

YOUR TERMS

COACHING, STRATEGY, SUCCESSION, PHILANTHROPY

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SCHOOLS *of* COACHING

PART 1

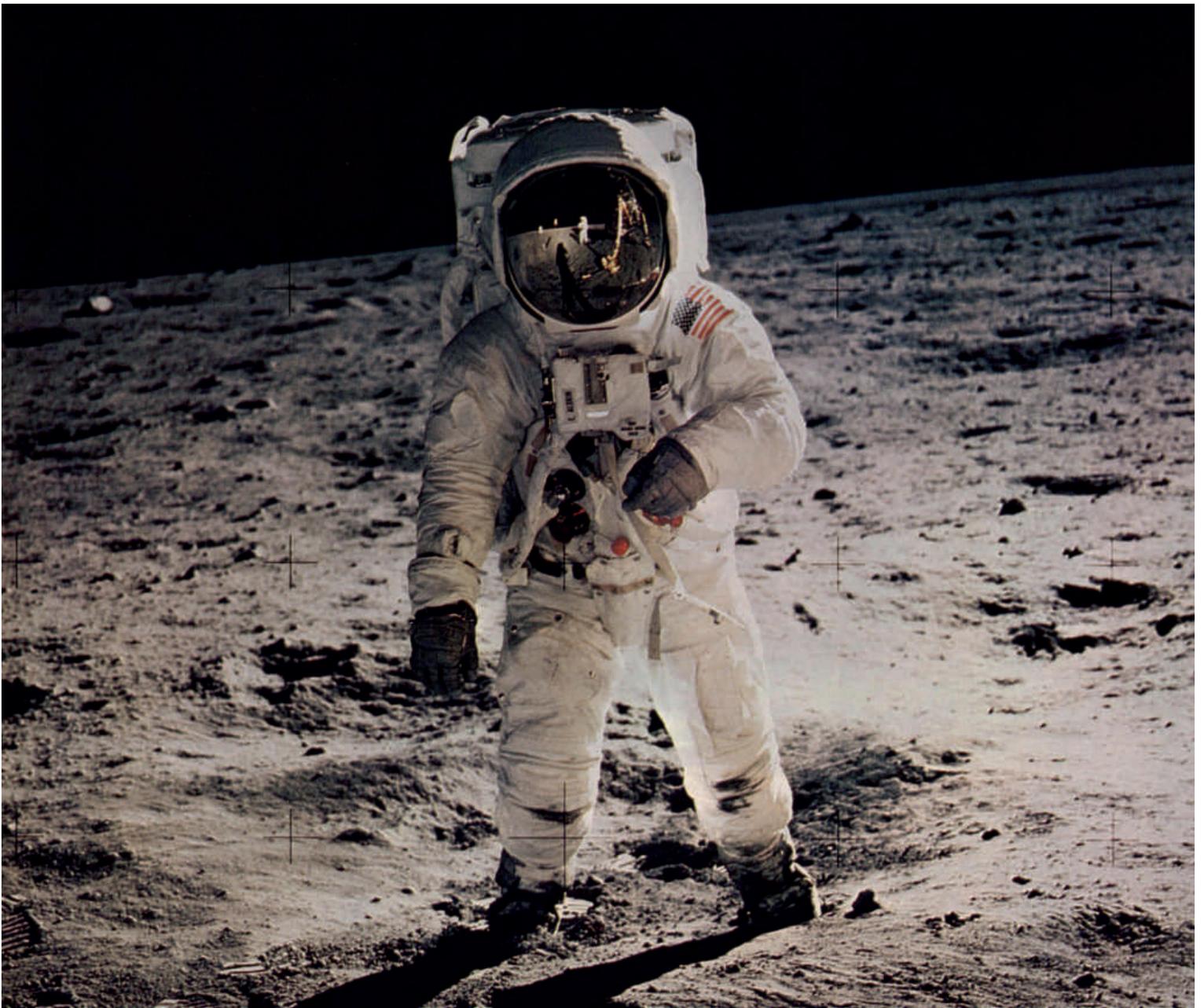
Page 10 SUDDEN VICTORY: THE POWER OF VISION

Page 12 MATT MAREK: ITS NOT ABOUT THE KNOWLEDGE

Page 16 THEN, WHO'S DRIVING THE BUS?

