Welch exhibited. Without constant reiteration, they say, a message of change will never come across to the listeners. Neuhauser (1993b) advises leaders to seek to become a "conditioned response" to the rest of the organisation. Similarly, Mattel CEO Robert Eckert's advice to business leaders is to "be a broken record...constantly communicating—in the elevator, in the cafeteria, on the street, on the phone, on planes...Talking to them once a quarter isn't enough—you have to repeat messages of direction, inspiration, and comfort daily, in a variety of forms." (Eckert, 2003 p. 44)

Chuck Martin, author of *Tough Management*, says that business managers plainly don't communicate their messages enough. Most often, he maintains, we tell our stories and think we have delivered the message to all. However, Martin advises listening to those around us, and even asking them directly what they heard. In almost all cases, he finds,

top managers who learn ask questions about what others have heard make an interesting discovery: they need to communicate *far more* than they ever thought. (Martin and NetLibrary Inc., 2005) Similarly, Kotter writes that many very smart people fall short as leaders, simply because they undercommunicate their messages of change, "without recognizing their error." To him, a fundamental difference between these unsuccessful change agents and the successful ones is that "change leaders don't let up." (Kotter and Cohen, 2002 pp. 4, 5)

Most leaders simply lack the discipline or the persistence to make this sort of relentless effort. As Jones et al. elucidate: "Too often, change leaders make the mistake of believing that others understand the issues, feel the need to change, and see the new direction as clearly as they do." The best change programs reinforce core messages through regular, timely advice that is both inspirational and practicable... Often this will require overcommunication through multiple, redundant channels." (Jones et al., 2004 p. 18 emphasis mine)

Clearly, slow management provides abundant opportunities for storytelling, for reiterating one's core messages, and for generating buy-in. It is often in everyday interaction that a leader wins people over, since it is in these quiet moments that leaders take the time to teach. As former US Secretary of State Henry Kissinger explains, teaching has long been one of the hallmarks of great leadership: "A great leader must be an educator, bridging the gap between the vision and the familiar." (Kissinger, 1994 p. 382) Cohen and Tichy also feel that teaching is an essential element of leadership, opining that "teaching is at the heart of leadership: It is through teaching that leaders lead." (Cohen and Tichy, 1998 p. 21) Further, they explain that the most important teaching does not happen in training rooms or formal settings; rather, the most effective teaching is done "in the course of their daily management of their companies...Good leaders never miss an opportunity to teach." (Cohen and Tichy, 1998, p. 24)

In recent years, my insistence that leaders schedule time for slow management, storytelling, and teaching has truly made a difference for clients. Indeed, numerous individuals have told me that the use of storytelling with slow management was one of the best lessons of our coaching sessions. While the delivering of inspirational messages to large audiences may be more dramatic, it is often in small daily encounters that they win people over. Consciously combining slow management and storytelling provides leaders

with opportunities to become teachers in their organisations. Today Tim Bilodeau speaks of using every possible venue to teach about his work with MFH, much as Jack Welch did at GE. As he states: "One of the things I have come to realize is that I am at my best, and I have the most influence when I take the time to listen and teach. In the daily rush to get things done, it is not always easy to remind myself that I need to slow down and connect. But storytelling and teaching really are what work best, whether with donors, partners, employees, or board members." (August 29, 2006)

4.17 AVOIDING DANGERS AND PITFALLS

Storytelling is not a panacea, and using storytelling in leadership communication is certainly not without its pitfalls. While we have warned of concerns and dangers in other sections (for example, not focusing enough on individual teachable moments, not personalizing adequately, telling stories that are overly complex), we review some them in this chapter, and highlight a few new ones.

Often, navigating the pitfalls involves achieving balance in one's storytelling. For example, one must avoid the trap of under personalization, of telling leadership stories that are too bland and distant. On the other hand, we will explain that there are also dangers in over personalizing one's communication. Similarly, stories of identity can lose effectiveness by flooding listeners with an overabundance of detail. However, a healthy level of anecdotal detail makes a leader's stories more down to earth, friendly and credible. The only way to learn to steer through these pitfalls, to learn to manage the subtle requirements of effective storytelling, is through practice.

In the numbered points below, I underscore some of the most significant obstacles to becoming an inspirational communicator. While certainly not an exhaustive discussion, I seek to point out a number of important lessons from my coaching work with leaders during the past eight years.

4.17.1 Not staying on the path long enough

To me, the biggest obstacle to learning inspirational leadership communication is simply stopping the process too soon, or not continuing to progress after formal coaching ends. I say this is a problem "to me", because clients usually do not see it this way. In almost all instances, they make noteworthy progress, think they have mastered most or all the important concepts, and are thus content with their coach and with their new-found skill in self-expression. I, however, often know they can go far further.

While I invariably see the benefits of the coaching procedure on a leader's behaviour and communication skills during the contract training period, it is sometimes disappointing to see them "in action" years after our association ends. For example, observing Nilesh Nanavati address the AFA board of directors in October 2006, some two years after our coaching arrangement terminated, I see that some of the elements we worked so diligently to modify—the fact-based approach, the monotone pitch, and the under-confident demeanour—have crept back in to his discourse. While still a far more effective communicator than in 2002, he has not progressed since July 2004, and has even slipped a bit backwards.

As I often articulate to various audiences—clients, students, corporate teams, or industry conferences—leadership communication is simply hard work. If it were easy, we would all be dazzling presenters, orators, and leaders. Those who do become great communicators have worked at it, and indeed worked at it a lot. Winston Churchill, considered by many to be one the greatest speakers of modern times (Best, 2001, Gilbert, 1991, Jenkins, 2001) prepared compulsively, repeating them "over and over...He thought out every sentence very carefully and rehearsed it and practiced it." (Brown, 2004)

In fact, achieving greatness in business leadership, or in leadership communication, appears to be little different than achieving greatness in any field. Whatever the domain may be—music, science, surgery, sport, management, or communication—the root of great performance is an obsessive attention to improving one's skills. The evidence, scientific as well as anecdotal, seems overwhelmingly in favour of "deliberate practice" as the source of great performance. (Colvin, 2006)

Storytelling, particularly, is an ability that must be honed and maintained, and the literature

about using storytelling to persuade others is replete with references to the difficulty of the task. (Ready, 2002 p. 65, McKee, 2003 p. 6) Whenever experienced storytellers and communication specialists advise us about how to improve, the "practice, practice, practice" mantra comes back consistently. (Denning, 2004c, Carlson, 2005, Lipman, 1995, 1999)

Since in some cases, the initial stages can feel quite natural and unproblematic, leaders may not see this entire storytelling undertaking as serious work. (Lipman, 1999 p. 11) *Even in "star pupil" Tim Bilodeau's case, his practice is sometimes not as deliberate as I would like. While the "storytelling first" mentality is firmly entrenched, and he uses autobiographical anecdotes to great effect, I feel that he can go further with his stories of engagement and greater purpose. He often tells me, only half-jokingly, that he is "knocking audiences dead" with his talks, but I know he can still improve his call to action, through ongoing deliberate practice. (And, he knows it too!) While I am sure he is capable of knocking 'em dead, and I have indeed seen him do it on occasion, I remind him that a leader's discourse needs constant renewal.*

4.17.2 Later stage and post-coaching pitfalls

As a coaching relationship winds down, or when coaching sessions become less frequent, we lose the structure that has ensured attention to self-exploration and practice in self-expression. Both leader and coach should be aware of several pitfalls specific to such periods of transition. In the absence of formal structure, there is danger that the leader may (1) fail to carve out time for reflection, (2) simply neglect to tell the core stories often enough, or (3) become unnatural and scripted in his storytelling.

Reflection: During the past few years, I have come to see "encouraging reflection" as one of my central functions as a coach, for a straightforward reason. Whether with my own clients or with leaders I have studied and observed, I have concluded that the most effective ones spend substantial time in thought, in learning about the world and reformulating their worldviews. The busiest ones carve this time into their schedules; they find innovative ways to put reflective time on the weekly agenda. As described by Kirsner in a *Fast Company* article, GE's Jeff Immelt sees continuous reflection as a crucial element of a leader's development, and he embodies this concept in his daily behaviour, setting

aside 20% of his time for thinking and reconceptualising." (Kirsner, 2004 p. 32) It is not only important the leader enjoy this sort of reflection; one must also have the self-discipline necessary to keep reflective time on one's agenda.

Repetition: One of the advantages of regular coaching sessions is that they serve as reminders to the leader, keeping storytelling top of mind, and stressing the power of leading with one's voice. My experience with clients has shown that most leaders need this regular prodding, since they tend to underestimate the number of times a message must be repeated before it will truly "stick" with the followers. Two Swedish academics promote the concept that true leaders must become CSOs—*Chief Storytelling Officers!*—since telling the stories, and constantly re-stating them, is the best way to create a sense of purpose and a shared understanding of what the company stands for. (Ridderstrale and Nordstrom, 2000 p. 190) Thus, after leaving a coaching relationship, I make a point of staying in touch with the client for at least two years, calling periodically with my reminder question: "How is the CSO's work progressing?"

Renewal: Another of my central tasks as coach is making sure the client's core stories stay alive and fresh, that they do not become static as a result of multiple retellings. As Walsh warns in *The Art of storytelling* (p. 27), a storyteller can lose the audience by sounding too polished; a speaker certainly does not want to leave the impression that the stories are recited from memory. The only solution to sounding spontaneous—to finding and keeping one's natural and comfortable voice—is continuous practice. (Walsh, 2003 p. 27) The paradox is that in order to appear natural, we have to prepare. In fact, the most effective speakers seem both prepared and natural at the same time. (Denning, 2005 p.36, Lipman, 1999 p. 85)

For stories to stay lively, the client must learn to speak with a sense of renewal, to experience the original emotion again with each telling. Telling a personal story with feeling means reliving the emotion; the storyteller "feels" it over again, along with the audience. As Denning explains, "because the story is fresh each time for the storyteller, it's also fresh for the audience." (Denning, 2005 p. 36) Without this sense of renewal, without the capacity to relive the emotion over again, stories lose their energy, and speeches can become dry, distant, and seemingly scripted.

A key passage for Tim Bilodeau was re-discovering the emotion he felt in the Greek Jail, or the feeling of his first conversation with Father Frank Smith, and learning to put that

emotion into his storytelling. As we have seen, until mid-2004 Tim's self-consciousness as a speaker was preventing him from reliving the moment of the story, making him sound overly scripted, and even unauthentic. He had a tendency to cling to predefined structures in his mind, to read from notes or lists, and to be unduly concerned with including every detail from his planned speech. When he learned to let go of his fears about leaving out detail, when he was able to throw away his notes and memorised passages, when he began to just let the stories flow, he put himself on the road to becoming an effective orator. Most importantly, when he learned to relive the emotion of each story, he began to truly connect with his listeners.

4.17.3 Pushing storytelling too far

Kouzes and Posner warn that "every leadership virtue taken to excess can become a vice", (Kouzes and Posner, 2006 p. 133) and storytelling is certainly no exception. As discussed previously, I certainly do not want to give the impression that I see storytelling as the only way to express oneself as a leader. Rather, through my coaching and study, I have come to view it as an underutilized form of communication that leaders should explore fully. Over the past decade, I have become increasingly convinced that it is the single best way to connect with other human beings. However, like any concept or tool, storytelling can be over utilized. In this section, we address some of the dangers of simply pushing too far.

Any storyteller should keep in mind that for much of society, the term "storytelling" itself can have negative implications. The expression "telling stories" is often employed with the connotation of stretching the truth. Since the Enlightenment of the 17th century, storytelling has been suspect as a means of communication, in a society where science and reason predominate. (Denning, 2001a p. xv) In fact, classical French author, Jean de la Bruyère (1645-1696) is famous for saying that "one mark of a second-rate mind is to be always telling stories." (De La Bruyère, 2006) As Metzger explains, whether bending the truth is intentional or not, stories may become distorted in numerous ways. (Metzger, 2000)

Despite these remarks about storytelling's sometimes bad image in a world of scientific reason, we have seen clearly that a leader's autobiographical stories are among the most powerful tools for inspirational communication. Thus, we must be cognizant of traps

that a Chief Storytelling Officer might fall into. When I allude to "pushing storytelling too far", it is to caution of a danger that does exist: if a leader's stories become too long, self-centred, manipulative, truth-bending, or preacher-like, they may do more harm than good.

Stories that are too long: A leader certainly does not want the reputation of giving rambling anecdotal explanations or answers to questions, in situations where a short answer would suffice. As we have emphasized throughout, effective leadership stories are personal, authentic, clear and direct. For the leader, the trick is finding the balance—personalization and anecdotal detail lend credibility, but extraneous detail and long-winded renditions are tiresome. Keep things short and simple, and prune out extraneous detail. As Denning advises: "Strip the story of *unnecessary* detail." (Denning, 2004c p. 17, emphasis mine)

Self-centred stories: Though I have made an unequivocal case in favour of personalization, a leader's personal stories must avoid the trap of excess. Stories should be personal, not self-absorbed; leaders must never forget that their focal point is the audience, not the speaker. When one crosses the line and pushes personalization too far, when the focus becomes the teller rather than the listeners, the stories will quickly be perceived as self-centred, self-indulgent, or self-promoting. (Gardner and Avolio, 1998 p. 45)

A certain dose of self-promotion in the leader's discourse is beneficial, since part of being an inspirational leader is the ability to sell oneself and one's ideas. However, a leader "must moderate the degree of self-promotion in which he or she engages in order to avoid the 'self-promoter's paradox'" (Harvey, 2001 p. 257), a situation where the leader's credibility can be diminished by the telling of self-aggrandizing stories. Similarly, Jones and Pittman (1982) warn that overstatement and exaggerated self-promotion of the leader can lead to doubt among listeners, since capable people tend to understate their competence. Supporting the argument that self-indulgent stories may undermine the leader's integrity is the research of Collins (2001a), who finds that the most competent and effective leaders tend to minimize their own importance. From my perspective, the most eloquent communicators are those who do not hesitate to tell their personalized tales, but they tell them in a modest and unassuming style. Tim Bilodeau, for example, has learned to tell exceedingly personal stories, but always with humility, and even with a dose of self-deprecating humour.

Authenticity, truth, exaggeration, and manipulation: While storytelling and impression management are powerful communication tools, the literature warns that there can be a fine line between impression management and manipulation. On the one hand, the immortal French statesman Charles De Gaulle states that "the great leaders have always stage-managed their effects." (Anderson, 1997 p. 95) On the other hand, Goffman sees a moral problem, writing of "the amoral issue of engineering a convincing impression." (Goffman, 1959 p. 243) Though Burns' (Burns, 1978) classic descriptions of charismatic leadership tend to emphasize the positive, calling it "heroic", others have a more balanced view, recognizing that there is a "glow" but also a shadowy "dark side" to charisma. (Conger and Kanungo, 1998, Lord and Maher, 1993, Harvey, 2001) Indeed, Yukl affirms that charismatic leadership research tends to emphasize the positive and underplay the negative, and he cites examples of the manipulative conduct leaders may engage in, such as: "exaggerating positive achievements and taking unwarranted credit for achievements", "covering up mistakes and failures", or "blaming others for mistakes." (Yukl, 1999 p. 296)

As symbolic forms of management, a leader's stories are powerful and potentially dangerous tools. (Martin and Powers, 1983b p. 104) Indeed, history and politics provide illustrations of various sorts of manipulation and abuse of power, often using stories and impression management in the process. The example of Adolf Hitler, whose brilliantly crafted speeches intertwined personal stories with symbolic tales from German mythology, demonstrates how a master storyteller can cross over to the manipulative, dark side of charisma. (Davis, 2005 p. 8)

Clearly, Hitler is an extreme case and an intriguing study in charisma's dark side—particularly in the use of storytelling to manipulate on a grand scale. Fortunately, though, in today's organisations, attempts to control and manipulate rarely succeed. When stories become manipulative, workers will tend to supplant the official versions of the "script writers", replacing them with cynical counter-stories of their own. (De Certeau, 1984 p. xiii) On a similar theme, Gabriel writes of the often unenthusiastic reactions to company leadership's "officially sponsored myths" and "cultural assaults", noting that employees will tend to resist them by developing their own sub-cultures that challenge or ridicule the organisation's sponsored shibboleths. (Gabriel, 1995 pp. 478-9) Neuhauser, as well, cautions that when leaders' stories become "corporate propaganda", they are usually identified by workers as attempts to manipulate. (Neuhauser, 1993a pp. 56-63)

Tension between authenticity and impression management

Since leaders and storytellers craft the impressions they seek to project, some tension may exist between projecting a positive image and telling the truth. For example, in her discussion of drama and charismatic leadership, Harvey writes of the "dialectic between morality and performance" or of the "dilemmas and tensions in this self-presentational process." (Harvey, 2001 p. 255) Recognizing this tension and the risk of falling into manipulation, Jones and Pittman describe the push and pull between authenticity and impression management. In their desire to be completely "true" but also to project a favourable impression, an individual leader must "decide on the best strategic combination in his dealings with others." (Jones and Pittman, 1982 p. 237)

By its very nature, personal storytelling is revisionist. (Sadowsky, 2002b, Choy, 1998 p. 95) Gandhi's reflections on autobiography make the clear case that no individual exists in a realm of perfect recall, that one is constantly selecting what detail to include or to omit, continuously searching, "experimenting" with truth, perhaps exaggerating (even involuntarily), and certainly not restating an exact or objective "truth" in its entirety. (Gandhi, 1982 pp. 257-8) In other words, when managing the impressions we seek to project to others, there is a natural inclination to exaggerate or embellish our successes while minimizing or playing down our failures. Particularly when storytelling is the mode of communication, we often sacrifice truth to meaning, amplifying our images to make a point. As Gabriel describes, "In telling a story, the requirements of accuracy and veracity are relaxed in the interest of making a point. Poetic license is the prerogative of storytelling...Stories are emotionally and symbolically charged narratives; they do not present information or facts about 'events', but they enrich, enhance and infuse facts with meaning." (Gabriel, 1998 p. 136)

At the organisational level, as well, the truth of a story is sometimes bent or stretched, particularly when the tale takes on mythical proportions. In an in-depth study of storytelling at the Hewlett-Packard, Nymark found that some of the classic stories of H-P lore were in fact apocryphal. (Nymark, 2000) H-P legend is replete with tales from the company's beginnings, the "stories of Bill and Dave" (the founders). Today, nobody is completely sure of the specific detail of a given tale, or even if it actually took place in the form legend would have us believe. At times in a company's history, these stories take on a life of their own, and resonate throughout the workforce, not due to their historical

correctness, but because their message is consistent with the corporate culture, and with the leaders' behaviour. (Schwartz et al., 1998, Peters, 1978) In such mythic stories of leadership, the underlying theme and message matter, not the "facts".

While impression management, self-serving selection, and exaggeration may be inevitable human tendencies, a leader must be careful not to damage trust with followers by blatantly bending the truth. (Gardner, 1999 p. 23) In such cases, no matter how charismatic the leader, or how impressive the storyteller, trust with the followers can be lost, or at least compromised. For James O'Toole of the University of Southern California, author of *Leading Change*, trust is indeed the very heart of leadership. (O'Toole, 1995 p. xvii) Top leaders from the field echo O'Toole's sentiment. One such executive is Jim Burke, former Chairman and CEO of Johnson & Johnson, who states categorically that "you can't have success without trust," (Covey and Merrill, 2006 p. 6) and that "nothing good happens without trust. With it you can overcome all sorts of obstacles." (Burke, 2003) Current General Electric CEO Jeff Immelt concurs, proclaiming that "the best thing you can give as a leader is a reason to trust." (Immelt, 2004)

If building trust is to be one of the leader's primary concerns, what issues do impression management and storytelling engender? Gandhi's remarks about experimenting with truth stimulate some essential questions about leadership communication and the managing of one's image: What is truth, what is acceptable exaggeration, what constitutes bending the truth, how much bending is "permissible", and when does *engineering* a convincing impression become a moral issue? These are large subjects, far too big to treat in any depth here, and certainly not the subject of this dissertation. Rather than provide answers, or take a moral stand, my goal in this section is to point out the possible dangers, and to outline my own approach to these matters in the two points I discuss below.