Page 18 (ALMOST) TURNED MYSELF INTO A MACHINE





PUTTING MEN ON THE MOON

“We will put a man on the moon by the end of the decade and return him safely to earth.” – proclaimed JFK in 1961. He did not live to see it, but his vision was fulfilled when on July 21, 1969 Neil Armstrong and Buzz Aldrin stepped on the surface of the white planet.

The moon landing was an audacious dream that was realized with a goal and a plan. It stands as living proof that virtually any dream can be materialized with a strong desire, an appropriate plan and people who persist until they get the job done.

Our role as entrep coaches is to help you articulate your audacious dream, assist you in creating a blue print for its achievement, and help you navigate and stay the course until you make this dream a reality.

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YOUR TERMS

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STEVE PREDA

Steve (Istvan) Preda chairs two executive peer groups with Vistage International in the Richmond, Virginia area and he helps CEOs and executives reach the next level of success, autonomy and fulfillment.

Before moving to Richmond in 2012, he had built and sold a leading M&A consulting firm in Central Europe. Steve sat on the boards of several European companies and of IMAP Inc., a global investment-banking network. He started his career with KPMG in London and later ran the PR and Corporate Finance departments of ABN AMRO Bank in Hungary.

He graduated with a Bachelor's degree in accounting and holds professional qualifications from the CFA Institute and the leading Canadian and UK accountancy bodies; and had studied in the Netherlands and Greece. Steve is a licensed investment banker in the United States.

Steve lives with his wife and four children in Glen Allen, Virginia and in his free time blogs, coaches little league soccer and plays tennis.



JERI L. TURLEY

Jeri Turley is the president and principal of BCG Companies, that was founded in 1988 to serve the specialized life insurance needs of affluent families and corporations.

Jeri works closely with clients and their advisors throughout the wealth transfer process for high net worth individuals and families, as well as executive benefit and succession planning for public and privately held companies. Jeri also coordinates and supervises the case design, underwriting and servicing efforts of BCG staff members in Richmond and in Chevy Chase.

Jeri began her career with BCG Companies in 1994. She is a registered representative of M Holdings Securities and is a member on M Financial's Technology and Diversity Committees. Jeri earned a BBA in International Business and Economics from James Madison University. Jeri is currently serving as a director for the Association for Advanced Life Underwriting (AALU).

Jeri is married and the proud mother of three active boys. In addition to time spent in her local community, Jeri enjoys spending time with her children, attending sporting events and reading.



DAVID QUICK

David Quick is a Vistage chair, speaker and Culture Index licensee, in Bloomington Indiana.

After receiving his BS in mathematics from the United States Naval Academy, David served eight years active duty as a Surface Warfare Officer, including deployment during Desert Storm and as an Instructor at the United States Naval Academy.

David has over 20 years of sales and marketing experience in the medical diagnostic marketplace, working for companies including Bayer Corporation, Johnson & Johnson, Boehringer-Mannheim and Roche Diagnostics Corporation; he has broad experience in both small and large companies.

Highlights include: CEO of two early-stage companies, Vivax Medical Corporation and HydroMassage, helping them achieve rapid growth within 6 months. He also served as Executive Vice President of Sales & Marketing of CCS Medical Holdings, Inc. which grew from \$85MM to over \$500MM during a 4 year tenure.

David lives in Bloomington with his wife and two sons.

SCHOOLS *of* COACHING

PART 1

There are many different brands of coaching and it can be confusing for outsiders and insiders alike to make sense of what they are about. Hyperbole, the overuse of adjectives, and in some cases plain BS, further cloud the view. I attempted to decipher what is really behind these "schools" of coaching and share it with you in layman terms. Let me know how I did.

TRANSFORMATIONAL COACHING

From Tricks & Tips to Paradigm Shifts

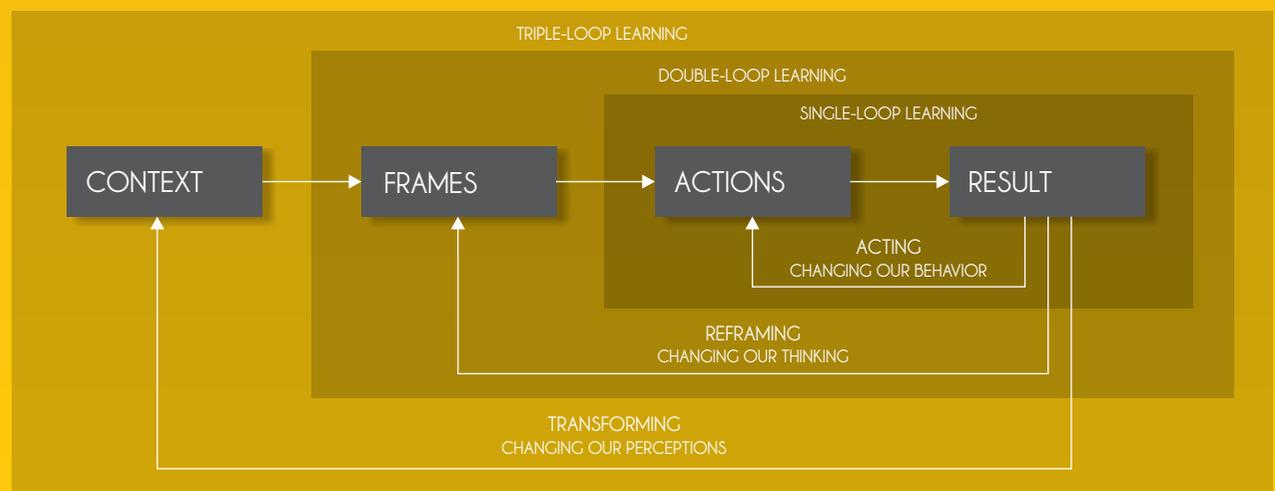
“Transformational Coaching” was coined by *Robert Hargrove*, former venture capitalist and rock star executive coach to Fortune 500 companies and government. Hargrove’s stated mission is to help create businesses that are productive while “nurturing the human spirit”, i.e. allowing people to learn and grow as individuals.

Hargrove’s coaching concept is built around two main ideas: The “*three loops of coaching*” and the “*rut stories and rover stories*” theme.

Triple-loop learning transforms people by empowering them to create a shift in their context, or point of view about themselves, to help them behave with integrity in conflict-situations and produce the results they desire.

Double-loop learning enables people to reshape their thinking patterns by shifting their goals and/or strategies to break through impasses and learn new things.

Single-loop learning is continuous incremental improvement (tips and tricks) in current executive practices.



One core approach in transformational coaching is helping people surface, question and reframe the stories they tell about who they are. These stories shape, limit, and define our way of being. There are two basic kinds of story – rut stories and river stories.

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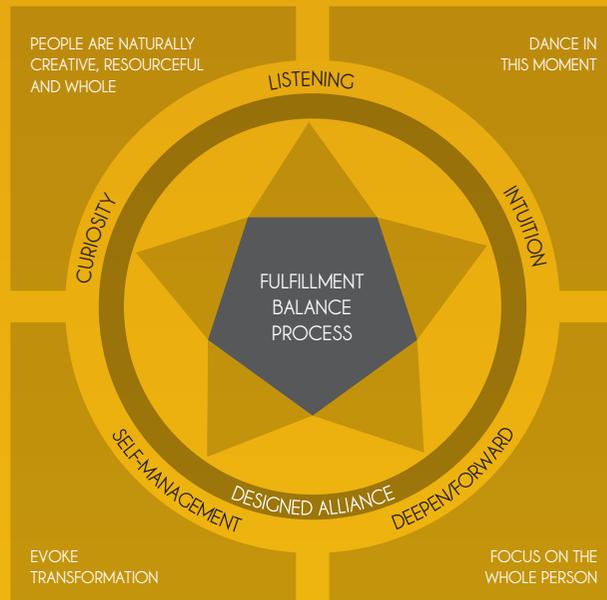
Rut stories keep people in old ways of being and thinking patterns and result in inaction. River stories are generally those of personal growth, self-renewal and transformation. The coach seeks to transform rut stories into river stories by helping people realize that they are the authors of their stories and that they can choose to tell stories that open up new possibilities for themselves and support them in fulfilling their potential.