First and foremost, in all my work with clients, I stress authenticity. As we have seen, impression management can border on manipulation, and it is important not to cross that line. While leaders should manage the images they wish to project, I draw the line at using storytelling and impression management to engineer an image that is in any way fake or unauthentic. And, leaders must always embody the stories of identity they tell. When employees become sceptical because they sense a difference between their leadership's words and actions, the "official" stories of a leader may do more harm than good.

If my first crucial point for clients is about authenticity, the second one concerns listening. In her discussion of leadership as a "charismatic drama", Harvey states that effective leaders will use impression management to project their desired identity images to their audience. (Harvey, 2001 p. 256, Gardner and Avolio, 1998) These desired images will only resonate with followers if they succeed at implicating the followers' self-concepts. (Shamir et al., 1993, Shamir et al., 1994) In other words, followers identify with a leader if the leader's projected images are images of shared identity and values. Thus, to ensure the followers' active engagement in the "collective drama", the leader's discourse must be congruent with the followers' interpretations of their own "empirical, experiential and cultural realities." (Benford and Hunt, 1992 p. 49)

Zealotism and preaching

As we have seen, storytelling requires patience, in introspection and self-discovery, as well as in the telling. First, leaders must have the patience to find and construct effective stories through introspection and practice. Then, they must have the patience not to "preach" or "push" stories on others. An effective leader uses stories to plant seeds in the listeners' minds, brings others in as protagonists and storytellers, and then lets the stories grow in the organisation. (Simmons, 2001 p. 142)

Thus, another way one can push storytelling too far is by preaching to the audience. When leaders are impatient or self-centred, they often do not take the time to allow the stories to grow in the minds of their listeners. Instead, they may attempt to push their stories onto the followers rather than patiently bringing listeners in with true stories of inspiration and engagement. Simmons makes this point with images, saying that any use of story must be "a pull strategy—more like a powerful magnet than a bulldozer." (Simmons, 2001 p. 108) In cases where a leader tries the bulldozer method, listeners often tune out, as they come to view this approach as zealotism and proselytizing, or further attempts to control them.

In *The Dance of Change*, Senge recounts a story that illustrates the pitfall of preaching and zealotism. When a production team at an oil refinery reoriented their plant's operations around continuous learning, they made tremendous leaps forward—in cost savings, as well as in morale and commitment of the participants. When the leaders of the initiative attempted to share their lessons, and their enthusiasm, in other parts of the company, they met with resistance. According to Senge, the problem was one of excess zealotism. While

other groups within the organisation found the stories interesting, they complained of having to sit through meetings with a band of "missionaries". (Senge, 1999 p. 319)

Consequently, a storytelling leader must guard against the dangers of zealotism and fanaticism, as people do not like to be lectured. (Armstrong, 1992, Hoffer, 1989 p. 156) In other words, when stories are powerful and meaningful, it is dangerous for a leader to think that he has the "right" way or the only way, and to stop listening to others. As in the case of Senge's "missionaries", preaching and overzealous storytelling can create distance and resentment with an audience.

4.17.4 Failure to personalize

In *Crossing the Unknown Sea: Work as a Pilgrimage of Identity*, David Whyte remarks that "the great question of leadership, about taking real steps on the pilgrim's path, is the great question of any individual life: how to make everything more personal." (Whyte, 2001 p. 55) This observation about leadership in general echoes my most frequent advice to clients about improving their communication: Make it more personal!

Near the beginning of this document, I discussed the concept that there is often reluctance in our society to speak truly from the heart, with emotion. Simmons develops this idea at some length, wondering why people "hold back" when making presentations. Since most presenter "play it safe", their delivery becomes "uptight, clinical, emotionless, and boring." (Simmons, 2001 p. 151) When Gaulke asks her audiences what they like best in speakers, people point to the speaker's passion. So, she advises anyone making a presentation not speak from the heart and not to hold back. (Gaulke, 1997 p. 81)

Tim Bilodeau is a fine example of a speaker who has learned to personalize and to speak from the heart, while remaining true to his low-key, non-charismatic personality. As we saw, Tim's early presentations and stories were replete with vague, impersonal statements, or with references to numbers and statistics. It took a good deal of coaching to get him to evoke true expressions of how it feels to do this work. Today, he truly speaks from the heart, taking the listener into the world of feeling, and he has become a persuasive and inspirational orator.

To me, the subtle pressure from business society to conform to standard presentation tools and procedures, rather than tell personal stories with passion, has rendered most speeches boring and dry. As I final thought, however, and so as not to contradict other arguments in this document, I should caution that personalization is yet another question of balance. We want the listeners to feel the passion in the story, not the speaker's self-promotion or fanaticism. Personalize to the point of expressing emotions and passion—authentic and never staged—that are consistent with the speaker's personality.

4.17.5 Insufficient anecdotal detail

While it may sound like a paradoxical assertion, my experience with storytelling in coaching has convinced me of a basic truth: The more a story is specific in its detailed descriptions, the more it will be generalized. Simmons has arrived at a similar conclusion, as she writes: "a counterintuitive secret that all good storytellers understand is that the more specific the story, the more universal the connections." (Simmons, 2001 p. 123) According to Denning, this phenomenon is true because a specific story, replete with vivid detail, is more believable and more likely to generate a story in the mind of the listener. (Sadowsky, 2001a) Gaulke advises corporate presenters to "fill your stories with vivid descriptions, real locations, and people's names. Give them lots of colour and life." (Gaulke, 1997 p. 42)

Not only do detailed stories stimulate universal connections, research has shown that they are remembered more readily by listeners. (Martin et al., 1979, Wilkins, 1983 p. 89) *Thus, when Tim Bilodeau tells us to "pack our bags" and come along with him to an MFH site in Haiti or Bolivia "in our minds", his vivid descriptions cause us to travel vicariously, to create pictures in our minds, and to recall the story later.*

Since the concept of providing sufficient detail may seem in contradiction with the notion of simplifying our stories, I make the distinction with my clients in the following manner: First, we simplify by always sticking closely to a few major themes. We try to remove *thematic* complication and *technical* complexity out of the story, or out of any part of the presentation for that matter. At the same time, we seek to add the *anecdotal* detail that will bridge distance with an audience and increase the speaker's credibility.

4.17.6 Failure at inclusion

My coaching is about *inspirational* leadership communication, and one *sine qua non* of inspiration is inclusion. Without including others, the leader's stories will often receive a cynical response. In that light, one of the dangers we must be conscious of is that it is possible for a leader to become a more accomplished communicator—and an effective storyteller—but still fail at inclusion, engagement, and calls to action.

Neuhauser warns that the biggest danger of an "us vs. them" state of mind developing may be in start-ups—the young companies where the founders often share a special bond. In some cases, as the company begins to grow, the original cast does not let the newcomers in to the shared stories, which then become the stories of a select few insiders. As she describes: "You end up with two tiers of storytelling in the organisation... [The leaders] are having their own small tribal campfire...they just forgot to invite the rest of the tribe." (Neuhauser, 1993a pp. 59-60) Since the top managers are the ones who do share in the stories, they are often not aware that this phenomenon of "leadership isolation" exists, or that unhealthy subcultures are developing lower in the organisation.

At Emailvision, Nick Heys and his leadership team experienced some leadership isolation in the early days. During the year 2000, Nick was improving considerably as an inspirational storyteller, but at times he was not bringing the entire organisation into his stories. When he evaluated our coaching activities over the period from 2000 to 2003, and his progress during those years, he was quite positive concerning his improvement as a communicator, particularly his new-found ability to engage listeners with his personal stories of identity. He regretted, however, that he was not always able to connect to a wider employee audience. (Personal communication, June 16, 2004)

The phenomenon of poor alignment between the stories of leaders and those of other employee groups can be cause for concern at larger, more established companies as well. Wherever leaders are not successful at including all constituencies in the overall organisational stories, sub-cultures with their counter-stories will develop. Such was the case in an intriguing storytelling study by Hansen, Kahnweiler, and Wilensky (1994), in which the authors collected data from human resource department (HRD) professionals employed by Fortune 500 companies. Their findings indicated clearly that HRD groups frequently have their own goals and plans, and that their stories are often not fully aligned

with overall corporate agendas.

In any organisation and at any level, an inspirational leader must come to understand not only storytelling, but inclusion as well. The most effective leaders provide a sense of shared undertaking; their stories ignite dreams in the minds of listeners. Organisational stories of identity must be inclusive of everyone, or silos and sub-cultures will grow within the company. As Gabriel states, effective storytelling can magnify the positive or the negative aspects of a corporate culture: "Storytelling is positive when organisations are aligned and all telling consistent stories. When there is political infighting or turf wars, use of storytelling can magnify the divisions." (Gabriel, 1995 p. 482)

In my work with clients, I have often found that the call to action and the inclusion in a shared dream are the most difficult elements of my coaching methodology to master. For example, Tim Bilodeau has truly become an interesting and inspiring speaker. Many people find Tim's personal stories fascinating; time and again, they are deeply moved in encounters with him. If there is anything lacking in Tim's discourse, an aspect that Tim has struggled with, it is providing a stronger and more direct call to action. Today, we are practicing adapting the end of his speeches to specific constituencies, around the theme, "Some of you have asked how you might help. Here are some specific suggestions, ways you might want to think about joining us in our dream of erasing needless child mortality in the world."

4.17.7 Failure to embody

Harvard psychologist Howard Gardner sees organisations as battlefields where numerous stories compete for survival. "There are many stories around," he writes, "and they compete with each other in a Darwinian way." (Gardner, 1999) In this environment, where various stories vie for the hearts and minds of the listeners throughout a company, the leader's stories must, above all else, be credible and authentic.

Authenticity results when one truly embodies one's stories, when there is little or no divergence between one's words and actions. (George and Bennis, 2003, Gardner and Laskin, 1995, Pearce, 1995) As Gardner (1999) explains, "The best measure of embodiment is the kind of life that the leader leads and the kinds of things that he does on

a daily basis. If the story and the embodiment are more or less consonant with one another, then the leadership proceeds well. If, however, he tells Story A but leads Life B, then the story is basically a hypocritical one, and the leadership is difficult to sustain." In Pearce's view, as well, discrepancies between the words and deed of top managers lead to disaster. He says that whenever "there is a lack of congruence between the stories and the company values, you're dead." (Warfel, 2002)

For example, Gardner compares Margaret Thatcher to Bill Clinton, and he concludes simply that she is a credible leader while he is not. The reason is simple: the Iron Lady truly embodied her stories, while the American president failed to do so. (Gardner, 2004 p. 80) Another example that shows the dangers of non-embodiment happened at IBM, as told by Martin & Powers. (1983b) When Tom Watson Jr. took over as CEO, he told employees that he would welcome an attitude of "wild ducks", to bring fresh thinking into the company. Though this new concept was presented quite effectively, as a story with vivid images, most employees came to dismiss this tale as corporate propaganda. In reality, the corporate culture emphasized conformity to such an extent that any "wild duck" behaviour found scant acceptance, and Watson's novel policy proved to be more rhetoric than reality.

As such, failure to embody one's stories is quite a dangerous pitfall. As I tell client again and again, stories must be simple, clear, and credible. And, you should only tell stories you are sure to embody!

4.18 MAKE IT A LIFELONG JOURNEY

Once the storytelling mindset is there, discovering stories, reworking stories, and communicating through them, becomes a lifelong endeavour. Our three primary goals—truly knowing yourself, expressing yourself, and leading with your autobiographical stories of identity—are the basis for all effective leadership communication.

4.18.1 Lifelong reflection

My coaching experiences, and my study of leadership during the past decade, have led me to the belief that the most effective leaders view the journey to self-knowledge and self-expression as a lifelong work in progress. The concept that leaders learn, teach and evolve during an entire lifetime is echoed in the leadership literature. For example, in his seminal work, *On Leadership* (1990), John Gardner emphasizes that leadership is an ever-evolving learned skill. Goffee and Jones (2000, 2006) tell us that leadership is hard work, and the ones who succeed at it are those "willing to dig deeply into their true selves." (Goffee and Jones, 2000 p. 63) Similarly, Rooke and Torbert write that the leader's voyage of development is not an easy one, and that those who succeed on this difficult road are the ones who continue the quest for self-knowledge. In their words: "Those who are willing to work at developing themselves and becoming more self-aware can almost certainly evolve over time into truly transformational leaders." (Rooke and Torbert, 2005 p. 76) For Marinoff, as well, a leader examines life and self continuously, striving for continuous self-improvement. (Marinoff, 1999 p. 11)

Lifelong learning about oneself is the base element of all successful leadership. Pearce writes that authenticity "arises out of a discipline of self-discovery and self-expression and seems to be a lifetime process, even for spiritual teachers who practice authenticity as a life's work and who spend much of their lives in solitude." (Pearce, 1995 p. 24) Tichy (1997) says that this is a lifelong exercise—that the most effective leaders are great teachers because they are great learners, particularly about themselves. Perhaps it is Bennis who expresses the ongoing self-exploration concept best when he states that "understanding comes from becoming your own best teacher, from ongoing reflection and self-invention, from having an ongoing Socratic dialogue with yourself." (Bennis, 1994 p. 54)

4.18.2 Revisiting and telling autobiographical stories

Leaders revisit their autobiographies continuously, since authentic life stories are simply the best source of leadership material, of tales and examples that illustrate the leader's true nature. And, not only do they strive to make this introspection a lifelong endeavour, they actively take advantage of the numerous opportunities to practice telling their stories. As Ibarra and Lineback suggest, "You can practice your stories in many ways and places. (Ibarra and Lineback, 2005 p. 71) Simmons advises ongoing and continuous practice, since mastery of self-knowledge and storytelling is difficult. As she says, "only daily practice can achieve this level of deep learning." (Simmons, 2001 p. 234)

Revisiting and retelling of stories are crucial for two reasons. First, stories grow through contact with others. Story creation and story telling are iterative processes, and processes that happen not in isolation but in interaction with others. Second, the act of telling our stories over and over allows for the symbiotic co-creation to happen between story and storyteller. As we have seen, leaders create stories, and stories in turn help create leaders. Walton reminds us that "a well-designed strategic story can literally reshape the storyteller, too!" (Walton, 2004 p. 56)

4.18.3 Tim Bilodeau's lifelong journey

Tim's growth as an inspirational leader and communicator is far from finished. During the past few years, he has learnt to express fully himself through his authentic autobiographical stories. Today, his speeches and presentations take the form of vignettes about his past, his core beliefs, his experiences with Medicines for Humanity—he brings to life some of the remarkable people, places and events he has seen as he has traveled the world for his work—and his vision for the future of the organisation.

Tim gained a great deal of confidence as he became an effective storyteller and came to believe increasingly in the stories he told, as if the previously untapped stories of his past and his values were unexploited wells of courage and enthusiasm. I need to stress

again that his stories were always authentic; they existed somewhere inside him and were true to his character. Nor are his conviction and passion in any way fabricated—they also existed inside of him. Importantly, though, it was often the act of telling his stories, of making them come alive, that taught him about himself, clarified his true beliefs, and brought his passion to the surface. He then drew strength from this clarity and this passion; every day he gains in confidence and conviction.

When I started working with him, Tim's vision was about creating an organisation that could have a small impact on the global problem of needless child mortality. Over a period of several years, the story evolved into one of having numerous sites around the globe, with regional directors leading major outreach efforts and making a significant impact in the world, of building a world-class organisation. For me, the most profound and interesting lesson is this: It is his stories and his newfound storytelling skill that he found a confident voice. Then, as he told his stories over and over, and heard them in his mind, the stories gave him the increasingly firm conviction that he could go further. Each time he created and told a story, the story was simultaneously creating him, pushing him to reach a higher level. As I have seen the effect this work has had on Tim over for the past several years, I am confident his growth as a leader and communicator will continue as Medicines for Humanity moves forward.

4.19 EVALUATING THE LEADER'S PROGRESS

As portrayed throughout Chapter 4 of this document, feedback and evaluation are an integral part—and an ongoing element—of the coaching process. We have seen the importance of three sources of constructive criticism: the impressions of the leader himself, the observations of the coach, and the comments—formal and informal—of the employees closest to the leader. The following table, "Evaluation of the coaching process" summarizes, in concise form, the sources of assessment and triangulation described in the text of the chapter.

Table: ***EVALUATION OF THE COACHING PROCESS***

Start of coaching relationship	COACHING AGREEMENT	Leader and coach agree to start the coaching process	Am I ready to buy into the course of action ?	Is there a true willingness to engage in introspection and self-knowledge ?	
Journey inward to self - knowledge	WHO I AM	Leader comes to know the source of his own strongest convictions	Are feelings from the past brought back with emotion and immediacy?	Are we finding the themes and core beliefs central to the leader‘s identity?	
	WHY I DO WHAT I DO		Do the core principles that drive me come out clearly?	Does the leader reconnect with the turning points in his life, and with his values ?	
Journey outward to self-expression	START STORY-TELLING	Leader increases the involvement of others to higher levels	Can I mobilize others with my stories?	Do the leader‘s personal stories establish his credibility?	Does the leader create energy and inspiration for the listener?
	SIMPLIFY, LET GO	Leader is using the “why I do what I do‘ model as unifying concept to organise his thoughts Leader can speak without crutches (notes, slides, memos, PowerPoint)	Can I create clear links between my stories, my core beliefs and the values of my organisation?	Is the leader gaining confidence in his leadership story-line? Does he connect and take ownership of his audience?	Is the new way of speaking perceived and appreciated? Are others noting an increase in the leader's self-confidence?
	YOU'RE YOUR STAFF INTO STORY-TELLERS	Provide the space and framework for upper managers to construct their own stories	Do members of staff get encouraged and start sharing elements of their own personal tales?	Does the leader‘s staff personalize the stories and carry them to the world?	Does the leader‘s staff feel that the leader has encouraged them to tell their own stories?
Engaging the listeners: the call to action	STORIES OF ENGAGEMENT	Leader brings the involvement of others to higher levels	Do I feel the audience engaging?	Is there a clear call to action? Is the audience responding?	Is the leader becoming more inspirational to the key players?
Phases of the process, and the type of evaluation		*Change of attitude or behaviour sought*	*Evaluation by the leader himself*	*Evaluation by coach*	*Evaluation by leader‘s staff*
			internal evaluation	*external evaluation*	

5. FURTHER CASE STUDIES

This chapter consists of two additional cases studies. As we followed Tim Bilodeau through the steps of the coaching process in Chapter 4, I present the cases of Nilesh Nanavati and Nick Heys in similar format.

5.1 CASE STUDY: NILESH NANAVATI AT AFA

This case study covers the period during which Nilesh Nanavati served as CEO of AFA, from October 2002 to July 2004. Rather than give a sequential description of our work together, and of Nilesh's progress, I will focus closely on the elements of the coaching process, as outlined in chapter 4. I feel that this thematic recounting will demonstrate Nilesh's development more effectively than a strictly chronological description.

The Company

Advanced Financial Applications (AFA) was founded by Shams Karim in 1998, with the goal of serving as an electronic securities trading platform for small to mid-sized hedge funds. As a program trader at Morgan Stanley though the 1990s, Shams had come to see a market opportunity, since: (1) both electronic trading and the hedge fund industries were experiencing phenomenal growth, and (2) larger trading firms, such as Morgan, were not finding it cost-effective to serve the trading needs of smaller funds. Frustrated with the bureaucracy of a big firm, and recognizing a chance to start his own business, Shams decided to leave Morgan in early 1998.