CO-ACTIVE COACHING

Connect, Contemplate, Catalyze

Co-Active coaching helps clients develop positive new neural networks, respond more calmly to stress, make choices more easily, and access much more of their creativity, leading to more effective, successful and fulfilling lives. The Co-Active model was originally developed by *Laura Whitworth*, a peer and rival of Thomas Leonard, the “Father of Modern Coaching”, in the early 1990’s.

The “Co” in Co-Active suggests relationship, connection, intimacy and collaboration. Thus, the “Co” in us is curious, listens deeply, hears nuance, holds space for others, intuitively nurtures.



Source: The Coaches Training Institute <http://www.thecoaches.com>

The “Active” in Co-Active stands for power, direction, action and manifestation. So, the “Active” in us is courageous, has clarity and conviction, takes charge and achieves goals.

The magic happens in the dance between “Co” and “Active” – action that arises from presence, deep relationship and context... and presence that is channeled into dynamic action and contribution. Balancing and blending these energies allow us to move out of an “either/or” paradigm, into a “yes/and” paradigm.

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Robert Hargrove



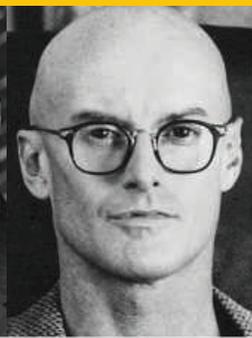
Laura Whitworth



Sir John Whitmore



Fernando Flores



Ken Wilber

GROW is well suited to working in goal-directed areas of sports or business, but may be less useful for exploring philosophical aspects of life, needed for careers or life-coaching conversations.

THE GROW MODEL

Set goals and achieve them

The GROW model was developed in the United Kingdom by *Graham Alexander* and *Sir John Whitmore* and was used extensively in corporate coaching in the late 1980s and 1990s. GROW is well suited to working in goal-directed areas of sports or business, but may be less useful for exploring philosophical aspects of life, needed for careers or life-coaching conversations.

- G: Goal.** The end point, where the client wants to be. Must be clearly defined.
- R: Reality.** The Current Reality of the client. What are the Challenges and the distance from the Goal?
- O: Obstacles and Options.** What are the Obstacles to achieving the Goal and the Options for dealing with them?
- W: Way Forward.** The Action Steps derived from the Options to reach the Goal.

In order for a problem to exist in coaching terms, there has to be two elements present. Firstly there has to be something that the client is trying to achieve – the Goal. Then there has to be something stopping them to achieve that goal – the Obstacle(s). Using GROW automatically breaks a problem down into these component parts. GROW can be used on technical problems, issues regarding processes, strategy questions, interpersonal issues and many more.

By quieting self-interference, they were able to tap into their natural abilities with greater ease. Much like Luke Skywalker did, when he allowed the “Force” to guide him when practicing fencing against the mini Death Star, in the original movie.

THE INNER GAME METHOD

Quiet your self-interference

GROW was influenced by the Inner Game method developed by *Timothy Gallwey*, a tennis coach, who noticed that giving traditional instructions yielded mixed results. However, he discovered that if he simply invited his student to focus their awareness on their strokes as they were, technique evolved naturally and seemed to self-correct. By quieting self-interference, they were able to tap into their natural abilities with greater ease. Much like Luke Skywalker did, when he allowed the “Force” to guide him when practicing fencing against the mini Death Star, in the original movie.

Gallwey’s resulting book the “Inner Game of Tennis” sold two million copies and has become one of the most influential coaching books of all time.

ONTOLOGICAL COACHING

Enhance your Way of Being

According to the Oxford Companion to Philosophy, “Ontology is... the science of being, embracing such issues as the nature of existence and the structure of reality.

The discipline of Ontology has emerged from the integration of 20th century developments in the biology of cognition, existential philosophy and the philosophy of language. ***Ontological coaching enables a coach to observe and work constructively with language***, emotions and the body, to develop new perspectives that generate more effective behaviors.

The key figure in establishing Ontological Coaching was *Fernando Flores*, a Chilean engineer, philosopher,

Ontological coaching enables a coach to observe and work constructively with language, emotions and the body, to develop new perspectives that generate more effective behaviors.

entrepreneur and politician. He became the finance minister in the government of Salvador Allende and then spent three years as a political prisoner after the military coup of General Pinochet. Forced into exile, he moved to Palo Alto, California, and worked as a researcher at Stanford University and obtained his PhD at UC Berkeley. There he developed his work on philosophy, coaching, and workflow technology, influenced by Heidegger's existential philosophy, Maturana's ideas on perception, cognition and language, and Searle's Theory of Speech Acts.

In Ontological Coaching the coachee's roles are to:

- (i) Provide safe context for his client to learn new distinctions that expand his capacity to observe;
- (ii) Inquire with the client about how shifts can occur in each domain of language, emotions and body, to generate constructive new perspectives for the coachee;
- (iii) Listen to the ways the coachee is both using and not using language, and how these may be limiting how he or she is observing their circumstances; and to
- (iv) Explore, understand and shift how the client is restricted by some fundamental aspect of his emotional existence.

By understanding precisely how coachees use language, emotions and physiology to structure their reality, an Ontological Coach can intervene to support clients to become better observers and develop a more constructive and less limiting reality. Shifts in language, emotions and physiology allow for the formation of new perspectives, which can open new pathways for effective action and the accomplishment of desired outcomes that were not previously available.

INTEGRAL COACHING

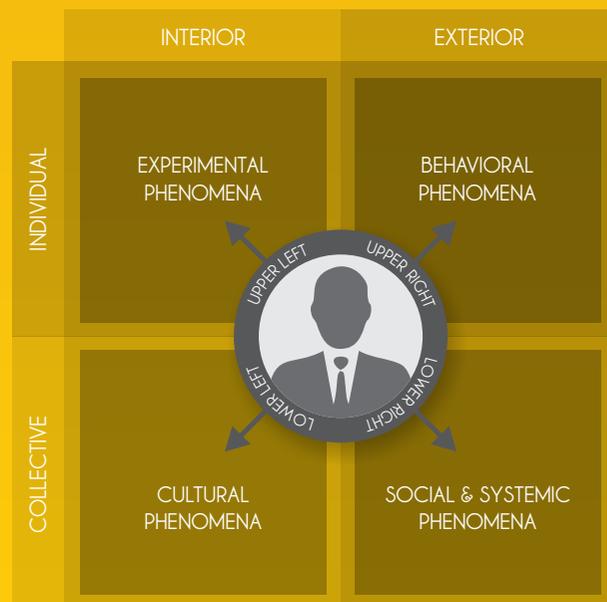
The "Theory of Everything" Approach

Integral Coaching's frameworks and developmental principles span from Integral Theory originally developed by Ken Wilber (1949–), American writer and philosopher.

The word integral means comprehensive, inclusive, non-marginalizing, embracing. Integral approaches to any field attempt to include as many perspectives, styles, and methodologies as possible within a coherent view of the topic. Integral approaches are "meta-paradigms," or ways to draw together an already existing number of separate paradigms into an interrelated network of approaches that are mutually enriching.