During its first two years of operation, AFA had succeeded in raising several rounds of venture capital and in winning clients in New York, San Francisco, London and Hong Kong. By 2001, offices in San Francisco, Hong Kong and Karachi employed some 40

people. However, the company had grown in a haphazard manner, without much thought to planning or organisational structure. In the summer of 2001, the board of directors decided to hire an outside consultant to "put the house in order", systematize financial reporting, and rewrite the business plan. Nilesh began work on these tasks in November 2001.

Nilesh's background and the evolution of his role at AFA

Nilesh holds an MBA from Manchester Business School in the UK and a bachelor's degree in economics from State University of New York at Buffalo. He is also a Chartered Financial Analyst (CFA). He began his career as a consultant and then senior manager at Ernst & Young, where he remained for six years.

Upon leaving E&Y, Nilesh served for a year as chief financial officer of the New York venture capital firm INCULAB, where he was responsible for the financial management for this incubator and also of six portfolio companies. From November 2000 to October 2001, he operated as an independent consultant, mostly on issues of corporate finance and accounting. In this context, he assisted several early-stage companies in developing financial plans, business plans, and private placement documents.

When he began at AFA in late 2001, Nilesh found a formal business plan, but he considered it inadequate, given the company's desire to find funding from outside sources. Indeed, the plan needed to be entirely reworked, and Nilesh's organisational skills and attention to detail proved invaluable through the entire fundraising process. After the necessary funds had been secured, Nilesh was offered the newly-created position of Chief Operating Officer. Subsequently, on September 28, 2002, the board of directors named him CEO. At that time, it was decided that founder Shams Karim would relinquish the top position to focus on his strength: product development.

5.1.1 Initial contact—redefining leadership

In my role as a board member at AFA, I had known Nilesh since the summer of 2001. My coaching relationship with him began soon after he was appointed as CEO, in October 2002. Nilesh had proven his value as a consultant, but he was conscious that he now

needed to establish himself in a different role—that of a leader. The company's founders and veteran employees were convinced they wanted him "on board", as they recognized the need for the order and structure he could implement. At the same time, Nilesh needed to prove that he could manage and inspire people in a corporate environment. (Personal communication with founder Shams Karim and CFO Andrew Paine on September 12, 2002)

Though I knew Nilesh already, I ran our first "official" meeting as if meeting him for the first time. Thus, I asked a somewhat surprised Nilesh to explain his business to me. I wanted to see him "telling the story" of AFA, talking about his passion for the company and its mission. As is often the case in my first meeting with someone, he did not speak from the heart. His first instinct was to reach for PowerPoint. Indeed, his presentation was a true "data dump," full of facts, statistics and rational argument, and difficult to follow.

In an effort to see him speak in a more anecdotal style, I asked Nilesh how he would explain his business to friends from his MBA class. Even in this context, his tone was more of an analyst than an inspirational leader. There were no stories in his discourse. There was no emotion—only facts, numbers, graphs, and arguments based on reason.

In Nilesh's case, it was truly necessary to redefine leadership and effective communication. Since he saw himself as not at all charismatic, and not a good storyteller, I needed to show him that it was far more important to be authentic, and he could be an effective storyteller and communicator. We set out together to define his true nature, and to teach him to speak of his core beliefs, from the heart. At least in philosophical terms, he accepted these concepts and said he was inspired to work this way..

5.1.2 Structuring the coaching relationship

From the outset of my work with Nilesh, I realized that there would be quite a bit of "groundwork" to do. Based on my observation of him at board meetings, I thought that I had never before worked with any CEO who had so little natural speaking or storytelling ability. His tone was languid and monotone, his discourse flat and technical. There was little emotion or commitment anywhere in his spoken communication. In fact, I would describe the first few presentations I saw him make as quintessential, almost stereotypical

"consultant speak". He had an administrator's frame of mind, the approach of an advisor rather than a manager or leader. As AFA founder Shams Karim was put it, Nilesh was extremely competent, and not at all inspirational!

On the positive side, of all the leaders I have worked with, Nilesh was the one who brought the most energy and commitment to our coaching venture. From the start, he saw that learning to communicate effectively as a leader was a critical issue in his own career development, an endeavour that would benefit him for the rest of his life. He understood the importance for the company as well. Having experienced startup situations, he felt AFA's success would depend largely on its leadership team and its ability to align employees behind a shared vision. He sought to define a dream for the future of this company, and to use that dream to lead the company to success and prosperity. In addition, he is an avid learner. Whenever I mentioned a book or an article that might be interesting for him, he made the effort to find and read it. Whatever he may have lacked in natural communication ability he tried to compensate for with his energy and professionalism.

In the end, we defined our goal as teaching Nilesh to speak from the heart—and to inspire those around him with his personal story, as well as his vision for the future of AFA.

5.1.3 First attempts at presenting

As I had observed Nilesh in numerous presentation and speaking situations, we focused on some of his slide-based speeches, and I told him that we had to try putting similar messages in story form. In our early sessions, our discussions of self-knowledge, and of the power of autobiographical story, had intrigued Nilesh, and he was eager to move forward. He understood quickly that storytelling was a vehicle that could help him become a more passionate and inspirational speaker, and he was willing to work at it.

5.1.4 Beginning the journey to self-knowledge

I sent Nilesh a document similar to the one described in 4.4. He studied it enthusiastically

and went directly to work on his journeyline!

5.1.5 Finding the leader's stories

Indeed, Nilesh worked diligently at the journeyline exercise. After several iterations during the month of November, he produced the "My Journey" document from which I quote an excerpt below. The highlighting and questions in bold are mine. The purpose of the highlighting is to accentuate Nilesh's core values, and his quest to express them.

Illustration 12: *"MY JOUNEY" by Nilesh Nanavati*

> I grew up in middle-class family in a very small village in India. As is typical in India, I was raised in an extended family setting among seven other children. As a child growing up among several other older and younger children, I learnt the values of **compromise and consideration** at an early age – to share everything with others and to be careful of others needs.
>
> My father is a spiritual person with deep inner faith, devotion to God, and the desire to help others. I learnt about **generosity and the value of giving/helping** from accompanying my father, a deeply spiritual person, to various events organised by temples and local charities to help feed the homeless and the poor. Even today, this "spirituality" continues to play a significant role in my life – it continuously forces me to maintain a certain balance in my life between my work and my family.
>
> I also learnt a great deal about **patience** from having spent time with my father learning about farming. I used to accompany my dad to our farm in India and watch and help the hired hands plant seeds, plough the earth and even irrigate the farm. Caring for crops and watching them grow taught me patience and demonstrated to me the **joy in creating something from nothing.**
>
> I grew up in a protected environment with constant supervision from family members which instilled in me a certain sense **of "security"** and confidence about my beliefs while at the same time made me less **of a risk taker.**
>
> My parents sent me to live with my uncle in the city for secondary education (as the school system was much better in the city). Moving from a village to a city was a shock for me especially since I was surrounded by kids who were more assertive and competitive than me. More importantly, this was my first introduction to **facing a major "change"** – something that I would face constantly in my life.

> My biggest culture shock really came when I immigrated to the US in 1980 without any prior knowledge of English nor an explanation (from my parents) as to why they wanted me to be in the US (although in retrospect, I learnt that what my parents were doing was in my best interest even if I didn't like it initially - this helped me appreciate the **value of making a decision even if the decision is not a popular one** or one that benefits you directly).
>
> This change in the environment had more impact on me as an individual than anything else in my life so far – it taught me how to **adapt to changing environment** and to focus on the positive aspects of the new environment and not the negative. Although I would live with my uncle in the US I was forced to strive for **self-sufficiency.**
>
> Not knowing English and going to school with my cousins (who had already been living in the US) was challenging. I participated in extracurricular activities (sports, social clubs), which taught me the **merits of competitiveness and the need for social interaction with my peers.** My algebra teacher played an important role in shaping my perspective of the world at that age – he really taught me about the importance of street smarts vs. book smarts. He was aware of the fact that I was not the brightest math student in class but that I had the "street smartness" and practical approach when it came to finding a solution to a problem.
>
> As a boy scout, I was truly into outdoor activities such as camping, canoeing, and hiking. Attending regular summer camps continued to reinforce the value of **teamwork, self-reliance, and the need to be prepared for any eventuality.** In addition to that, exposure to outdoors and nature also made appreciate the value of **balance in one's life.** This view has consistently been reinforced in my childhood and is something that I strive for in my life.

The document continued in similar style through Nilesh's university years, and we were able to discern some of the values that have shaped him. For example, as an undergraduate, he learnt the importance of listening, of being fair and non-judgmental, and of creating work environments that encouraged everyone to grow. As an MBA student in the UK, he lived with students from all parts of the world in the International Student House, and he had to fend for himself financially. Thus, Nilesh came to understand the importance of adaptability, of openness to diverse points of view, and of independence.

His early career at Ernst and Young was influenced by two of his bosses and mentors, through whom he came to value trust, loyalty, honesty, resolve and persistence. In addition, Nilesh discovered that he enjoyed the experience of new ventures, of creating something out of nothing, of working with a team to produce a positive group culture. In

addition, he learnt the importance of finding a balance between flexibility and firmness in managing his subordinates.

5.1.6 Exploring the leader's stories

Upon reading Nilesh's early journeyline documents, I felt that he has done a reasonably good job of going into his past and defining some of the characteristics that describe his behaviour—his core beliefs and their origins. However, I wanted a document with some more emotion, as opposed to analysis. So, in early December, I asked Nilesh to work on two documents: (1) a scenario where he is "catching up with a friend", talking about his passion for his new role at AFA in a conversational style, and (2) a reflection on his point of view and his leadership goals. During December, we worked on those two items; it was my effort to get Nilesh to begin to personalize, to feel and project what he really stands for.

5.1.7 Using personal stories to persuade and inspire

The exercises of December yielded several stories that defined a point of view, and in early January, we began to practice telling these stories. Our goal now is to define a teachable point of view based on Nilesh's core values, and then to paint the inspirational 'future story' for AFA. Our work on Nilesh's journeyline had yielded several core values that reflected the type of organisational culture he wanted to promote at AFA, a culture of simplicity, professionalism, reliability, attention to detail, and truly listening to clients.

Thus, we began working on using his point of view to persuade. Below, I provide two examples from Nilesh's writing and my comments on them. The first is Nilesh's account of his frustration of trying to find an efficient trading system for a hedge fund he ran:

> When I left E&Y and became part of the team that started a hedge fund, I had a chance to increase my understanding about why many financial institutions did not have the right technology...Even more frustrating part about this whole process was that every vendor relied on us the hedge fund team to manage the whole interfacing process between various vendors' technologies. Furthermore, the prime brokers who are the gate keepers and incubators of hedge funds, simply recommended various solutions (including their own which usually was an out of date or expensive technology) but left the final decision to the hedge fund team. This was frustrating because no

> one on our team was a technology savvy person which made it difficult for us to take the ownership as we didn't know the difference between the various technologies. At that point I had thought about why there isn't a technology out there that can cover most (not necessarily all) of the trade management process and make the entire headache go away. Or even more importantly, why there wasn't a technology provider out there who clearly understood the needs/problems of a hedge fund.

My comments to Nilesh: This is a good, usable story. It ties your past experience to AFA's situation, and thereby lends credibility. It shows that service providers do not listen to hedge fund clients, so at AFA there is an opportunity if we learn to listen. However, the overriding message can be greatly simplified. [I use this example again in the discussion of the importance of simplifying one's stories, in part 5.1.13. As we will describe, Nilesh is able to simplify this story greatly, and to use it to inspire.]

The second example of a usable story from Nilesh's writings on his point of view involves attention to detail. He writes of his experience in tennis:

> The importance of detail, of attention to "baby steps" also hits home when I think about the time when I first joined my high school's tennis team. I was a good player but my coach felt that some of my strokes needed work in terms of my grip and control of the ball and that if I didn't work on them now it would be difficult to correct them later. So the coach had me practice mini-tennis (which is when the player plays with another player using the service line rather than the base line as the boundary). I hated playing mini-tennis since it forced me to grip the racket in a way where I had to control my strokes as the court size was reduced in half. Although I didn't appreciate the coach's thinking at that time, I thanked him later as my game developed because of smoother and more effective placement of the balls across the tennis court. Even today when I step out on to the court I first ask my opponent to play mini-tennis with me in order to help me get comfortable with my tennis strokes. The concept of taking small steps in order to achieve a larger end goal once again hit home.

My comments: This is another good story, as it uses your personal experience in a way that you can apply to a professional situation. You can use the tennis example to make your point about attention to detail in client relations. You are really beginning to understand how to use a personal story to make a greater point to those around you. This is a big step, and I congratulate you!

5.1.8 Engaging the followers

Nilesh made several interesting efforts to engage, often successful, and I will describe two of them here. The first example comes from mid 2003. When Nilesh finally did simplify some of his stories, he was able to use them to inspire audiences—employees, clients, or investors.

In fact, in our first few months together, by March 2003, Nilesh had been reasonably successful at transforming himself from a soft, monotone, consultant-style presenter to a powerful speaker with some true conviction and a voice that kept the interest of his audience. However, it took several months longer for him to tell true stories of inclusion, for people inside the company to see him as "inspirational". By simplifying his future story, and calling on all around him to help build AFA into the E*Trade of institutional trading, he truly began to bring employees and customers into a shared dream.

By June 2003, Nilesh had developed a story of changing this industry, telling AFA employees: "We can change the way an entire industry operates. We can turn a traditional industry on its head. We have a great opportunity to simplify trading for the little guy, and to help small funds save money and trade more simply." (Personal observation, Nilesh addressing the AFA sales team June 10, 2003) AFA employees came to view Nilesh's vision and his future stories as increasingly moving and inspirational. For example, salesperson Dave Summers told me that Nilesh had inspired him; he began to see his work with clients as far more than a job. It had become a mission. (Personal communication August 15, 2003)

The second example of Nilesh's telling a tale of engagement and inclusion involved his bringing of two key employees into the storytelling process. In June 2003, Nilesh began telling founder Shams Karim and CFO Andrew Paine that my coaching, and the process of learning to tell his personal story, had transformed his speaking style. Now, he wanted Shams and Andrew to learn to tell their own stories, and the AFA story, in increasingly inspirational ways.

Nilesh asked me to meet with him and the two others, which we did on July 16, 2003. Having recognized the power of a shared story, Nilesh now sought to bring them into the process, to make them protagonists and active participants in the telling, and in carrying the core stories to the rest of the organisation.

For me, the most meaningful aspect of the meeting was watching Nilesh express himself to the others, with deep conviction about the value of our coaching work together. He had opened the meeting by talking about how the process has helped him discover some important things about himself and about speaking passionately to an audience. Then, Nilesh proceeded to state that he wanted Shams and Andrew to help him bring the other employees into the story emotionally: "You don't convince people with rational argument; you have to bring them in emotionally...It is not just about telling a story; it is about finding your passion and speaking authentically. In sales, we also must go beyond rational argument. People buy our true belief and our passion. We have to carry our story and our passion to the rest of the company, and the rest of the world." I was proud and gratified to hear these words from Nilesh, as I could not have said it better myself.

During this meeting, both Shams and Andrew commented that they had indeed been struck by Nilesh's evolution as a communicator. Increasingly, they had come to view Nilesh as truly inspirational. This change in their opinion of Nilesh was also quite satisfying for me. Less than one year earlier, as we met over dinner in London to talk about AFA's perspectives and Nilesh's role, Shams had expressed to me his concern that Nilesh did not really inspire him and the others. (Personal communication November 2002) By July 2003, that concern was gone.

5.1.9 Stories and authenticity

Nilesh's stories are authentic because he has made a real effort to align the values and behaviours necessary for AFA's success—simplicity, clarity, responsibility, reliability, listening to the client, professionalism—with qualities that he truly embodies. Thus, the stories he tells are very close to the stories he lives. Whether he speaks of his simple background in Indian society, his frustration with the complicated trading systems at Morgan Stanley, or his learning about professional behaviour at Ernst and Young, he is

credible because those around him observe these characteristics in his daily demeanour.

In his meetings with clients, his stories of running a hedge fund set him up as a credible critic of trading systems. He can make the point that AFA strives to listen closely to its clients because everyone who meets with him observes that Nilesh is an attentive listener himself. His stories of tennis and of studying American culture when he first arrived in the US demonstrate his attention to detail.

5.1.10 Practice, repetition, and ongoing exploration

Since Nilesh was usually diligent about writing, I tried to use his journal entries often as entry points for our telephone conversations or live catch-up sessions. For example, in early February 2003, as he was preparing a major presentation for Citibank, Nilesh described his plan for the speech in his journal, and we then decided that I should coach him through it on the telephone. On February 4, we spent almost three hours in a phone conversation, and he did the first five minutes of the speech at least 15 times!

Nilesh opened the presentation with: "I want to talk to you today about why I do what I do, and in particular why I am excited about what we're doing at AFA." He proceeded to tell some personal stories of identity, around the concepts of simplicity, integrity, professionalism, and listening. Since two AFA board members, Ameet Shah and Howard Schwartz, witnessed the presentation, I was able to get some immediate feedback. Ameet said simply that he thought Nilesh's performance was extraordinary, that he had given the presentation of his life. Howard commented that Nilesh had really stepped up and delivered, and that it made him "proud to be associated with this company." Both of them saw Nilesh as "transformed" by the coaching process! (Personal communications, February 3, 2003)

Inspired by his own presentation, Nilesh spoke to me of his desire to revisit his autobiography, to look for more and better stories. (February 10, 2003) Thus, we returned to the practice of keeping a journal as a device to stimulate continuous reflection. Nilesh expressed to me on numerous occasions that he had made the most progress when he was keeping a journal in this manner, and when I was using his journal as an opening point for

practice, and as a reminder to focus on leadership communication and storytelling.

Around the time of the Citibank meeting, improving his communication skills was truly "top of mind" with Nilesh, and he was making great progress quickly, evolving into an increasingly effective evangelist and chief salesperson (indeed, storyteller!) for AFA. However, as we will see in the "pitfalls" section (5.1.16), Nilesh could have pushed storytelling practice and "slow management" far further.

5.1.11 Writing "as spoken"

As we have already noted, Nilesh worked hard at writing from the outset. However, he often struggled with developing a clear and direct speaking style. In the end, it was writing as spoken that proved an important tool in transforming Nilesh's discourse from consultant-speak to a far more natural and authentic form. During the period from May to August 2003, we worked a lot on "talking versions". This step was critical in increasing Nilesh's feel for inspirational communication. Nilesh would write a version, send it to me, and then we would practice on the telephone or in person when possible.

A year after our coaching arrangement ended, Nilesh looked back and again reflected on what he learnt from the device of writing as spoken, in August 2005: "I think the one thing that helped me most to develop confidence in my ability to convey my messages and tell my stories was the act of writing in my spoken voice. This type of writing was a real revelation to me, as it allowed me to feel the concepts of to modulation and punctuation, two elements I had struggled with for months. Learning to visualize, seeing and feeling my words on the page as if I were articulating them aloud, led to more positive change in my speaking style than anything else we did." (Personal communication August 16, 2005)

As an example of how we used writing as spoken, I cite a passage I asked Nilesh to write in June 2004. At that time, I was a bit frustrated with Nilesh's lack of attention to practice. As I mentioned above, working with Nilesh on keeping a natural style—personal, authentic, and simplified—was an ongoing "battle". When he failed to practice consistently, he would often slide back to consultant-speak, to lecturing his audience, to waxing monotone. In the passage below, I asked him to imagine talking in a natural voice about where the industry was going, his vision of the future of institutional trading, his

"what I see out there" story. Specifically, I suggested he intersperse his discourse with rhetorical questions, to punctuate the speech and give it some life.