Ken Wilber

Integral Theory waves together the significant insights from all the major human disciplines of knowledge, including the natural and social sciences as well as the arts and the humanities. By acknowledging the multifaceted nature of complex issues and problems, Integral Theory creates a space



Source: Sean Esbjörn-Hargens: An Overview of Integral Theory (2009)



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By acknowledging the multifaceted nature of complex issues and problems, Integral Theory creates a space for multiple perspectives to contribute to the discovery of viable solutions.

the client's position on the "AQAL map" as the coach's road map for building new capabilities with their client, based on the client's needs rather than the coach's biases or preferences.

To be continued next month...

for multiple perspectives to contribute to the discovery of viable solutions.

Wilber describes the current state of the "hard" sciences as limited to "narrow science", which only allows evidence from the lowest realm of consciousness, the sensorimotor (the five senses and their extensions). What Wilber calls "broad science" would include evidence from logic, mathematics, and from the symbolic, hermeneutical, and other realms of consciousness, including the testimony of meditators and spiritual practitioners. Wilber's own conception of science includes both narrow science and broad science, that he calls "integral science". According to Wilber's theory, narrow science trumps narrow religion, but broad science trumps narrow science.

Ken Wilber's AQAL is the basic framework of Integral Theory. It suggests that all human knowledge and experience can be placed in a four-quadrant grid, along the axes of "interior-exterior" and "individual-collective" (see *previous page*). Integral Coaching uses