Illustration 13: *NILESH WRITING AS SPOKEN, USING QUESTIONS*

> Where do I see this industry going?
>
> Brokers have always controlled trading in this business as middlemen. Institutional clients, specifically small ones, are increasingly frustrated by not being able to control when, how, and with whom they trade. Brokers, on the other hand, have been reluctant to give up control since that would mean electronic trading gives enormous power to the trader and allows control of the trade to change from the broker to the clients. This struggle for change is best described by Ulf Svensson, Head of Hedge Fund Sales at Deutsche Bank in my recent conversation with him when he said "there is a freight train coming and either people will have to be on it or under it".
>
> How will the change come about?
>
> Electronic trading will change everything, giving clients direct control of their trades and allowing them to bypass their brokers.
>
> How else will the trading process change?
>
> Automation will not only give control of the trade to clients but it will also help them streamline their operations. Many clients are tired of having two or three systems to manage their trade execution and order management process. So, by having everything bundled into one application, not only will small funds be able to control trades, they will also do their reporting efficiently.

Nilesh practiced writing and speaking this way, interspersing his discourse with such questions as how industry changes would affect traditional brokers, and why AFA could provide a different solution. Writing as spoken was an effective device with Nilesh, because he could imagine his interaction with the audience, remind himself to ask the rhetorical questions and to keep his explanations simple. In fact, Nilesh and I both agree, in hindsight, that he did his most effective communicating during the periods when he was able to write talking versions in his journal, and when we were able to use his journal entries to stimulate practice sessions.

5.1.12 Projecting

Projection is one of Nilesh's biggest challenges, and as is typical of his behaviour, he often worked hard at it. However, since Nilesh comes from a culture where self-effacement is the norm, it was sometimes difficult to get him to project out, even after he had embraced the concept. Indeed, in the first few presentations I saw him make, he was sitting, and one would have said that he was trying to make himself as small and as inconspicuous as possible. Nilesh is a small man physically—short and thin—and the first thing I asked him to think about was not speaking "small" but rather standing up and taking command of the space.

Soon after his appointment as CEO, Nilesh and I practiced a speech he was to make to all AFA employees. His goal was to use the moment of taking on the CEO title as an opportunity to begin to build a new corporate culture—one with more honesty, simplicity, and professionalism. Since his delivery in our practice sessions had been quite monotone, I asked him to imagine himself projecting and modulating, even in exaggerated ways. I told him to write a speech with pauses, punctuation, and emphasis on key words and concepts, and then to practice it aloud. Below is an excerpt from the beginning of this speech (with emphasized words underlined), written on December 1, 2002:

> You know, I come from a culture of honesty (pause) and simplicity. (Pause) I come from a place where listening and understanding are important values (pause). I've listened to you for a year now (pause), and I will certainly continue to do so. But, forgive me if I speak openly and simply about how I see our future. We have been successful thus far (pause), in a difficult time for businesses like ours (pause), and now (pause), now it is time for this company to grow into its next phase...

Writing in this manner was a great help to Nilesh. In our live sessions, I emphasized standing up and punctuating his key words, changing speeds, and modulating his voice. Slowly the droning, monotone character of his discourse began to fade away. We also made a big point of taking over the space, but in a manner authentic to his personality. As I wrote to him on January 11, 2003: "You need to learn to take over the space, close distances, and bring others in. It is a lot like a huddle, or a campfire. You want to find ways to bring people with you. When I talk of taking over the space, I do not mean in an aggressive manner. Simply learn to use it to your advantage."

In addition to projecting his own voice, I also wanted Nilesh to work on projecting a compelling future story, to project the entire AFA team into a heroic journey. Indeed, they had in front of them a rare opportunity to change this industry in deep and fundamental ways. Together, we worked on stories of doing new and exciting things in the industry, of changing rules and competitive landscapes, of using speed, intelligence or technology to conquer worlds dominated by big, powerful, more traditional players.

Judging by the reactions of those close to him, Nilesh made considerable progress in the area of projection. In fact, during the period from mid 2003 to mid 2004, numerous employees, board members, and other observers were to notice dramatic changes in their CEO's spoken communication. For example, AFA chairman Ameet Shah commented to me (May 16, 2003) that Nilesh's transformation as a speaker, from "boring and a bit dreary" to "inspiring" was "truly unbelievable". Similarly, Shams Karim (company founder and director of product development) made a point of telling me (August 22, 2003) that "whatever you are doing with Nilesh, it has been great! I am so impressed with his emotion now when he tells a story. He is truly speaking out, and getting others to believe." In an impromptu conversation over coffee (April 7, 2004) salesman Chris Kniffin reflected back on the preceding months: "What has changed...is that the messages have become clearer, the stories simpler. Nilesh is making an effort to speak out. His articulation of the vision and the direction of the company are far more forceful than ever before. The concept of who we are, what we stand for, the sales story, the solutions we can provide for customers, where we are going...it has all become clearer and more defined. I can feel now that Nilesh is leading this effort, and it feels like we are on a mission." CFO Andrew Paine, also present at that casual encounter at Starbucks on 5th Avenue, agreed wholeheartedly.

Certainly, when I compare his monotone performances at the beginning, where one would have thought he was making every effort to appear as small as possible, I can say that Nilesh truly learnt to project out with authority. However, as we will see in the "pitfalls" section, I always felt he could go further.

5.1.13 Personalizing

Somewhat similarly to projecting, the concept of personalizing met some cultural resistance. In the first few months of our work together, Nilesh had great difficulty personalizing any business conversation or presentation, since he comes from a traditional Indian society, where it is seen as impolite or boastful to talk about one's self. In addition, he and his company were selling a technology product.

Nilesh became a "true believer" in the concept that telling a personal story was the best way to "find the emotional triggers" that allowed him to connect with those he sought to influence. As he explains: "One of the biggest lessons I learnt is that, in the end, people are buying you, not the technology. With clients, telling stories of my family, my background, my childhood in India, or my business experience...it all helps me make the connections that build trust." (Personal communication July 28, 2004) By early 2004, personal stories were at the core of his everyday communication and formal speeches, and the employees of AFA were commenting to me about the change. For example, company founder Shams Karim told me that we had "transformed" Nilesh's communication style from "low-key droning" to "highly energetic and laden with enthusiasm". Finance manager Andrew Paine asked jokingly if Nilesh's new-found liveliness was the result of some mysterious "personality transplant." (Personal communications with Shams and Andrew—February 22, 2004)

As mentioned at the beginning of this section, Nilesh did struggle some with personalizing. The examples below (taken from his "writing as spoken", or as we were calling it, his "talking document" journal—entry of June 25, 2003) demonstrate, or at least give a feel for, that struggle. At the time, we were working on personalizing, simplifying, and modularizing his stories. Our exchanges often happened by email, and in the examples, my (abbreviated) comments are in italics.

> My "hedge fund experience and why it was frustrating" story: Two years ago, I was part of a group that started a hedge fund. During that phase, I went through a frustrating process of trying to acquire the right technology, one that could help us create a seamless trading environment. The frustration came about from several sources – either technology vendors not having a product that fit our needs or technology being too expensive or technology not doing everything we wanted it to do...This experience is very depressing because here I was trying to help these vendors out by looking at their products and they were in the process taking advantage of

> my lack of technical understanding. I would rather have had them tell me they don't have a technology but they can build it for us (in exchange for payment) rather than promising the world even if they didn't have it or worse yet, trying to "push" their proprietary technologies on to us.

This is getting better. Now we have to make you more active in the story. I might try to make it even more personal and more humorous, e.g., "let me tell you what that felt like..." More personal in the sense of "do you know what I had to do when I went out to buy a system?"

> My "frustrations with technology" story: As I was wondering whether there was a company that could do something like this I came across AFA. Interestingly, Shams also shared a similar view form his days at Morgan Stanley where he saw the need to have a technology to services small to mid-size clients. With this in mind, we set out to build our first version of COMET technology which was build with trading as a process in mind rather than a combination of isolated activities. Furthermore, COMET was also designed in a way to make it easily deployable.

Again, we need to work at turning this more active. My suggestion would be to turn this into a "why we are different" story. We are different because we simplify. We listen to the client. We make the process seamless.

> [From a speech to our team on June 19, after a visit to an industry conference where we saw many very good vendors with technologies that "overwhelmed" our guys]: I see that all of you have a perplexed look on your face – well you should. Because it is always good to get a sobering wake up call as to what is out there in terms of competition. But while competitors will always be there, let's think about the concept behind our system vis-à-vis their systems...we all saw the system from Inforeach – most of you thought that was a bloody good system, and it was, but to me that system and the philosophy with which it was designed once again proved to me why we are on the right track If you noticed one thing, this system was overly sophisticated meaning that many of the fancy things you saw will not be used by our clients...Also if you noticed, this system was designed by technology experts rather than people with some practical understanding of technology role in trading. At AFA, we believe in simplicity not complexity when it comes to building technology to service our clients. Simplicity sells because it meets client needs – clients already have too many things on their plate –why bog them down with more work by giving them complex trading systems – why not make the whole process of buying technology easier for them? Why not make the whole process of <u>using</u> technology easier for them?

This is a perfect opportunity to tell a strong "who we are" story. Work on that—a definition of who we want to be and who we don't want to be...and why. For example, we don't want to have the best technical system; we want to be easy to use, simple to

understand and implement, just "plug and play".

In the end, personalizing lent great power to Nilesh's discourse. There is still a tendency to give explanations that are a bit long, complex, and laden with "tech-speak". We deal with these issues in the next section.

5.1.14 Simplifying

From the beginning, we had to take the "consultant-speak" out of Nilesh's discourse, and this was another sizable challenge. Looking back, I realize that I really had to hammer away at this, even get angry at times. The tech-speak was really hard to remove, and to be honest, we were never completely successful!

When we began to streamline Nilesh's selling story, we literally worked for months in late 2002 to reduce it to its simplest elements. My initial approach was to ask him to speak in the following hypothetical circumstance: Imagine sitting on an airplane next to someone who knows little about Wall St. or hedge funds, and he asks you to explain what your company does. At first, Nilesh was completely incapable of connecting with his listener in this type of situation. To my dismay, he told a story that would not reach the listener at all. Despite our (already!) many weeks of practice, his message remained overly intricate and unclear.

As an example of discourse that rings overly complex, I cite again an example from January 2003, which I previously quoted in section 5.2.6.

> When I left E&Y and became part of the team that started a hedge fund, I had a chance to increase my understanding about why many financial institutions did not have the right technology...Even more frustrating part about this whole process was that every vendor relied on us the hedge fund team to manage the whole interfacing process between various vendors' technologies. Furthermore, the prime brokers who are the gate keepers and incubators of hedge funds, simply recommended various solutions (including their own which usually was an out of date or expensive technology) but left the final decision to the hedge fund team. This was frustrating because no one on our team was a technology savvy person which made it difficult for us to take the ownership as we didn't know the difference between the various technologies. At that point I had thought about why there isn't a technology out there that can cover most (not necessarily all) of the trade management process and make the entire headache go away. Or even more

importantly, why there wasn't a technology provider out there who clearly understood the needs/problems of a hedge fund.

Finally, after numerous live practice sessions, and considerable prodding from me, we discovered an uncomplicated and direct way to portray it, in February 2003: "At AFA, we want to do for institutional investors what e*Trade did for the individual investor. As you are probably aware, an individual can go online, open an account, and buy stock—with little effort or expense. When I began in this industry, I was amazed to learn that small fund managers could not do the same thing. There was simply no easy-to-use, inexpensive software solution for a hedge fund manager wanting to trade shares on line. So, our premise is simple; our software allows fund managers to take control, to purchase their shares in a clear-cut, straightforward and economical way."

The e*Trade metaphor created a story that nearly everyone could understand: "An individual can go directly to the internet and place a stock trade; a hedge fund cannot! This is what we would like to change." Once Nilesh was able to reduce this story to this down-to-earth form, he learnt to use this entry to hold the attention of his audience, adding detail later in the conversation, as circumstances required. Improved sales results soon followed!

5.1.15 Zooming around the core

As the above example of Nilesh's writing illustrates, it was difficult for him to find a conversational style of discourse, and to leave the tech-speak behind. From February to June 2003, I tried various schemes to get him to relax and speak naturally. As is often the case, it was the "zooming around the core" exercise that yielded the best results. Pushing Nilesh to adapt his stories quickly forced him to make them increasingly simple, straightforward; my constant reminders made sure they were personal and inspirationally engaging. During this period, we focused on breaking the core stories down into usable modules or vignettes. By June, we had defined the core tales for Nilesh and AFA:

- Why I joined AFA story: the opportunity I see
- My hedge fund experience and why it was frustrating
- Why AFA is different: we listen to clients and simplify their lives

- Let me tell you what I see out there, in my view, why the world has changed.
- What I learnt when I was with Ernst and Young
- Who we want to be story: the e*Trade of institutional trading

In an effort to get Nilesh to "loosen up", I suggested we turn zooming into a game, where I change the context and he reacts—launching directly into one of the stories without thinking. Playing with the notion of zooming in this way proved enormously productive. As with many clients who take the coaching relationship seriously and prepare diligently, Nilesh often put undue pressure on himself when speaking, coming across as nervous and hesitant, even in practice exercises. Nilesh is quite thorough and meticulous by nature; the desire to perform faultlessly, and to remember all the detail of a speech or presentation, is simply part of his character. However, his search for perfection resulted in a speaking style that was stilted and uninspired, lacking fluidity. In late 2002, when I first observed him speaking in public—on sales calls, in board meetings, or with groups of investors—he would often lose contact with his audience, wandering through circuitous explanations of product technology or long-winded, monotone descriptions of why AFA's service was unique.

Thus, as Nilesh and I worked together frequently throughout 2003, I had searched for ways to help him relax and speak naturally. Discovering zooming "games", and using them to make our training sessions more light-hearted turned out to be exactly the solution I needed for lessening his inhibitions. Through practice and self-observation, he came to realize that his pitches were most successful when he stayed close to his core stories. The more we concentrated on zooming around these stories, the more comfortable he became.

As his self-assurance grew, he could focus less on the detail of his presentation and more on connecting with his listeners. As a consequence, he slowly learnt to "feel" an audience and adapt his stories, adding detail and amplification where appropriate. As he puts it: "Not only did I become a believer in storytelling during the first few months of coaching, I found that, over time, focusing on a few core stories—repeating them over and over—gave me a lot of confidence. Then, John's insistence on zooming showed me that I could adjust to any context. Though I joked that the zooming and repetition might drive me crazy, it really is a great exercise...It helped me learn to stay close to my core concepts, and to add detail naturally, without getting lost. In fact, the frequent zooming probably improved my

speaking more than anything else we did." (Personal communication July 23, 2004)

This feedback from Nilesh was heartening for me, as it indicated that the long hours we had spent on zooming around various contexts were achieving the desired result of building his self-assurance. Indeed, by experimenting with different venues, and constantly asking for more or less detailed versions, my overarching goal is to give the leader confidence that, once it is mastered, story-based discourse can work anywhere.

5.1.16 Develop a "storytelling first" mindset, and practice slow management

Turning Nilesh into a storyteller was not easy, and I often joke with him that it is proof that this "storytelling thing" can work with anyone! As he readily admits, he is not a natural storyteller, nor does he naturally "see" teachable moments in his daily activity. The journal writing process proved critical in increasing his awareness of the importance of working at this, of planning and setting aside time to connect with employees by finding the moments and the settings to tell his stories. Over time, Nilesh came to understand the importance of building bridges to his employees and other constituents, and of using quiet moments to inspire.

As his fluency increased, Nilesh's storytelling became more natural and authentic. In his best moments, storytelling simply became part of the flow of daily life. As he explains: "It took a while, maybe a full year, but as I became really comfortable with the "storytelling first" impulse, I found myself telling my stories everywhere—in client meetings, employee gatherings, and individual teachable moments...for example, in the car rides back from a sales call with our reps. Over time, I came to use it more and more, because it had a remarkable effect. I saw that when I engaged people with stories, they actually listened!" (January 3, 2005)

Nilesh and I spoke often of my conviction that the true basis for leading a team resides in the quality of the leader's one-on-one relationships with individuals, and I succeeded in converting him to this point of view. Hence, one of the most important contexts in which we sought to practice his storytelling was the individual teachable moment. As Nilesh discovered, these quiet moments provide opportunities to connect, inspire, and align. Slow

management puts us in the one-to-one situations where we engage in storytelling with our followers and co-workers. Once frustrated by the "dead" time spent travelling to client presentations, Nilesh came to see the time in a car or an airplane with a member of AFA's sales team as potential teachable moments. Instead of engaging in idle conversation, he began to take advantage of these opportunities to practice his stories.

Nilesh says that learning to use storytelling in these types of daily interactions was truly a defining moment in his personal leadership development. Not only did he deepen his relationships with employees, he gained their trust and was able to coach them, to encourage them to build their individual stories of AFA. As Nilesh points out: "In fact, whenever we take the time to connect with others through our stories, we are teaching them to construct their own stories. This is very powerful in moulding a company culture, and in getting the employees to take ownership of the enterprise." (January 4, 2006)

5.1.17 Avoiding dangers and pitfalls

Certainly, Nilesh made outstanding progress during our coaching relationship, despite his admitted lack of natural ability in this arena. As evidence of his improvement, my notes are replete with the surprised and even amazed reactions of his employees, colleagues, friends, and clients. Thus, I do not mean to minimize the effectiveness of the coaching process in this case, nor of his commitment to our endeavours.

On the other hand, Nilesh provides an interesting example of someone who failed to avoid some classic pitfalls. While he made significant improvements relatively quickly, the daily pressures, urgencies, and uncertainties of life in a fast-moving company prevented him from sustaining his communication efforts. Though he never disengaged from the learning process, at times his focus was (somewhat understandably) on matters that seemed more pressing. As Nilesh's progress as a communicator was largely the result of his resolve and perseverance, rather than natural talent, interruptions to the process were detrimental to his growth.

While Nilesh's attention to the process was exemplary at times, particularly in the initial phases, he simply did not go far enough long enough in <u>deliberate</u> practice. Nilesh did write a lot, often keeping a journal, but he did not always take the time to practice his

speaking. Indeed, from my perspective, a somewhat frustrating pattern developed: Whenever Nilesh neglected practice, whenever the urgency of day-to-day matters came to dominate his agenda, there was a tendency to he stop speaking from the heart, to revert back to "consultant-speak".

As I observed in the general discussion of pitfalls in chapter 4.16, I was somewhat disappointed to see Nilesh speak to the AFA board of directors in October 2006, two years after our coaching arrangement terminated. Some of the elements we had worked so diligently to modify—the fact-based approach, the monotone pitch, and the under-confident demeanour—were creeping back in to his discourse. While still a far more effective communicator than in 2002 (I have to keep reminding myself of this; the hard work we did was certainly worthwhile, even transformational!), he seems to have progressed little since July 2004, and he has even slipped a bit backwards.

By his own admission, Nilesh fell into two typical traps that explain why a leader may fail to progress as a communicator as a coaching relationship winds down: (1) the self-satisfaction trap, and (2) the urgency trap. Content with his enhanced ability to influence those around him with his speaking, and faced with the day-to-day pressures of problem solving and crisis management at a young company, he stopped allocating the time to work on the craft of leadership communication.

5.1.18 Make it a lifelong journey

Far from ending on a negative note, I continue to emphasize that Nilesh has clearly been transformed as a communicator. However, it remains to be seen if the transformation of his mindset will embark him on a true lifelong journey. On the one hand, I am convinced that our work was extremely beneficial; awareness of storytelling and its power to connect with audiences will remain with Nilesh for the remainder of his career. On the other hand, continuing his progress, or reaching new levels, will probably not be feasible without a coach and without a renewed commitment to an ongoing quest for self-exploration and self-expression.

5.2 CASE STUDY: NICK HEYS AT EMAILVISION

This case study covers the period from May 2000 through June 2003, during which I was involved in coaching Emailvision CEO Nick Heys.

Background: The Company and its Founder

Nick Heys describes himself as a frustrated direct marketer, and a serial entrepreneur. Born in the UK, his childhood was spent moving around Europe and the United States. He started his first company, Functional Excellence, in 1987, at the age of 22, distributing American clothing and shoes in Europe.

"I imported Bass shoes from Freeport, Maine, home of the famous mail order company LL Bean. I didn't know much about direct marketing (DM), but I knew the European market. I consulted and advised them." (Unless otherwise specified, this and all direct quotes from Nick Heys are from my personal interviews with him.)

While advising LL Bean, Nick gained a thorough understanding of the power and efficiency of DM, calling it 'the marketing of results': "LL Bean was my education. I learnt all about databases. They would modify the catalogue cover and measure the effect on response rates!" He also began to see an opportunity in advising the many American mail-order companies looking to enter the vast and untapped European market. By 1991, he had transformed Functional Excellence into a consulting company.

Nick built business plans in his spare time, dreaming of opening his own DM venture in Europe. He would find his opportunity at the intersection of direct marketing and the Internet. As a technophile and early user of the Net, he had followed closely the emerging e-commerce model in America. His work with the Franklin Mint had also provided a window on the US marketplace, a precursor of what was to come in Europe: "When I saw, in 1999, that the volume of email in the United States had surpassed that of traditional mail, I knew that we could finally implement true one-to-one marketing."

Nick founded E-Mail Vision (EMV) in May 1999, during the wild and euphoric time of the Internet "bubble". The concept was simple: Emailvision would provide technology and

DM expertise to help companies manage customer relations. With this concept, he had little trouble finding venture capital money. In fact, investors came to seek him out before he had even considered looking for funding! In the first two years, the company grew to become European leader in direct marketing via email.

By 2001, the "bubble" had burst. However, while others were filing for bankruptcy, Nick and the EMV team managed to raise more money. As one of the few survivors of the dot.com debacle, the challenges facing Nick and his company were different. The land grab was over. Now, he needed to build a team and a business.

5.2.1 Initial contact—redefining leadership

I was introduced to Nick by a common acquaintance in September 1999, simply on the premise that he we could share ideas about marketing. After our first conversation, Nick asked me if I would be interested in consulting for the company.

When I first spent time with Nick inside the company in November 1999, I saw the power of his "direct marketing using the internet" strategy, or as he called it "DM on steroids". I also sensed that had the perfect background to develop and sell his concept, and that he was failing to use his personal experience to connect with prospective investors and clients. As a former direct marketer, and a technology enthusiast, he was at the intersection of two powerful trends in the late 1990s: using the internet to interact directly with customers, and using sophisticated computer systems to "mine" the client information that marketers collect.

I made a point of telling Nick that I saw a major part of my consulting role as helping him lead with his personal stories. After hearing my views on leadership, communication and speechmaking, he agreed to work through the coaching methodology. However, Nick lives in a world where his audiences expect "slide shows", and thus it took ongoing convincing on my part, and practice with him, to get Nick comfortable making story-based speeches.

Today, after a successful IPO in February 2006, Emailvision remains the European leader in its field, and Nick is an accomplished public speaker. Rather than selling to clients with

rational argument and logic, Nick now connects with his listeners by telling tales from his own life experience.

5.2.2 Structuring the coaching relationship

Since I was employed as a consultant at Emailvision, and since Nick and I were getting together on a weekly basis, I felt there was little need to write things down. In fact, the leadership consulting initiative was part of a larger effort to help Nick organise the company and create a corporate culture. Our close association, along with the fact that I knew the company and the key players well, was a true advantage in many ways. However, one disadvantage of the situation was that Nick and I never sat down to define my expectations of him in the process. At the same time, given Nick's entrepreneurial personality and short attention span, I am not sure such definition would have changed his behaviour or the outcome of our initiative.

5.2.3 First attempts at presenting

Nick and I had various discussions of storytelling. I had told him of my work with others, of my research, etc. before we decided that I would coach him in communication. Thus, his interest in, and acceptance of, storytelling happened naturally.

5.2.4 Beginning the journey to self-knowledge

I would have liked to send the written document to Nick and engage him in a process as I do with most clients. However, because of Nick's personality—the classic entrepreneur who does not often sit still long enough to absorb and reflect on a long document—and because of our frequent contact, I chose a different path in his case. Rather than send the document and ask him to do the introspective journeyline exercise on his own, I did it with him in several coaching sessions during the summer of 2000. I would renew the process of searching for, renewing, and practicing his stories of identity on numerous occasions in the

period between 2001 and 2003.

5.2.5 Finding the leader's stories

While Nick understood the concept of storytelling, and accepted it readily, it was sometimes difficult to get him to write. He certainly did far less deep introspection than most of my other clients. My strategy with Nick was somewhat different from the usual approach: rather than ask him to spend hours reflecting and writing on evenings and weekends, I used our coaching sessions to draw out his stories.

On the other hand, from the first time I met him I could see that Nick has a very clear sense of self. When one asks him about his personality, the reasons for his frustrations in his previous jobs, what motivates him in general, or his reasons for starting Emailvision, he responds articulately, and without hesitation. While I understood that he would have difficulty focusing long enough to do the specific introspection of the journeyline exercise, I was optimistic that together we could draw out and compose his core stories of identity, using his self-understanding as a point of departure. During the first months, we composed lists of the stories from Nick's past that we would explore.

5.2.6 Exploring the leader's stories

Here is an example of the process I used to write Nick's stories. On March 13, 2001, I probed him about why he started Emailvision, hoping that he would talk with some emotion about his frustration in the world of direct marketing (DM). As he spoke, I took notes and asked questions to expand the story. When we finished, I told him to summarize this story in an email, of which I cite a portion below:

> I was a vice president and managing director of several direct marketing firms, and I came to know the industry and its systems well. Some things about it always bothered me. In fact, the entire time I worked in DM, I was frustrated, and I thought the whole process was unfair. As time went on, I discovered that the world of DM is full of inefficiency and injustice. Agencies overcharge, to the point that traditional DM is not accessible to small players. You simply need a lot of volume to make the agency charges cost effective.

> The other thing you should know about me is that I have always been a tech junkie. When the internet phenomenon exploded in the late 1990s, I saw a huge opportunity. I thought we could do direct marketing through email, in a far more direct, targeted, personalized, and cost effective way. It was a dream for me to use technology to make DM more accessible by lowering the costs. In a sense, Emailvision is my crusade against traditional direct marketing—and its unfairness to small companies.

We came to call this story the "why I founded the company" story, and it became one of Nick's core stories, particularly with clients. While Nick never did the individual introspection to get to this story on his own, the end result was the same. As we practiced, he learnt to tell this tale with feeling. Board member Guy Porré would later tell me that he was inspired to join the company because he was inspired by Nick's "founder story". (July 12, 2004)

Other than the founder story, we turned several tales from Nick's life experience into his "core" stories, including:

1. Testing the limits of DM, from his time at the Franklin mint

2. His fascination with direct marketing from the beginning, because one sees results quickly.

3. The typical phone call from a potential client: "I want to do some direct marketing. Where can I buy a list?" Telling this story gives you an opportunity to teach, to explain that Emailvision's system is not about blasting to a list (spamming!), but rather about sending targeted and personalized email that the customer truly wants.

4. DM can be really complex. I remember the campaigns we used to do with traditional mail. They were chaotic, complicated, complex beasts. I decided it was important to keep this stuff simple. At Emailvision, we have the simplest system in the industry.

5. We want to drive change in this industry. I am convinced that true direct marketing, leveraged with technology, is the way of the future.

5.2.7 Using personal stories to persuade and inspire

By late 2000, Nick was convinced that storytelling was his most effective form of communication. When the company grew enough for Nick to hire a personal assistant, part of the job was to "help the CEO build and communicate the storyline." To me, including this language in the job offering demonstrated Nick's commitment to spreading storytelling throughout the company.

In fact, it may have been his interactions with the world of venture capital—the act of raising money for a start-up business—that first convinced Nick of the power of storytelling. Whenever Nick practiced his VC "pitch", I we removed slides and added personal stories at every opportunity. In the end, Nick realized that stories were the most effective selling tool, particularly to clients and investors. As he explains: "What I discovered was that using personal stories wherever possible is the best way to reach people." (February 12, 2006)

Inside the direct marketing industry, as well, Nick has become a master at telling stories from his past. One of the core stories we worked on during the entire three-year period of this case was a story we call "test, test, test." Here is an excerpt, first written by Nick and me during a coaching session on 14 December 2000:

> I used to drive operations people crazy at the Franklin Mint. I remember one time I set up a test matrix plan in France to test 20 different ideas, simultaneously. Each idea had the potential to increase profit significantly—or not! The operations people would try to calm me down. I quickly learnt that coming up with ideas was the fun part; execution was complex and costly.
>
> One thing I am is impatient. When I test, I like quick feedback. Back in the Franklin Mint days, I had to wait 3 months between the test idea and the results of the test. In the meantime, I had twenty new ideas I wanted to test, but the operations people would tell me that it was simply too expensive to test them all!
>
> Today, all these problems are gone! At Emailvision, we have built systems that enable marketers to test quickly—the entire test, read and react cycle in under 72 hours—and inexpensively! That is what we want to be—the company that brings specialized DM techniques and technology to the non-specialist, in ways they can afford.

David Hughes, who served for several years as UK sales director for Emailvision,

commented to me that stories such as this one were extremely effective with those who understand the direct marketing concept, both in sales calls with clients and at industry conferences. As he related: "Nick is among the most inspirational people in this entire field. He is very persuasive when he tells his stories, particularly the ones that show his industry experience, combined with his love of the new technologies." (July 4, 2001)

5.2.8 Engaging the followers

Nick and I went quite far in writing a collective "who we are" story with his management team, and in seeking buy-in from the entire organisation. From the beginning, he wanted to create a company on a mission—an environment where the meaning of the collective undertaking was more important than power, position, or compensation. In this section, I will attempt to provide a sense for some of the instances where Nick sought to engage various elements of the organisation, often using the power of storytelling.

The values initiative

During the period of April-May 2001, I encouraged Nick to spearhead a process of defining the values that the company lives by. In various forums and venues, the management team talked about values regularly. This "values initiative" unfolded in several stages. First, Nick wrote his draft of a values statement. Second, he met with his key people individually to get their input and buy-in. Third, further group sessions clarified the core principles and generated buy-in from the participants. By late April, there was a collective values statement, and in May a commitment from top and middle managers to live by these stated values. The values statement at that time read as follows:

> Values @Emailvision
>
> 1) TEACH & LEARN: communicate, share new ideas, and develop skills, coach, enthusiasm, teamwork
>
> 2) TAKE RESPONSIBILITY: Integrity, trust, accelerate decision making process
>
> 3) BREAK THE RULES: Take risks, reach for high goals, take initiative, be entrepreneurial, freedom, think different, innovation.

One of the elements we see in this "values" event is an effort at writing a collective "who we are" story, and the positive effect this process is having inside the company. CFO Jan Horstmann, a veteran of Arthur Anderson, said that he was quite surprised to see the focus on values and culture at such a young company. (June 11, 2001)

The "values" story was to grow in scope and in importance during the rest of 2001. In June, Nick lead a re-organisation of upper tier responsibilities at the company, driven by the CEO's desire to give more power and responsibility to key members of the management team. Nick wanted to get his top managers to "step up and participate more". Though he is not naturally prone to delegation and sharing power, we worked quite a lot on his delegation skills, with the overall goal of freeing Nick to spend his time telling the story and evangelizing.

The Disney Festival

In the summer of 2001, Nick and I talked quite a bit about "scaling up" the story. Now that Nick had truly bought in to telling his "founder" and "values" stories, how could we get the organisation to follow? Beyond the top managers and the natural allies, how could we help *everyone* to feel part of a mission with a greater purpose? With his typical sense for the grandiose, Nick proposed organising a company-wide "festival" at Disneyland-Paris for mid-September. The goals of this two-day event are to celebrate survival and prosperity, and to highlight the inspirational elements of the company story.

Together, Nick and I conceived the following plan: We would base the entire festival around the stories of individual managers, with all of the stories linked to the larger corporate story. In July and August, I would have a coaching session with each speaker. As the baseline of the corporate story, Nick and I defined several themes, which I emphasized in coaching the others: (1) we are one of the very few French companies to have survived the dot.com bubble; (2) we are doing something important to transform this industry, as forerunners at the intersection of direct marketing and internet technology; (3) venture capital investors are still enthusiastically backing Emailvision; (4) we are a fun company to work for. After several practice sessions, all of the Disney speakers—the company's six highest-ranking executives—were weaving several of the core ideas into the personal stories they told.

This Disney event was a true milestone, generating true excitement around both the company story and the stories of individuals. For several members of the management team, this was the first time I had worked with them on the storytelling concept, and I sensed a good deal of scepticism in the preparatory coaching sessions. In the end, the most sceptical of the bunch—CFO Jan Horstmann and CTO Andrew Storrer—worked hard at preparation, and they truly felt the power of persuading with personal stories. For me, the weekend was a resounding success, for several reasons. First, Nick had made an inspired effort to engage the key people as protagonists. Second, the event clarified and unified the company vision, culture, and stories of identity. Third, the management team was actively spreading the storytelling dynamic throughout the organisation!

In the end, I was most gratified by the reaction of Jan Horstmann, for whom the entire event was indeed a revelation. As he would express to me soon afterward, "the enthusiasm generated by people's speeches and their stories was one of the most exceptional things I have seen in my career. In the many corporate events I experienced at Arthur Andersen, there was never anything that had this kind of impact." (September 29, 2001)

The January 2002 Leadership Seminar

Energized by the success of the Disney event, Nick asked me to conduct a weekend leadership session for the company's 13 top managers, the last week of January 2002. Among the concepts we would emphasize would be using storytelling as a motivational tool for building group culture, shared vision, and teamwork. The participants came from Emailvision's three corporate offices—France, Germany, and the UK—representing six nationalities. As preparation, I asked participants to reflect on their career journeys, and to tell a story that in some way connected their personal beliefs to the Emailvision mission.

Judging by the reaction of Nick and the management team, the leadership weekend was also a resounding success. Nick called early the following Monday, to express his feeling that the events we had organised around the concepts of leadership and storytelling continued to have a "tremendous impact" on the company and its culture. Marketing director Torben Skojdt, with who I had discussed storytelling on numerous occasions during the previous two years, told me that he was "amazed by the buy-in of the others. We succeeded in generating some real enthusiasm across the entire team about the value of sharing our personal stories and telling them in our groups. That will make us all better

leaders." (February 12, 2002)

Conclusion to this section

Certainly, in the three events we recounted above—the values initiative, the Disney festival, and the leadership seminar—we see a truly exceptional effort by Nick to align, engage and inspire. In addition, throughout this entire period from through mid 2002, Nick is defining and living the values, and telling the core stories across all constituencies.

5.2.9 Stories and authenticity

Nick's stories are certainly authentic. When he talks about direct marketing, testing, or his enthusiasm for internet technology and for "direct marketing on steroids", these are stories that we see him live every day. When he says that he wants the company to be impatient, creative, curious, and impertinent, he clearly shows the example in his own demeanour. The "values" statement truly reflects the behaviour of Nick and the group: they were breaking the rules, making fast decisions, teaching and learning from one another. Thus, on one level, we see Nick embodying the stories he tells.

However, as we will discuss in more detail in sections 5.2.15 and 5.2.16, Nick suffered at times in his relationships with employees because his commitment to storytelling and to MBWA (management by walking around) was somewhat sporadic. In other words, his story was authentic, but he failed to tell it enough, and he failed to embody the story in ways that were clear and perceptible to the rest of the organisation.

5.2.10 Practice, repetition, and ongoing exploration

Nick understood the importance of practice, and his commitment to it—both for himself and his management team—was often exemplary. I say often, rather than always, since Nick's attention to the process was repeatedly diverted by the day-to-day urgencies of running a start-up company.

From the outset, Nick made a connection between entrepreneurship, raising money, and storytelling. When he speaks of his fundraising experience, he credits practice and repetition—both in our practice sessions and in the act of repeating his stories to venture capitalists—as the keys to leaning to make an effective presentation. As he explains: "The process of raising money means that the entrepreneur must become a good storyteller. The need to be convincing to potential investors, forces you to learn to define your concepts clearly. I learnt how to do this through trial and error...and a lot of practice." (January 25, 2002)

However, Nick's leadership suffered from a failure to be present and repeat his messages often enough throughout the organisation. Ironically, Nick's communication to his management team often demonstrated an understanding of the concept of repetition. For example, immediately following the January 2002 leadership weekend, he wrote to the participants of his desire to recruit all managers in sharing the vision and the values regularly across the company (emailed January 30, 2002):

> I hope you all enjoyed this first leadership event -I certainly got a lot out of it to start applying immediately. Thank you all for turning up and participating. Thank you, John for doing a really great job inspiring us, broadening our minds and moderating.
>
> So that this does not become "just a fun weekend" in our memories, It is now over to YOU to use what you learnt to work on your personal plan to better lead your group, share our values and tell your story every day... Please do not hesitate to take John up on his offer to work with you and your teams on a local session if you think this will be useful.

In retrospect, I see messages like this one as somewhat ironic, since it emphasizes the importance of practicing our stories, and of repeating them constantly throughout the organisation. If Nick had one great inadequacy as a leader and communicator, it was a failure to repeat his stories often enough or to live them visibly enough. While Nick always had a clear idea of what he stands for, at times the organisation did not.

5.2.11 Writing "as spoken"

Despite the fact that Nick discovered great value in this type of writing, and in fact told me on several occasions that they made important strides when we focused on writing this

way, it was difficult to get him to do this sort of practice.

Since Nick was sporadic in his commitment to writing, I "tricked" him into writing "as spoken" by asking him to write emails to his management team, and to craft these memos in a casual spoken fashion. It turned out to be far easier to convince Nick to write in this manner, and I was able to save numerous of these emails, as traces of Nick's progress in writing "as spoken".

In the "commitment" email below, Nick imagines speaking to the group, at a time when his management style had come under criticism. Nick tends to be impulsive, and there was growing sentiment toward the end of 2001 that he did too much micromanaging and made rash decisions about low-level issues. In light of the criticism, Nick and I talked of how we could "write a new story" for 2002, and about how Nick should use his time inside the company.

When we met about these concerns in December 2001, I encouraged him to be present "on the floor" listening to employee concerns while avoiding the impulse to micromanage. We decided he should become chief storyteller, keeper of the tribal campfires, a helper in the client sales process, and a true servant leader. He would strive to become a "direct marketing guru" inside and outside the company, to teach and inspire with his vision for the future. Thus, he used the following email to initiate a conversation with each of his direct reports.

Illustration 14: ***COMMITMENT TO MY TEAM IN 2002 by Nick Heys***

> In fast growing companies such as E-Mail Vision, the role of the CEO and his management team needs to evolve and adapt to the different development stages of the company. That means that the way we will manage the company in 2002 will be very different from the way we managed it in 2001.
>
> In 2002, we will be very focused on meeting our revenue and EBIT targets. Of course, we need to continue to deliver hard, cold and measurable revenues and EBIT. Group profitability will be a key milestone proving that this team can lead and execute. From a management perspective, 2002 will be the year of "stepping up". This means that I will need to shift from a "hands on" directive CEO to become more "hand off" providing you with direction and values upon which you can base your decisions and actions– without me meddling and slowing you down.
>
> This change in management style requires:

A high level of trust on both sides

Commitment from you to reach your agreed upon objectives

Commitment from me to step back and let you do your jobs.

My commitment to you is therefore as follows:

I will become a "servant leader". Looking to help you do your jobs and sell better –but I will not let anyone abdicate.

I will step back from day to day operations to become the chief storyteller and guru

I will inspire more by teaching more classes, helping the teachers teach better and find more speaking opportunities.

I will work to provide you with the best working environment for you to meet your objectives.

I will practice MBWA (management by walking around) but without micromanagement. I will spend more time talking to your staff directly but I will not be judgmental. I will work through the hierarchy if I have any questions on the value of their actions.