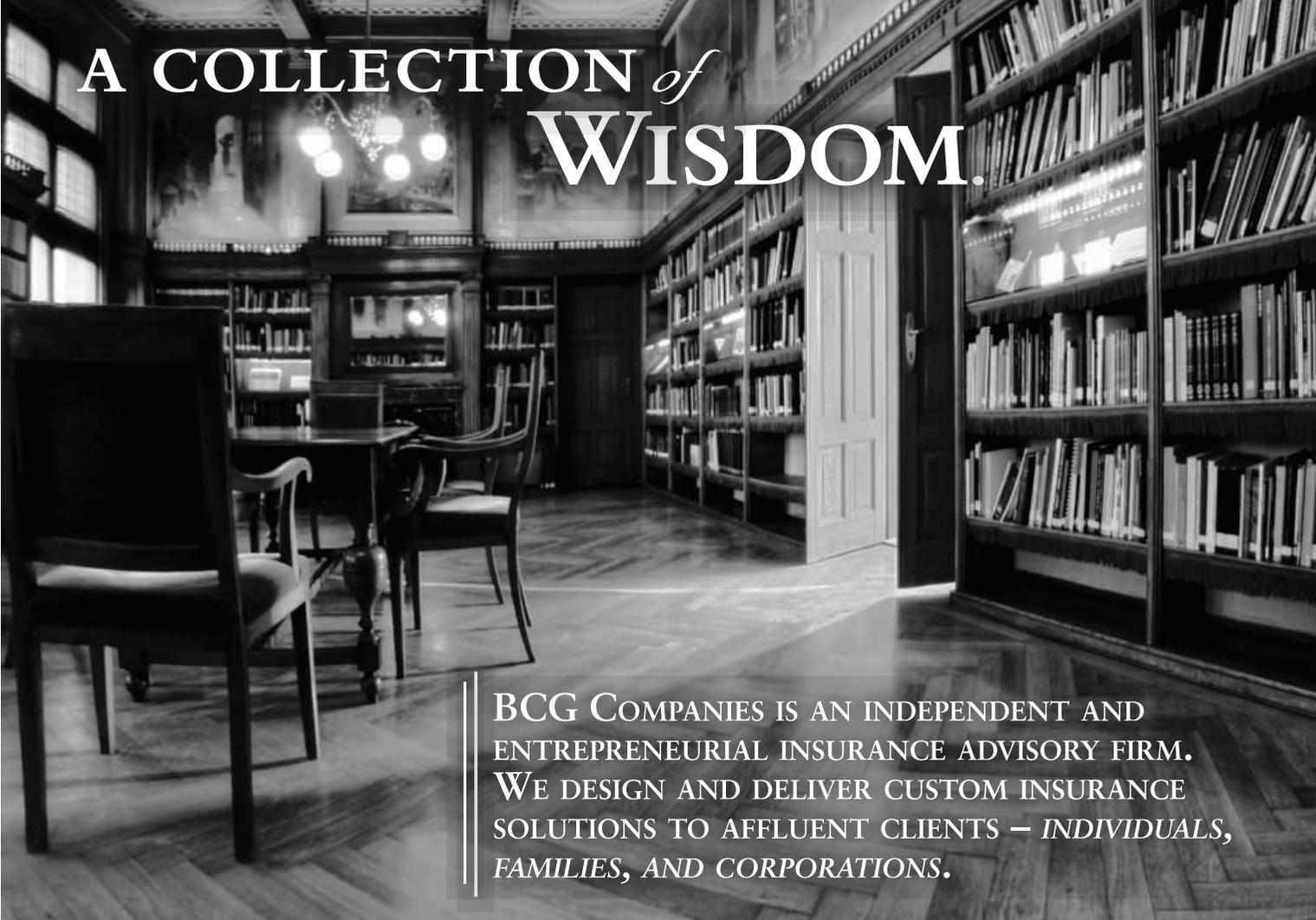
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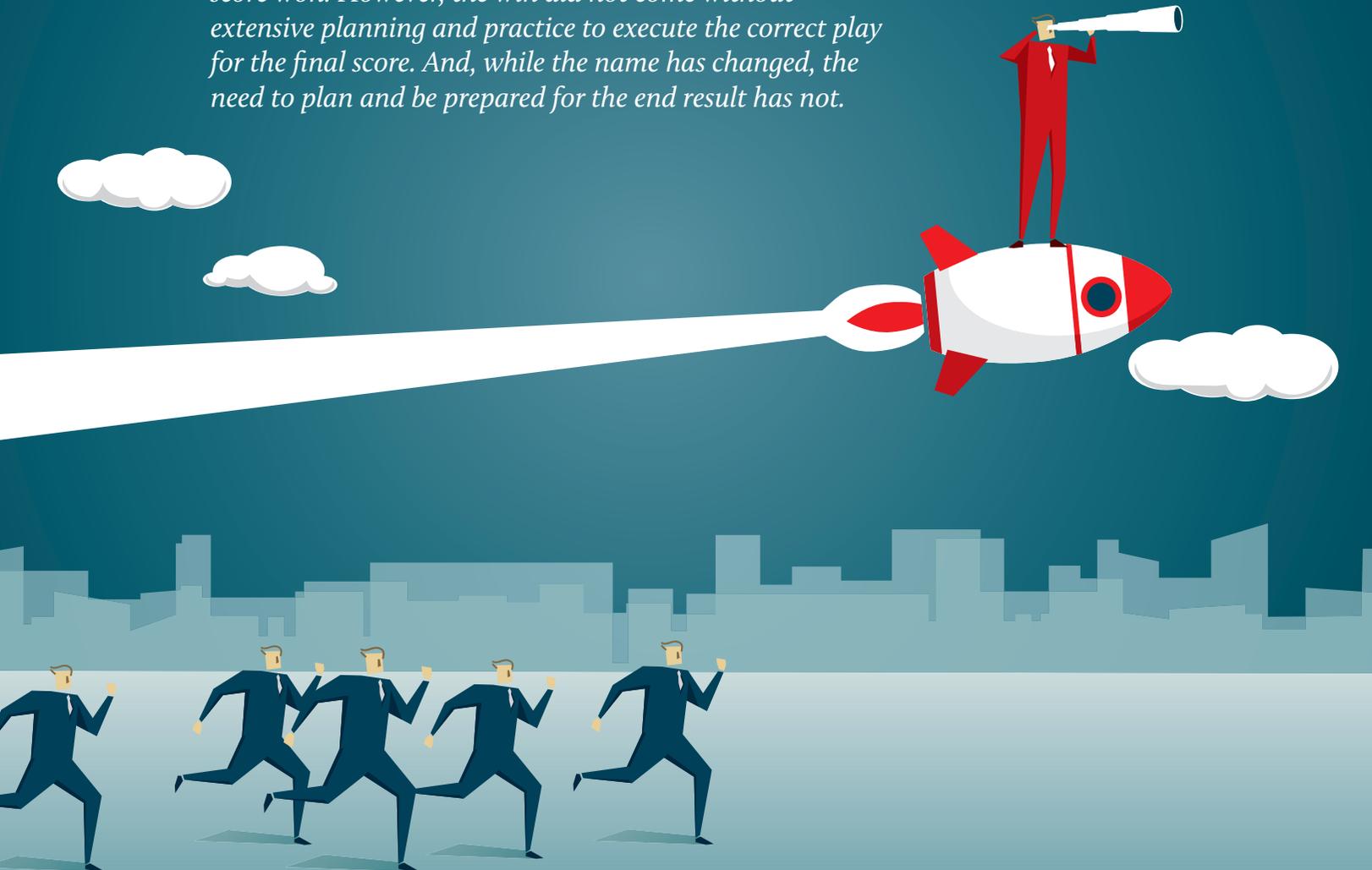