I expect you to let me know if I am not walking the talk or living up to my commitments

---

This document was so well written, and its underlying concepts were so clear and well expressed, that I used it to teach part of the leadership seminar in January 2002. After writing this email, Nick did meet with each manager individually. He later told me that the exercise of writing the email helped clarify his thoughts; he thus felt far more able to tell the story of the management change and behavioural change he was seeking. (March 12, 2002)

Similarly, we were able to transform Nick's approach to selling by reducing the number of "facts and figures" slides, and making his presentations story-based. During the first half of 2002, Nick focused completely on the corporate sales effort, and this was one of the few times I was able to convince him to write his stories. As we will see in the reactions of others, the results were dramatic. An example of writing as spoken with a selling story is the "test story", which Nick wrote in several versions between May 2002 and June 2003.

Illustration 15: ***TEST STORY, 6/7/2002 by Nick Heys***

Before founding E-Mail Vision, I used to be a traditional direct marketer and I loved it. I loved it because I learnt that with direct marketing you can test new ideas and compare results with a high level of precision. You then take the winning offer and roll it out to make more money for the company. That was fun because the more ideas I tested, the more ideas I would come up with –ideas generated ideas!. And the more ideas that I tested the more winning programs were born -and more winning programmes generated more money for the company.

In 1993, I got a job as European marketing director for The Franklin Mint. I bluffed my way into the job and I think the only reason I got the job was because I spoke English and they just didn't understand the other candidates! My new boss was called Marty Breisblatt; he had a New York, tough guy reputation and did not take much bullshit. Marty told me my mission was to make him some money –that was it. I had absolutely no idea how I was going to go about improving results.

I started off my new job by signing up to get every single direct mail piece and reviewed all the media ads to try and understand what this company was about. In reviewing the ads and mail pieces, I listed a number of ideas that I thought may improve results. I then presented my ideas to Marty Breisblatt in a telephone conference and waited for his response. The silence on the other end of the line after I presented each idea led me to think that these were not good ideas and I started to wonder if I should start looking for a new job... Finally, after presenting all my ideas, and a long silence, Marty said "OK *Nick, test them all and let me know what works*". Wow, I was amazed that I could just let rip and test new ideas like this to my heart's content. Everything seemed possible.

Over three years, I tested hundreds of new ideas with A/B split tests all over the place; introductory pricing tests, free phone tests, price point tests, new product dry tests. I used to drive the operations people crazy. . I was lucky to have a boss who –whenever I came up with a new idea –would say "just test it".

Eventually, though, I found that testing in a traditional direct marketing environment was slow, cumbersome and costly. It would take three months to prepare and execute a test. Three long months from idea to result became too long for me to wait and I grew frustrated. I also got a grilling at the end of each year from the finance people when I had to justify the high costs of my ambitious test programmes.

When I discovered e-mail marketing, I found that testing costs very little money and the best news is that you can plan a new test and get the results in less than a week! The ability to plan and test lots of new ideas easily, quickly and cost effectively is one of the reasons why I founded E-Mail Vision. With *Campaign Commander*, innovative marketers can test to their

hearts content, understand what works and what doesn't, and improve their marketing budget return on investment. ...And have fun.

Nick later called writing as spoken "one of the most useful things we did. It made a huge difference in my selling presentations, and I am convinced that using more stories—and writing them this way for practice—was a turning point in my ability to produce revenue for the company. If we look back to the numbers, we can see it in the sales results!" (July 22, 2003)

As we simplified and personalized Nick's stories, and practiced writing them, his ability to sell was enhanced. Chris Combemale, managing director of the UK office and someone I had come to know quite well, asked me in November 2002 what Nick and I had been working on, since he had observed Nick on numerous sales calls and seen a transformational impact in his ability to inspire clients. While I could point to the simplifying and personalizing of Nick's stories as important, I told Chris that I truly felt the biggest difference was that Nick had focused—at least for a few months—on the exercise of writing as spoken.

5.2.12 Projecting

On one level, there was little need to work with Nick on projection. In comparison to others I have coached, Nick was quite the "natural" storyteller. Where Tim and Nilesh had been extremely monotone and uninspiring at the beginning or our work, Nick's presentations have always displayed a lot of passion. In some ways, I had quite the opposite problem with Nick: showing him that a presentation is more effective if he stops projecting some of the time. As his relentless projection of enthusiasm could be a bit overwhelming in some situations, I needed to teach him to pause, to slow down, and to modulate. By learning to change his pace and his pitch, he became a more effective speaker, projecting energy at crucial moments of a speech, rather than constantly.

As an exercise, we took several of Nick's stories and added in guidelines for projecting, varying speed, and modulating. For example, in the following version of the "test story", we wrote in the guidelines—pauses and words to punctuate (in bold)—that Nick then

followed in our live practice sessions.

> I started off my new job by signing up to get **every single direct mail piece** **[Pause]**, and I reviewed **all** the media ads to try and understand **what this company was about.** In reviewing the ads and mail pieces, I listed a **number of ideas** that I thought may improve results. I then presented my ideas to Marty Breisblatt in a telephone conference, **[Pause]** and waited for his response. The silence on the other end of the line after I presented each idea led me to think that these were not good ideas **[Pause]** and I started to wonder if I should start looking for a new job... Finally, after presenting all my ideas, and a long silence, Marty said "OK *Nick, test them all and let me know what works*". Wow, I was amazed that I could just **let rip and test new ideas like this** to my heart's content. **[Pause]** Everything seemed possible.

We used several stories in this manner, experimenting with pacing and punctuation. Little by little, pausing and modulation became natural, and it made a significant difference in Nick's discourse. UK marketing director David Hughes, who saw Nick speak at numerous industry conferences and client meetings during a five-year period, noticed a change in the way Nick connected with listeners; his presentations seemed to increase in effectiveness during the period from mid to late 2002, when we were working regularly on pacing and controlling the flow of energy in Nick's presentations. (February 4, 2003) Nick concurred with David, stating later that "learning to vary my pace and modulate was a true revelation, since I had never really thought about these things before." (July 10, 2004)

5.2.13 Personalizing

In 1999, Nick was struggling to sell his fundamental proposition—the concept of using the internet to create and maintain one-to-one relationships with customers—to potential clients and investors. In the early days of Emailvision, Nick's presentations were impressively structured graphical shows, with remarkable statistics and persuasive rational argument. However, it was not until he began to tell his own stories to investors and clients that he started to convince them. As he sees it, personalizing his presentations constituted a turning point in the company's history: "It took quite a bit of time for me to realize the true power of putting one's <u>personal</u> stories at the centre of the selling process. When John convinced me to use <u>my</u> story, more than numbers and logic, to convince my audiences—<u>that</u> is when we started to really sell the concept of Emailvision. I am certain that we could not have become the successful company we are today without John's help,

and without my "awakening" to the power of getting out and telling my own story." (Speech to investors in Paris on November 3, 2005)

By mid-2000, Nick had completely changed his opening. Where he had previously presented industry statistics and charts as the foundation for his rational arguments, he was now beginning with well-chosen personal stories to connect with each audience. For example, at an industry conference, he might tell a story from his career in direct marketing, to make the point that "I am one of you." With clients, he would speak of his frustration with waiting for results using traditional DM; again, potential clients would identify readily with him, thinking: "This guy really understands our world and our problems."

When software industry veteran Guy Porré began working with the Emailvision sales organisation in early 2002, he commented to me on Nick's effectiveness as a presenter. Obviously interested in Guy's remark, I prodded him to define exactly what, in his eyes, was behind Nick's skill in relating to an audience. In his reply, Guy said that Nick had an unusual ability to truly move listeners, and he pointed specifically to Nick's "tactic of opening every presentation by telling a story." (April 17, 2002) As telling personal stories had been at the core of our work together for the prior three years, I found Guy's observation particularly gratifying.

5.2.14 Simplifying

It was relatively easy to convince Nick of the value of simplifying his discourse, since he prides himself on straightforward talk. Early in our time together, I told Nick of my experience coaching other entrepreneurs, and one of the overriding lessons about connecting with an audience: Most people do not want complex explanations of technology or marketing terminology. Instead, they merely want to understand how things work. And, the best way to explain how something works is with a simple story.

In late July 2000, Nick asked me for some examples of how to use story in his presentations, and we designed the "MTV story". The reasons for choosing MTV were straightforward: MTV was an early client of Emailvision, their business model was widely known and understood, and a story about MTV could explain Emailvision's value

proposition to clients and investors—in exceedingly straightforward terms. As such, we wrote the story:

> Think of it this way. A teenage girl from Paris goes to the MTV website and clicks on a song by Madonna. The website asks her if she would be interested in receiving additional information about Madonna's albums and concerts. When she clicks on "yes", we say that she has opted in. When we provide more details about Madonna's activities, we know that this is information that the consumer desires, rather than junk or "spam". What is happening? Beyond providing information, MTV is engaging the client in a virtual conversation. In a subsequent step of that conversation, the website asks if the girl would like to be contacted by email when specific events—such as a Madonna concert in Paris—are about to happen. The girl responds "yes" again, and she has now given permission to contact her. When she gets the mail about a concert, it will be targeted and personal, with specific detail about when and why she had asked us to contact her. It will be the opposite of junk mail! It is mail she has asked for and is happy to receive.

Telling the story of MTV to explain permission marketing and consumer opt-in was a true breakthrough. Nick recognized the value of this type of story immediately, and he began to use simple stories of this type in all his discourse. Little by little, the number of slides in his presentations dwindled, and the number of stories increased. By late 2000, Nick was using these simple stories to make numerous points, rather than relying on PowerPoint slides. Valerie Chevallet, who joined the company as Nick's administrative assistant in December 2000, commented to me that Nick's great strength as a presenter was his ability to "cut through the clutter of industry buzzwords and make his points quickly." (January 23, 2001) To me, this was a direct result of our work to make his discourse story-based, and to simplify the stories.

5.2.15 Zooming around the core

Today, Nick is quite good at zooming. He can tell the "test" story quoted above, or any of his core stories, in various versions, adapting their length and level of detail to fit the audience and context. With DM professionals, he tells them with industry terminology, significant detail, and "insider" humour. For the non-initiated, he speaks in simpler terms, as in the MTV story.

Since we have seen the "test story" and presented it already as an example, I will use it again here to illustrate this point about zooming (though I can think of numerous examples

where the coaching dynamic was similar). If Nick was addressing a group of people with a high level of knowledge and experience in DM—whether industry insiders or potential clients—I encouraged him to tell the test story with more personal detail. This extended version with vivid descriptions of Nick's own DM days established his credibility as someone who once sat exactly where they are sitting. In addition, telling longer versions allowed him to use humour and anecdotal detail to forge a deeper connection with his listeners.

With the "test story", Nick could zoom right to the core point if his presentation was short, but he also learnt to add the sort of detail presented below, if time and the situation warranted, for example at a discussion over lunch, or a longer speech at an industry conference:

> Why is it so much more fun to test today than when I started? Why am I having more fun in this industry today than ever before? I remember how long it used to take to test a campaign, before the internet, before email, and before tools like our Campaign Commander. I can remember at the Franklin Mint—and these people were the true masters of DM, with the best technicians and the best technology—it would take three months to get a good test result. Now, just imaging me—impatient me!—picture me sitting at a desk, in front of my computer for three months, waiting for results. Of course, I was doing lots of other things, and I would certainly not be idle for those three months, but what I was really interested in the whole time was seeing how my test was doing. Just get me the results! It used to drive me crazy, and I am sure many of you, if not all of you, have experienced similar aggravation.
>
> This is how I came to start Emailvision. I spent years behind those computer screens, waiting for results, learning about all the new developments and techniques, watching this industry change. When I realized that technology could help me get results in days rather than months, I wanted to build the tool to do it. And, I thought that every DM professional would see the value of this tool immediately, just as I had.

Nick and I practiced this type of zooming frequently during the first half of 2002, when he was focusing intently on generating revenue. In moments like these, when Nick took the time to practice, he learnt quickly and even came to enjoy the exercise of playing with varying versions. Zooming quickly became a central component of Nick's repertoire, one of his great strengths as a communicator.

5.2.16 Develop a "storytelling first" mindset, and practice slow management

Strangely, this is the area where Nick had both his greatest successes and his greatest failures. He was exemplary in understanding the power of storytelling and in committing to building a culture with it, as evidenced by the Disney event and the weekend leadership seminar. In these and other cases, Nick put storytelling centre stage, and he displayed a true desire to build a remarkable company culture. Often, he sought to spread stories through the ranks, and to help Emailvision's managers develop as storytellers and leaders.

At certain times, we made truly remarkable progress on developing the "storytelling mindset". During the period that encompassed the values initiative, Disney festival, and leadership seminar—from March 2001 to January 2002—Nick made a true effort to extend the "storytelling first" mindset, and to build a "storytelling engine" throughout the company. It is throughout this period that we see the true power of storytelling as a leadership and management tool. Feedback from all observers (top managers, employees, and board members) indicated that Nick was using opportunities to tell stories that engage and motivate, stories about who we are, why we are here (to change the world of direct marketing!), and where we are going. When he pays attention to this type of storytelling, he is truly inspirational.

On the other hand, Nick's most significant shortcoming was his failure to consistently incorporate storytelling and slow management into his daily activities. As we have noted, Nick exemplifies many of the positive characteristics of the entrepreneurial personality: energy, intensity, vision, and an ability to inspire. Unfortunately, he exhibits some the disadvantages of the entrepreneur's mindset as well, particularly the short attention span and lack of sustained focus. Thus, Nick's commitment to storytelling was intense at times, but often only for short spurts.

The values incident demonstrates an instance where Nick told the story and then failed to live the story visibly enough. When he made up his mind that building a company culture was important, he threw himself wholeheartedly into the process of writing of a values

statement in May 2001. He even decided, with the participation and support of the management team, that a significant portion of everyone's compensation would be based on "living the values". In January 2002, during the weekend leadership seminar, the "values story" was again discussed, and one member of the management team had difficulty remembering the document they had written only eight months earlier! Another manager said he had been surprised at his year-end evaluation, to "learn" that the so much of his bonus was values-based, even though he had participated in the decision. (Personal communications of UK country manager Chris Combemale and CTO Andrew Storrer during the seminar) Thus, the values story was typical of behaviour Nick exhibited too often: an intense burst of energy around a worthwhile and meaningful endeavour, and then lack of day-to-day follow-up. The values story had died in the organisation, for want of daily reinforcement.

As the values initiative illustrates, without the support of slow management, stories often fade in the memory of an organisation. Nick proved far better at mobilizing the organisation to create a values statement than he was at encouraging everyone to truly keep those values top of mind. As we pointed out in 4.15, practicing slow management is the best way to keep the core stories alive. It is in the quiet moments of slow management that a leader teaches the organisation to truly live its stories.

While Nick exhibits some fine leadership qualities, his great weakness has been an inability to keep daily contact with his employee base. Indeed, throughout our entire coaching undertaking, my notes show a concern that Nick was not doing his MBWA, not spending the time to tell his story inside the company. As Olivier Terzolo, an astute young salesperson, once confided to me, "Nick has been great at telling the story of Emailvision to the press and investors. Now the funding crisis is over; he needs to turn his focus inward to give the company a soul." (March 30, 2001) Sadly, Nick never fully recognized the critical importance of these internal connections.

As we see in the next section, Nick's failure to maintain the "slow management" bonds with individuals throughout the company was truly a tragic flaw, one that to his isolation and to a January 2003 rebellion that nearly destroyed the company.

5.2.17 Avoiding dangers and pitfalls

While Nick succeeded as a leader and storyteller in many ways, this section elaborates on some of the pitfalls he fell into at various times during the process.

Not following thru or pushing far enough, particularly the storytelling first mentality

Though he committed to the concept of storytelling in his own communication and for the entire company, Nick sometimes failed to follow through on this commitment. For example, the leadership seminar in January 2002 generated enthusiasm across the management team for the sharing and telling of stories of identity. Then, during the period from January to May 2002, leadership and storytelling initiatives were almost completely abandoned. As we saw in 5.2.15, the urgency of finding revenue pushed aside efforts to build company culture or develop human capital. Finance director Jan Horstmann commented on the danger of such inconsistency: "Of course, we need to focus on selling now...it is our survival. But, Nick is sending a confusing message to the organisation. In January, he told us that the leadership development initiative was of primary importance, and now...nothing." (March 12, 2002)

Similarly, not following through on building the corporate story caused a negative reaction after the Disney event of September 2001. Only weeks after this "festival", Nick reorganised the company, and several people were let go. Since Nick was not present enough "on the floor" to explain his reasoning and his decisions, dangerous counter-stories developed. For example, German country manager Werner Reiss told me that his employees questioned the purpose of creating such a gala atmosphere around an event if the inspirational discourse is later perceived as empty. Some of his people expressed cynicism about company management, saying that "the meetings are all talk...Afterward, they [Nick and the managers] go back to sitting in their offices and making their decisions, and we wonder what they are doing." (Telephone communication October 18, 2001)

Unfortunately, Nick often failed to realize that storytelling takes constant attention. Nick had a tendency to rely on big events, company dinners and festivals, to express his vision. While these "happenings" were indeed motivating, he fell short in reinforcing them with his daily behaviour.

Not carving out time for reflection, repetition, and practice.

Since using his autobiographical stories came relatively effortlessly, and since he often had urgent matters on his mind, Nick did not give continuous improvement enough attention during the three years of this case. In my view, he is an example of an accomplished speaker who could nonetheless bring his presenting expertise to an even higher level with some ongoing focus on storytelling practice.

Failure at inclusion

Nick was not consistent enough in his stories of inclusion and engagement. Again, we have noted moments where he was quite effective, showing a true desire to align the organisation behind its shared stories. At times, there were spurts of energy in which he designed story-rich events—the values initiative, Disney festival, and leadership seminar. However, in moments of crisis, Nick has a somewhat curious tendency to abandon the stories of inclusion and make his decisions in isolation. On these occasions, Nick says he is "going into my bat cave" to clear his thoughts and design a plan of attack.

In the period September 2002 to January 2003, Nick's relationship with his employees deteriorated severely. Throughout the final quarter of 2002, there was pressure from the board of directors to cut costs, and Nick took this pressure completely on himself. One of his big mistakes is not sharing that pressure with his employees, not involving the rest of the team in a collective story. Werner Reiss, German country manager, remarked to me that Nick could have run his management meetings very differently. According to Werner, Nick should have involved the management team in the planning and cost cutting, as they were all willing to help. (Telephone communication March 10, 2003) Instead, he lost their trust by going into the "bat cave", sometimes alone and sometimes with advisors, and then coming out to announce a decision.

Nick's isolation reached a critical point in December 2002. At a board meeting in mid-December, Nick had been given the task of reducing costs dramatically in order to reach breakeven by the end of March 2003. Again, Nick chose the path of isolation, and he drew up a radical restructuring plan: scaling back the entire French operation, reducing the payroll costs by over 50%, cutting some jobs in the UK, and threatening to close down the

German office if the company did not reach positive cash flow by Q1 2003.

In the pressure of the moment, Nick once again neglected communication, and he did not involve his management team in the decision. When he announced the restructuring plan in early January, an internal rebelling was already fomenting. Three of Emailvision's vice presidents asked for an audience with the board of directors to discuss their own alternative plan, a less radical reorganisation than Nick had recommended. In addition, they sought to remove Nick completely from daily operations. To make matters worse for Nick, a majority of employees signed a letter to the board supporting the managers' alternative scheme.

Since the point of this discussion is not to follow this example to the end or provide a detailed description of how the crisis was resolved, suffice it to say that Nick was able to navigate through this event and retain control of operations. However, this incident points again to Nick's major shortcoming, and it highlights the importance of maintaining internal relationships through slow management stories of inclusion. In an extended interview with UK country manager Chris Combemale in March 2003, we talked openly about the January rebellion, and about why Nick had failed in his first attempt to align the company around a story. According to Chris, "Nick's stories simply change too often. He is truly inspirational at times, but in the difficult times he leaves us out. Our shared story should not only be about the inspirational times of growth and prosperity. They should also be about how we fight through adversity together...He could have leaned on us a lot more, and involved us in the whole process. By not communicating, he lost our trust."

At times, Nick failed to embody his own stories

While to a large extent Nick's story was authentic, and a story he could indeed embody in his daily behaviour, he was at times unable to live some aspects of the stories he told. Perhaps the most obvious example of this was an email (quoted in 5.2.10) where Nick committed to becoming a servant leader, to listening, to limiting his involvement in daily operations, and to practicing MBWA.

While Nick truly believed in the value of adapting his behaviour in these ways for the good of the organisation, he was incapable of living this story, and his failure to embody his words led to some cynicism. Indeed, Nick was reluctant to step back from day to day

operations, unable to consistently practice MBWA, and often unwilling to engage others in decision-making. As Chris Combemale and Werner Riess agreed, Nick became better at telling the Emailvision story to clients, and he worked at becoming a more effective teacher internally, but he remained too much of a micro-manager. They felt that it is simply in his nature to jump into things, rather than provide an environment where the managers can focus on their own objectives. (Three-way telephone conversation September 16, 2003)

5.2.18 Make it a lifelong journey

To conclude, I should emphasize that Nick's journey in leadership communication has been one of significant achievement, despite the somewhat critical observations in 5.2.15 and 5.2.16. Throughout this case study, we see clear evidence that the use of storytelling has helped Nick craft an inspirational speaking style.

In terms of the lifelong journey, though, I would conclude that Nick's results are mixed. On the one hand, Nick's progress as a truly moving speaker has been extraordinary. He is a lifelong convert to storytelling; it pervades all his discourse today, and it continues to transform him as a communicator.

On the other hand, he is certainly not (at least yet) a lifelong convert to the continuous search for self-knowledge that characterizes the most effective leaders. While he is open to reflection and practice, and he does them well when pushed, but he needs reminders on an ongoing basis. Thus, I am not optimistic that Nick will choose, on his own, to engage in the ongoing cycles of reflection, repetition, and renewal that I advocate for my clients.

6. CONCLUSION

Since I have presented conclusions throughout chapters 4 and 5, in the form of commentary on the impact of the coaching system on the three subjects, I use this chapter to shed light on some of the broader implications of the entire research study.

6.1 GENERAL CONCLUSIONS OF THE RESEARCH

"This stuff really works!"

These four words, spoken by Nilesh Nanavati on 12 November 2003, summarize the overall conclusion of the case studies. In fact, Nilesh was one of the most sceptical and reticent leaders I have ever coached, and he came to believe so completely in the coaching methodology that he asked me to extend it to some of his key personnel. When he speaks of "stuff", he refers to the entire system. In other words, using the theory from the literature and the data from the case studies, we see clearly leadership communication can indeed be coached using the system and the concepts presented.

The journey of self-awareness and self-expression, and the telling of authentic autobiographical stories transformed each of the leaders and their ability to motivate, influence and engage others. We can judge this conclusion clearly from three sources: (1) my observation, (2) the subject's own opinion, and (3) the declarations of third parties who observed the leader. From all of these viewpoints, it is clear that each of the individuals made remarkable and measurable progress. In addition, we note that the evidence comes from a multitude of sources, and that the three case studies themselves present a diversity of contexts and personalities.

In our review of the literature in Chapter 3, we saw a clear tendency toward increased awareness of storytelling in general and of the effectiveness of story-based approaches

to leadership communication. As such, the case studies of this thesis demonstrate that theory and practice are connected, and we present this connection as a true contribution to the research. We can hypothesize that the theoretical interest in story-based approaches to leadership is validated by the case studies herein, and will be confirmed by future case studies as well, simply because "this stuff really works."

From the standpoint of methodology, three varied, longitudinal, and in-depth case studies are presented, with data and feedback collected from a wide variety of sources. In this manner, the classic criticisms of action research—that it can be local, context-specific, and limited to a single point of view—are addressed through careful design of the research. The diversity of the cases, of the industries, of the leaders' personalities, and of the means of triangulation thus lend significant credibility to the findings.

Authentic leadership communication through storytelling can indeed be learnt and coached

In each of our cases, the role of the coaching system was critical, not only in teaching the art of storytelling to the leader, but also in building awareness of the power and usefulness of telling one's authentic personal stories. In two of our cases—Nilesh and Tim—storytelling did not come naturally to the leader. Nonetheless, each worked diligently and progressed considerably as a communicator. In the case of Nick Heys, we observed someone with a good deal of natural ability as a storyteller who was underutilizing storytelling as a communication tool. Through the coaching process, his awareness of storytelling's effectiveness increased dramatically. His post-coaching, story-based presentations were far more powerful than his former slide-centred discourse.

The coaching methodology constitutes a coherent whole: the journey inward to self-knowledge, the journey outward to self-expression, and—through practicing the tools and exercises—the journey to mastery. We should emphasize that each of the three leaders was successful because he was able to follow the journey through all of its phases. As this process is long, it is often the role of the coach to keep the leader focused on the task at hand, and to motivate the individual to persevere in the difficult moments.

Learning to communicate this way—using authentic stories from one's autobiographical material—is difficult, as is any form of mastery.

While the three leaders in question did make remarkable progress, each coming to understand and employ authentic autobiographical storytelling in their communication, none went "all the way" in this endeavour. When I see each of them speak now, I take some pride in our accomplishments; at the same time, I see more work to be done. One overriding lesson is that leadership communication and storytelling are hard work, and a lifetime endeavour. Becoming an effective communicator and leading with one's authentic story are tasks that require sustained attention—attention to constant telling, to ongoing practice, and to slow management.

Thus, learning to lead, learning to inspire, and learning to tell one's authentic leadership stories are endeavours that simply activities that are difficult to master. As Simmons states, it takes a lot of deliberate practice: "Only daily practice can achieve this level of deep learning. Martial arts masters don't read books about their art—they practice daily. Anyone who wants to master an art—and influence is an art—needs to practice." (Simmons, 2001 p. 234) The most important skill in developing one's leadership communication capabilities may indeed be perseverance. Speaking to this point, Leonard states that mastery is not necessarily reserved for the talented, but rather for who are "willing to get on the path and stay on it." (Leonard, 1991 p. 5)

Indeed, all three protagonists in the case studies underestimated the hard work aspect of leadership communication training. Generally, people tend not to realize how difficult inspirational storytelling is. Since all human beings tell stories, we tend to think it cannot be difficult to use this ability in a business or leadership context. As we have seen, however, the literature advises us otherwise. For example, Douglas Ready (2002 p. 65) opines that storytelling, "strange as it may sound, is hard work and very labour intensive for those who choose to try it." Wayson Choy (1998 p. 106) simply says that authentic storytelling requires a strong dose of "courage and passion...for it takes passion to tell your stories with heart and forbearance, and courage to tell them with unflinching honesty."

Mastering leadership communication—that is, learning to tell authentic personal stories, with the "unflinching honesty" that Choy describes, and truly taking the risk to speak from the heart—it is simply hard work. As I tell my clients, becoming a leader is difficult, just

as truly mastering any activity is difficult. If true mastery of tennis were easy, we would all be Wimbledon champions!

The greater the leader's commitment, the more effective the process

This conclusion is a corollary to the preceding point. Since authentic storytelling is hard work that requires courage, passion and honesty, it also requires a serious commitment of time and energy. In our examples, Tim Bilodeau was by no means the most natural or talented communicator, but he was certainly the most persistent in the process. He was the most successful of the three because he excelled at deliberate practice.

We have seen that every stage of the process requires a significant commitment. For example, the journey inward, to identify the leader's core beliefs and the stories around them, means spending significant time in introspection. Later in the process, slow management—using teachable moments to express oneself, to tell the who I am, who we are, what we stand for, why we are here, and where we are going stories that establish the leader's credibility and build the group's culture—takes time, patience and attention to detail. Those who succeed are simply consistent and relentless, as was Jack Welch during his tenure at GE.

In the three young companies we studied, the leaders had many things on their minds (survival, for example!), and many more urgent events in their daily lives than practicing leadership communication. Thus, we should keep our observations about their commitment in perspective. All three leaders bought in fully to the coaching endeavour, and all improved dramatically in their capacity to speak from the heart, to engage, and to inspire. At the same time, we see that Nick's day-to-day commitment was intermittent, and that Nilesh's efforts were intense but for too short a time. The case studies show clearly that each could have gone further. Even Tim, whose diligence was exemplary, would have progressed more had he kept his intense focus on practice for a longer period.

For those who choose the path and stay on the path, the process itself is truly transformational

To me, this is the most interesting and powerful of all the conclusions, and one of the truly important discoveries of my first decade of coaching leaders. The journey to authentic

leadership communication not only improves the individual's discourse; it actually has a transformational impact on the leader. This transformation happens because the journey is a creation.

When a leader makes the journey inward, to find the core values and the stories that encapsulate them, the experience is similar to writing an autobiography. As we have seen, Gandhi (Gandhi, 1982) asserts that every autobiography is a creation as well as a recollection. In my coaching, the reason I insist so much on the inner journey is to explode one of society's myths about leadership: that leaders have extraordinary experiences in their past that mould them for leadership roles.

In fact, what distinguishes winning leaders is not the extraordinary nature of their past experiences, but an extraordinary ability to reflect on themselves and their experience, and to learn from it—to use the lessons of their past to understand what they stand for and why, who they are, and how they came to believe what they believe. Not only do they learn the lessons of their past, but they turn those lessons into stories that they use to teach and inspire others. In other words, their leadership journeys are creations. Most often what we see is a leadership story that begins small and grows. As the leader creates the story, the story also creates the leader.

Tim Bilodeau certainly understands that he has been transformed by creating his leadership storyline. He is not a natural leader, or a natural storyteller, but he developed the self-knowledge and the self-confidence to let the stories and the message take over. As I see it, his self-knowledge and self-confidence were somewhat dormant. As he came to understand the meaning of his journey, and has he created his storyline, the story and the storytelling process also created him.

To demonstrate the impact of this process on Tim, I present excerpts from a long conversation in Boston on December 31, 2004. On this occasion, I spoke little; I merely listened to Tim and recorded his thoughts. In the passages below, I have skipped over much of the specific detail and left the parts where he speaks of the impact of our coaching journey.

Before this coaching journey, if you asked me about the future of Medicines for Humanity, I would have said that I saw myself doing more of the same, in other words, doing my small part to save the lives of children dying needlessly in impoverished countries. Then,

this process forced me to think about where I wanted to drive the organisation, and the story got bigger. As we moved forward in the process, I reconnected with what is really important to me, some things in my past that were always there, but I had not felt the immediacy of the emotion for a long time. It brought the immediacy of the emotion back. When all the feelings came rushing back, it inspired me to make MFH bigger and more special, to have a greater impact in the world, to see an even larger purpose. It extended my story and the story of MFH. I watched it become bigger, and I knew we had to grow into it...

When we started, I didn't have much time to think about a future story. It was about survival. In part, telling the story more effectively helped me attract more funds, and the organisation move in new directions. I saw new possibilities. I began to see that we could have a big impact in the world.

Today, the story keeps getting bigger. We are about far more than giving medicines; we are about doing whatever we can to save the children. Now, we have to get good at some new things. In a sense, we have to grow into our new story...

The entire process, particularly the recollection and reflection on my experience and my life, was amazingly re-motivating. We don't often question, in daily life, why we do what we do and where I beliefs come from. There is a tendency to keep doing more of the same. That's basically where I was. I knew I was doing good things, and I thought I would keep doing them. Reconnecting with the key events and people from my past, by bringing back the emotion that I felt at the time, I felt bigger things inside of me, and I started seeing bigger things for myself and MFH. We don't have to just do more of the same; we can see bigger, and do more. You get back your motivation through the power of recollection...

When I thought about those events in my life, about Collie, about Greece, and all, I hadn't thought about those things for a long time. It was always there, it is always there, but I hadn't felt them real and present in a long time. Thinking about it all began animating me in new ways.

From Tim's words, we see the transformational aspect of this process; the story is creating him as much as he is creating the story. From my perspective, when I began coaching this way, I thought it was about helping people communicate more effectively, about teaching them to tell a more inspirational personal story. In fact, somewhat inadvertently, I tapped

into a methodology that, in the best cases, extends far beyond communication. Learning to express themselves through their authentic autobiographical material often teaches people to see bigger. The coaching journey embarks them on crafting a story that can end up creating them.

The act of writing is important. It deepens reflection and accelerates the process

I discovered the true value of writing, and particularly writing as spoken, during the period of these case studies. Ironically, it was necessity rather than design—the constraints of distance in coaching Tim and Nilesh—that led to my extensive use of writing in the coaching process. As we have seen from their self-analysis in chapters 4 and 5.1, Tim and Nilesh both came to appreciate greatly the exercise of writing as spoken, and their spoken communication improved dramatically when we worked diligently at it. By contrast, in chapter 5.2, we observe that Nick and I had more frequent in-person coaching sessions, and we worked on his journeyline, his stories and his speeches together. Therefore, Nick never kept a journal, and I used written exercises far less with him than with the others. Consequently, his progress, while substantial, was less impressive than the others.

In fact, the three case studies taken together confirm a general rule that I have seen in my coaching endeavours: those who write the most reflect the most, practice the most, and thus develop their leadership communication skills the most. Numerous clients, among them Tim and Nilesh, have told me that the need to put their thoughts down on a page forced them to reflect deeply, in ways they would not have done in a face-to-face coaching session. As Nick and I did most of his writing together, his individual reflection was perhaps not as deep as it could have been.

Thus, the act of writing, in and of itself, aids the voyage of self-discovery. Whether embarking on the journeyline exercise, writing one's autobiographical stories, or composing a hypothetical speech, the act of putting pen to paper forces the individual to codify and clarify his thinking, to be more precise, and to search more deeply. Subsequent to these three case studies, I began to use writing far more extensively with my other clients.

6.2 IMPLICATIONS FOR MANAGEMENT

In this section, I discuss briefly some of the ways I have used the conclusions of this research in my own coaching work, and how we can apply them in general to leaders in organisations.

As leaders and as coaches, we should take the time to discover and build the leader's autobiographical storylines...

As leaders and as coaches, we should take the time to discover and build the leader's autobiographical storylines for they form the base for inspirational leadership. Deep reflection on one's autobiographical material leads to the discovery of one's core beliefs, values and guiding principles. It is only from this firm base of self-knowledge that a leader can express his authentic self and truly lead others.

Changing a leader's discourse from fact-based to story-based can transform his ability to inspire

In every case where I have helped a leader learn to base his communication more on personal stories and less on rational arguments, the term "inspirational" seems to creep into the vocabulary of the followers. We see this phenomenon clearly in the three case studies of this thesis, in the observations of the subjects, the researcher, and third parties.

Authentic autobiographical stories are powerful leadership tools that can take on a life of their own. Leaders and stories can help each other grow.

The most powerful dynamic I have ever encountered in my coaching career is one that we observe in the three case studies: stories and leaders create each other and help each other advance and grow. As Tim Bilodeau describes so eloquently in chapter 6.1, the leader begins by speaking from the heart and telling a deeply authentic story. In telling the story, it gets bigger still; along with the followers, the leader draws energy from the story, and is thus motivated to rise to greater levels of motivation and performance.

Stories create leaders as much as leaders create stories. If one studies the great leaders of history, one often observes a synergistic relationship between leader and story, just as we saw in our three case studies. In many instances, the leader's stories begin small, and leader and story then grow together. For example, in chapter 4, we saw this phenomenon in the biographies of Margaret Thatcher, Gandhi, and Martin Luther King. While not an easy skill to master, business leaders and coaches should tap into the power of authentic autobiographical storytelling, as we have done with Tim Bilodeau, Nilesh Nanavati and Nick Heys.

Changing the leader's discourse can change his energy and motivation

In much of my coaching work, the focus is on the leader's ability to inspire, on the effect his discourse produces on a group of followers. The research for this dissertation was an opportunity, because of the intensity and the length of my involvement, to make some in-depth observations about the leaders' reactions as well. Indeed, the three longitudinal case studies allowed me to witness directly the truly transformational impact this coaching system had on the three CEOs.

As we have observed in the studies, the three leaders in question were able to use the power of authentic autobiographical stories to inspire those around them. In addition, we can see from their commentary and from others' reactions that each individual grew in noteworthy ways. In hindsight, the underlying reasons for their growth are somewhat straightforward. As we saw in chapter 3, stories are the way human beings define themselves. Indeed, our sense of identity is framed by the stories we tell and come to believe about ourselves. Leaders draw energy and motivation from the authentic stories they come to tell and believe.

In this vein, the example of Nilesh Nanavati is particularly enlightening. Understanding some of the things he stood for—integrity, professionalism, listening to clients—and expressing these values through his stories, allowed Nilesh to connect with his followers in increasingly powerful ways. As he felt the positive reactions of the people around him, his self-assurance grew. At one point (January 2004, in personal communication with me), Nilesh described the "snowball effect" of learning to tell his autobiographical stories. As we saw in the case of Martin Luther King, Nilesh grew with the story, and the story grew with Nilesh. His increased self-confidence engendered new levels of motivation and

energy.

Use story-based discourse across all contexts, and take the time for slow management...

Observing the leaders of our case studies, and helping them prepare their communication in diverse arenas, has strengthened my belief in story-based discourse. Today, I am increasingly convinced that storytelling is the most effective way to present ideas in a variety of contexts: sharing knowledge with one's employees and colleagues, presenting to venture capitalists, selling one's product or service to clients, or making public statements. Certainly, the data from the case studies demonstrates that story-based communication can apply in a variety of settings, whether raising money for MFH, selling to AFA's clients, or inspiring the troops at an Emailvision festival.

In addition, each of the three leaders came to recognize the value of slow management, though none took the time to use it as much as I would have liked. Slow management is a valuable leadership tool for two fundamental reasons. First, as we have seen in each of the cases, much of the work of the leader happens off stage, where there are numerous opportunities to build high trust connections with the people one seeks to influence. Second, leaders grow through telling their stories, and slow management provides the best opportunities for practice.

6.3 LIMITS

While results of the case studies support the notion that this specific type of leadership communication coaching is indeed effective, we are aware of certain limitations of this research.

The first, and most obvious, of these limitations is that the sample size is small. From only three case studies, we can make no assertions about generalizability. While recognizing this criticism, we should temper it by saying that generalizability is not the goal of this type of action research. Rather, we have sought to shed light on the effectiveness of a coaching

system, and to generate some hypotheses about it.

Second, outcomes of the coaching process may be heavily dependent on the coach. We can see from the case studies that the tools and the process are powerful. However, we cannot be sure that other coaches, with divergent personalities, levels of engagement, and expertise will achieve similar results.

Third, the cultural environment may influence the outcome of the coaching process. Attitudes toward storytelling in general, and to personalization of one's stories, can vary widely across cultures. For example, in my work with Scandinavians, I have come to understand that people from these Nordic nations are often reluctant to talk about themselves, even when I am teaching them to sell their projects to venture capitalists or other potential investors. I recall one incident, in particular, when I was coaching a Swedish woman for the first time, and trying to get her to make her story more personal. I learnt an important lesson when she explained to me that this would be quite difficult for her, since "we are taught as children here that it is impolite or arrogant to talk about oneself."

While I chose the three subjects of the case studies in part for their cultural diversity, it is evident that we have tested the model in a limited number of cases. Even my overall cultural experience, having used similar techniques in some 25 nations, is insufficient to conclude that it would work everywhere. For example, we have little insight about how well this coaching methodology would work in Asian cultures.

Fourth, there are a multitude of relatively minor variables that may affect results, and we should at least mention some of them here. These would include:

- the size and maturity of the organisation
- the level of engagement of the participants
- the background and personality of the subjects
- the length of the coaching relationship

Again, there is often considerable variety in these variables in the three case studies of this thesis, but we would certainly learn more from a wider sample and more diversity.

6.4 AVENUES FOR FURTHER RESEARCH

We have broken some new ground by devising this specific coaching system and applying it in three in-depth, longitudinal case studies. However, both as researcher and change agent, I feel that we need to take this type of study far further.

As we see from the discussion of limitations of the research, it would be interesting to test the coaching system on a wider sample of participants, and in an ample variety of settings. I would like to see the process at work in a multitude of contexts, with leaders of different personalities, cultures, backgrounds, and organisational experience.

In addition, it would be interesting to see if this type of coaching could be applied to shorter time periods, or to group seminars. Most of the coaching I have done is similar to the three case studies presented herein, with intensive, lengthy, one-to-one relationships between leader and coach. Could we achieve a meaningful result using these techniques in a classroom situation? Also, it would be interesting to see how much could be accomplished in a more traditional coaching relationship. For example, could we produce a measurable result with weekly sessions during a ten or twenty week period?

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APPENDIX

An example of a document I sent to clients after the initial contact and to begin the coaching process.

A. STARTING THE LEADER'S STORYTELLING PROCESS

Engaging leaders have diverse and varied styles. One of the few characteristics they share is that they are exceptional storytellers. Harvard psychologist Howard Gardner, author of *Leading Minds*, points to storytelling as one of the leader's most vital skills, stating: "the story is a basic human cognitive form; the artful creation and articulation of stories constitutes a fundamental part of the leader's vocation." (Gardner 1995 p. 42)

Here is how I start the process of "getting out" your leadership stories, helping you become a better storyteller, and learning to use story more effectively to influence others—employees, customers, investors, donors, etc. It's important to realize that these stories exist within us all; we often need to discover or rediscover them, and then reshape them in order to tell them effectively.

I always like to emphasize at the start that we are not working on inventing tales that are not true in order to make the leader (you!) sound or look better. We are not trying to put a "spin" on life's events, as politicians often do. We are interested in the types of stories that all truly effective leaders tell. These are always authentic, based on their true-life experiences and values. When we do use communication techniques later in this process, it is never to change

the story or its meaning, but simply to make the delivery more powerful.

The exercise I ask you to do is one of introspection and self-discovery. With this exercise as a starting point, we begin to build your leadership storyline. Developing a clear storyline—one that you truly believe, express and embody—will make you a more effective leader.

There is certainly not one "magic" formula for beginning, though I do give some suggestions below. Since this undertaking is ongoing and iterative, the most important act today is to set the process in motion. As you come to understand the power of telling and personalizing your story, your proficiency will increase, and your capacity to communicate through stories will improve naturally. The paragraphs that follow will help you get started. These paragraphs are purposely a bit repetitive, stating related concepts in somewhat varied ways, using diverse imagery. As the process for each individual unfolds differently, take the ideas and the images that work best for you, and begin!

Leadership and influence begin with self-knowledge. Above all, it is important that you spend some deep introspective time, thinking and writing about the elements—the building blocks—that have made you who you are today. Set aside a few hours of uninterrupted time. Depending on how you work best, you may want to spend several hours thinking and writing, stop, then go back to the process a day or two later. It may take you a few "sessions" to complete the entire task described below.

A.1 Your journey: Uncovering "who I am"

I like to begin with an emotional journey line, a plot of your entire existence. What have been the high and low points in your life? Go all the way back to childhood—the earliest memories you have—and work to the present. On your journey line, mark the points where you had a lot of energy. What events and people were giving you that energy? When were the low points in your life? What was missing? What lessons did you learn in the bad times?

This exercise may seem a bit tedious or time-consuming. I emphasize its importance, though, as both my consulting experience and my research have convinced me that truly influential

leaders always have a particularly high level of self-awareness. In ancient Greece, above the Oracle of Delphi, the wisest of the wise, two words were inscribed: "Know Thyself". This is one of the simplest, and most difficult, tasks for all of us. The more you work on knowing yourself and knowing what is important to you, the more powerful your story will be, and the more it will resonate with those you seek to influence. That is why I ask you to begin your journey with an introspective exercise.

In order to inspire, to move others, you must first know the source of your own strongest convictions.

After you have plotted your journey line, think about the people, events and decisions that have framed you and your view of the world. Write down each of them. Reflect on each key moment, event, decision, or person. Think about what each one taught you, and how those lessons and understandings shape your worldview today.

Some of the important events may have happened a long time ago. For example, one person doing this exercise wrote: "I learned the importance of generosity and open-mindedness from my father, a doctor. At a very young age, I would occasionally accompany him on a house call in the impoverished suburbs of Santiago, where I observed his interaction with all types of people...These values—being open-minded, non-judgmental, and treating everybody the same and with respect—have influenced my life ever since."

A.2 Your themes: understanding "why I am here" and "what I stand for"

After you have thought about your life's influences, step back from the detail of this linear exercise and pick out some overriding themes. Our eventual goal is to craft some meaningful stories by reviewing the personal experiences that brought you to where are today. You are now in a position where you can, and want to, influence others. Why do you want to lead, how do you want to lead, and what do you seek to express to those around you? The answers to these questions are determined by themes in your past, and by the beliefs and values you

have come to hold.

If you get stuck in your thought process, take a break. But, when you come back to this exercise, you should ask these questions over and over: What are the values you live by? Where and how did you acquire them? Who are the key people, events and decisions that brought you to the point you are at today? With each pivotal person, moment or decision—what did you learn and how have these lessons shaped your view of the world?

I emphasize that it is not at all necessary to come up with extraordinary, earth-shattering, or Olympian revelations. My experience, research and general reading have led me to believe that great leaders are not necessarily people whose life journeys are more unusual than yours or mine. What often distinguishes them is the way they have learnt to reflect on, and use, life's lessons. They are better than other people at connecting where they come from—the experiences and lessons of their past—to who they have become and what they stand for today.

We all live and learn; we have meaningful experiences that shape us at every stage of our lives. We all have worldviews—ideas, opinions, values and assumptions about how the world operates. We all have fundamental beliefs. But most people don't consciously recognize these views and beliefs, and they can't trace their origins. Winning leaders can, and do. Effective leaders have a deep appreciation for where they come from—for the people, events and decisions that have written on the slate of who they are. Understanding these key elements of their past, and where their values come from, provides the base that makes them powerful teachers, communicators, and influencers.

To quote Noel Tichy, professor of leadership at the University of Michigan and author of *The Leadership Engine*: "Winning leaders consciously think about their experiences. They roll them over in their minds, analyse them and draw lessons from them. They constantly update and refine their views as they acquire new knowledge and experience. And they store them in the form of stories that they use not only to guide their own decisions and actions, but also to teach and lead others. When you hear leaders talk about their lives, you learn their teachable points of view." (Tichy 1997 p. 59)

The key point, then, is that exceptional leaders craft their histories into usable stories and continually revisit them for inspiration and guidance. They use their stories and their teachable points of view to inspire and influence others. Whether selling to customers, motivating co-workers, raising funds, or persuading investors, authentic and convincing stories are among the most powerful weapons in the leader's repertoire.

So...back to you and your mission! Write a document, of any length, based on the process described above—a document that speaks to who you are and what you stand for. If you write a long dissertation (which you should, or not, depending on how you work best), condense your writing to 3-6 pages in which you talk about the most important events and lessons of your "journey". We will use that document as our starting point.

To give you a sense of "where we're going" with all this, I want to get to the point where we are personalizing your experience and worldview in the form of a narrative or a series of vignettes, finding the storyline within you that is authentic and that will ring true to the people you seek to influence. No matter how well I know someone or how much we have worked together before this exercise, the "journey line" process always gives us new material and new clarity for telling the individual's story.

Usually, after several iterations, the story and the points we want to emphasize become apparent. We can then begin to work on the style, the techniques, and the contexts for delivering the message.

If all seems clear up to this point, begin the exercise described above. If you feel you need more explanation of why we should do this and what we want to accomplish, read on.

A.3 Why we do the "journey line" exercise

Through my study of leadership and coaching of leaders, I have come to see that there are characteristics and patterns that are almost always present in those who influence others in deep and transformational ways. Winning leaders have a strong sense of self, of "who I am", of "why I am here", "what are my core beliefs", and "what do I stand for". It is only from this

firm base of self-knowledge that they can effectively lead others. Their strong sense of self includes a clear concept of their own values and principles. "Here is how I want to live my life, what I want to stand for, and, by extension, what I would like this organisation (or team, or workgroup, etc.) to stand for."

Why is this deep sense of self so important to leadership? If you aspire to lead, it means you would like to inspire, influence and transform—to have a profound and meaningful impact on others. If you want to touch something deep in others, you first have to be in touch with the things deep inside yourself. Ultimately, it is your ability to tap into your own human spirit that will inspire others to act.

There is more than anecdotal evidence that effective leaders have high self-awareness and deep self-knowledge. For example, in *Primal Leadership*, Daniel Goleman cites a study by Eric Harter, CEO of Health Care Partners in Lexington, KY, which shows that the best performing CEOs have the highest self-awareness, not necessarily the highest IQ. (Goleman 2002 p. 94)

Warren Bennis, one of our most revered students of leadership, says that effective leaders find their "voice". They develop a desire to express themselves about the principles, values, standards, or ideals that are important to them. Where does this powerful message, this "voice" come from? To me, their clear voice, their lucidity about "why I am here" and "what is important to me", comes from having examined the key elements of their past and the lessons learnt from pivotal people, events and decisions. Outstanding leaders do not necessarily have extraordinary pasts. (For example, Martin Luther King was one of millions of individuals with similar backgrounds--oppressed Black people in the segregated South. But he was the one who was able to draw upon this experience, to find meaning and a "voice" in the events of his past.) Simply put: Everyone has a usable past; leaders just understand how to use theirs better. Leaders recognize the defining moments in their lives, and they learn to communicate the lessons through words and actions. The "journey line" exercise we do is about discovering or rediscovering the useable lessons of your past.

Winning leaders develop what Noel Tichy refers to as a "teachable point of view." These teachable points of view build the platform from which a leader is able to inspire and

influence. When an individual has clarity about "who I am", "why I am here" and "how I want to live my life," coupled with a desire to express herself—she then has a base for developing and delivering a powerful leadership message.

This teachable point of view must resonate with a group of cohorts or followers, and the best way to make the teachable point of view resonate is through a compelling story. A compelling story is one that the followers identify with, one that makes them want to emulate you. Your "who I am" story should motivate them to join a shared story, to co-create their story around yours. Your stories of the future should paint vivid pictures that show this future as an unfolding drama in which the followers are protagonists. Your stories should ignite stories in their minds.

A.4 What are some of the next steps?

I believe it is important to focus on your "journey line" exercise and not try to think too far ahead at this point. However, many of the people I coach in this process seem to appreciate knowing a more general context, having a sense for what comes next. So, by way of information, here are some of the subsequent themes and tasks we work on. They are not necessarily in order, as the sequence can vary based on the unfolding of a particular project and its priorities. In some cases, we work on all of them at once!

As the details of implementation are quite specific to each case, my only goal in this section is to sketch out the general themes and concepts of our journey.

A.5 Communicating as a leader, in multiple contexts

The journey line exercise embarks you on the road of examining the lessons of your past, finding your "voice", and clarifying your leadership goals and messages. Next, we work on communicating your messages to those around you.

Winning leaders are outstanding communicators. They communicate proactively, and constantly. They identify and express the principles, values, standards and ideals they wish to live by. They live their values, integrate them fully into who they are, communicate about them regularly and in any forum.

Effective leaders simplify their messages, and they are able to adapt these messages to multiple situations. Leaders communicate in powerful ways by committing themselves, implicating themselves personally in everything they do. When they speak, we understand what they stand for; they express a clear point of view. The stories they tell are convincing because they are grounded in personal experience and reflection on that experience. So, after we identify your stories and their themes, we work on delivery of the message, on simplifying and personalizing your speech in general, and your storytelling discourse in particular. And, we practice delivering the message in various "contexts".

If we work on speaking in different contexts, it is most certainly not to turn what you say into a "canned" and polished speech, but to help you become more effective at delivering your message—efficiently, authentically and from the heart. Our goal is for you to become comfortable in telling "who I am", "why I am here" and "what I stand for" stories in the diverse situations where you interact with those you desire to lead. Personalize these stories and tell them with authenticity and emotion. Speak from the heart. Authenticity and emotion are our bridge to other human beings. They are the basis for convincing and influencing others.

One of the things I have learnt in studying the way effective leaders communicate is that they speak from the inside out. They speak authentically, from both the head and the heart. As a leader, you inspire commitment by looking inward first, by becoming aware of what you want to say and by communicating a more personal vision of the future, based on a much more personal knowledge of the past and realistic experience of the present. Such a focus means initially ignoring your audience and focusing on your passion.

We practice speaking, and we practice a lot! We try to improve delivery, technique, timing, and instinct. We do all these things until they become natural. As Annette Simmons writes in *The Story Factor*: "When you trust your instincts, your story, and your audience, you can 'let

go' enough to give full attention to telling an authentic story." (Simmons 2001 p. 153)

A.6 Stories of group identity

After we have worked on telling your personal stories—compelling stories based on the lessons of your life and your values—we work on extending the stories to your group. Tichy might call this moving from the "who I am" story to the "who we are" story. If you are effective as a leader, people around you will share your basic vision and beliefs; they will want to emulate you. Therefore, we seek to take your "who I am" and "what I stand for" stories and expand them into "shibboleth" stories for your group. These are symbolic stories about who we are, what we believe, and how we behave. These stories reflect our values, goals, mission and vision.

The first step in this arena is defining your own leadership goals. Who are the people, what is the group you want to influence, and how would you like to transform that group? Define the possibilities; paint the picture of an ideal future. Often, I ask people to write the story of what this group will feel like in six months or one year. I then save the document and send it back to them several months later, looking to find out how we are doing!

A.7 Stories of inclusion

It is not enough to have your own clear vision or goals for your group. You must bring others along as co-creators and protagonists of the shared story.

Use your leadership goals and your images to provide the baseline—the vision, the dream for the future of the company or the group. You must always make the case for change. Even if our company, our business unit, our team, our "thing" whatever it is, is doing well, as a group we can, and should, strive to transform ourselves into something better for tomorrow. Leadership is always about change, about getting people to leave their "comfort zone" and venture with you into a future that may appear vague and uncertain to them. Your leadership

stories should paint a vivid picture of that future, and bring the others there, at least in their minds. Give them a sense of shared aspirations, a common quest, a sense of belonging to something bigger and nobler than they anything they could accomplish on their own. And, bring them into the story as true participants, as protagonists. Include them in the ongoing process of defining the common future, of building the dream with you. Inspire them to co-create their own stories with you.

This process involves spending a lot of time listening to and seeking to understand those around you.

A.8 Embodying the story

Learning to tell your story convincingly is not enough! Your actions must be consistent with the story you tell. If you do not live the life you describe, if your actions are not consonant with your words, if you do not "walk your talk", your story will be perceived as hypocritical, and any leadership effort will be difficult to sustain. Embodying your leadership story, truly living it, and living it visibly, is a constant occupation, and certainly one of the most important occupations of any leader.

Writing in the April 1999 issue of *Across the Board*, Howard Gardner cites Margaret Thatcher as an example of someone who truly embodied her story of transformation. When she became prime minister in 1979, there was a popular consensus inside Britain that had existed since the war—a consensus of powerful unions, moderate socialism, soft internationalism, and government intervention to control the "free" market. Thatcher's story was extraordinarily simple and powerful. Britain had simply lost its way; the socialist consensus was wrong.

The story she told so brilliantly was one of a return to individual initiative, to truly free markets, to a strong and proud Great Britain. Her story was all the more effective because she appeared as a symbol—the grocer's daughter, the self-made person, the no-nonsense, straightforward, rugged individualist—of the change she proposed for her nation. Only such a powerful representation could defeat the entrenched post-war consensus. Her persuasive

story, and her complete embodiment of it, transformed the way her fellow citizens perceived their world and their nation.

In my own leadership courses, we study many "larger than life" political and business leaders—Gandhi, Thatcher, Matsushita or Jack Welch, for example. However, we also find examples of leadership in the more mundane situations we face every day. Whether you are leading a small start-up, a five-person finance department, a football team, a group of volunteers, or any organisation, the lessons are the same. You have a tale to tell and an ability to embody that tale. I echo Gardner's conviction that these are the most important tools of the leader.

A.9 Modularizing and telescoping—learning to zoom around the core

Since inspirational leaders communicate effectively in all contexts, we practice adapting our vignettes, our "who I am", "who we are", and "why I am here" stories to various contexts, from long, formal speeches to short, teachable moments. We learn to tell our stories as modular vignettes that can be shortened or lengthened to meet the situation. I call this telescoping. Good stories are so clear and straightforward that they can easily be telescoped, expanded for ceremonial occasions or shortened to "terse telling" (Boje 1991). In all contexts, they retain their essential character.

In their discussion of strategy as narrative, Barry and Elmes discuss the need for leaders to learn to cut through the clutter of modern information overload and deliver concise messages in the form of short narratives: "We imagine that tomorrow's strategic authors will be more concerned with creating engaging, lively, and artful stories, reflecting increasing competition for stakeholder attention spans and reduced 'airtime.' Spoken accounts also may become more popular: stakeholders overloaded with e-mail and written documents are likely to take greater notice of verbally delivered accounts. It may be that strategists will rely on multiple stories that can be told quickly, easily, and joined in a variety of ways (instead of centralized

monolithic accounts)." (Barry 1997 p. 442-3)

While the core stories and their lessons remain the same, we will practice modularizing and telescoping to fit any occasion, from public interviews with television journalists to elevator pitches with complete strangers.

A.10 Perseverance, and the ever-evolving story

I always emphasize that the process is iterative, that we learn and improve with every step and each iteration. For most of us, learning to tell a persuasive story is difficult work. This observation may seem counterintuitive. Since we all know how to tell stories, since we have been doing it all our lives, we tend to think it should be easy in the context of business leadership. Not according to Douglas Ready, president of the International Consortium for Executive Development Research, who writes in the summer 2002 *MIT Sloan Management Review*, "Storytelling, strange as it may sound, is hard work and very labour-intensive for those who choose to try it." (Ready 2002 p. 65} His words certainly reflect my own experience! Above all else, learning to use storytelling effectively takes practice and persistence.

In *The Story Factor*, Annette Simmons, an articulate spokesperson for the power of storytelling, provides the following advice for those who seek to tell stories of influence: "The most valuable skill in developing influence is perseverance. Perseverance in finding the right story, understanding the stories of those you wish to influence, or even perseverance in telling a story over and over again. You will need it. Your personal story should inspiring enough to help, but ultimately the secret to lasting influence will require a connection with others who believe in you and believe in your ideals." (Simmons 2001 p. 154)

To my students, I often characterize our efforts to become leaders as an ongoing voyage of self-discovery, of trial and error, of learning from our successes and failures. The most effective way to persevere is to enjoy the journey!

So, it is important that we engage in a process that is in constant evolution. As we work on

becoming an authentic and inspiring communicator in a variety of contexts, we also revisit our journey line and continue our autobiographical introspection. As we move through the iterations of this process, you will rediscover your values and their origin, find new sources of insight in your past, and turn these insights into teachable points of view, and into inspirational stories.

To emphasize the ongoing nature of the quest for self-knowledge and authenticity as sources of the leader's inspiration, I quote Terry Pearce, from *Leading Out Loud*, with my underlining for emphasis: "[Authenticity] arises out of a discipline of self-discovery and self-expression and seems to be a lifetime process, even for spiritual teachers who practice authenticity as a life's work and who spend much of their lives in solitude." (Pearce 1995 p. 24)

A.11 Summary of the steps

1. Self-discovery & self-knowledge
2. Telling your stories
3. Simplifying and personalizing the delivery
4. "Modularizing" your stories to adapt them to different contexts
5. Embodying your stories—in visible ways
6. Extending and including—bringing others in as protagonists & storytellers. The stories of who I am, who we are, where we are going, why we are here, what we stand for, etc. must become a story of greater purpose that extends to others and inspires them to participate. Effective leaders create stories of greater purpose that they teach to their followers. These stories come to permeate their organisations.