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Sudden Victory

THE POWER OF VISION

Picture a last-second attempt to win a game. We know it today as Sudden Victory. During my younger years it was known as Sudden Death – the last team, man or woman to score won. However, the win did not come without extensive planning and practice to execute the correct play for the final score. And, while the name has changed, the need to plan and be prepared for the end result has not.



Planning for business and family SUCCESSION is no different. The decision to grow and position a business enterprise beyond its Founder, transfer a business to a next generation, address the continuity of client relationships and commitments, and the need to protect and transfer family wealth, all require meticulous planning and execution.

When I entered my business over 20 years ago, the day-to-day focus was working “in” the business – growing it, developing our team, and becoming best in class for the services and products we provide. We were effectively building our brand and little time was spent talking about the next generation and working “on” the business – long-term governance, outliving the Founder, future shareholders, etc.

As we entered the later years of our Founder's business life cycle, we realized we needed to address our own planning if our business was to survive. It was time for us to heed the advice we give our clients and start the conversation.

Sudden Death succession planning – waiting until the last minute to make decisions and implement a strategy – typically does not generate a favorable outcome. When the realization hits that a plan is needed, it is usually too late to start one. Just like the team that needs to practice the last-second play time and time again, succession planning and practice should be gradual and thoughtful with constant sharing of information, knowledge, and perspective so that the plan is essentially a non-event when it happens. My business and personal experience dictate that business and family leaders who begin the succession planning process early create end results that make for better long-term business organizations and thoughtful transfer of wealth and business enterprises.

While not all planning is the same, there are core considerations:

Family:

- What do you want your legacy to be?
- Who is on your advisor team?
- What are your goals?
- How do family and philanthropy fit into the equation?
- What is your timeframe?

Business:

- What will future ownership look like?
- Will the business be sold or passed to family members/internal team?
- How does the plan impact employees?
- How does the plan impact clients?
- What is your timeframe?

As we entered the later years of our Founder's business life cycle, we realized we needed to address our own planning if our business was to survive. It was time for us to heed the advice we give our clients and start the conversation.

Just as in the sale of an idea, concept, or product to solve a client's problem, the sale of a business or the transfer of wealth can be accomplished if all considerations are thoughtfully explored with the parties involved. In other words, there is no “close” needed in the sale because the sale is a natural consequence of an educated process and deliberate strategy. If the same process were applied to the sale of a business, the new owners would offer to buy and not have to be sold. Likewise, ensuring a personal wealth legacy that translates into stability, stewardship and opportunities for businesses, families, and charities may be the biggest gift you can give!

There is no “close” needed in the sale because the sale is a natural consequence of an educated process and deliberate strategy.

Rather than wait for Sudden Death, take the time to do the proper planning and practice to strive for Sudden Victory. Business and family matters are serious stuff. It is easy to ignore and assume you have plenty of time to address succession planning. There are countless examples of families and business owners who waited and did not implement an effective plan because they did not have time. Don't assume it will not happen to you.

Attention now is not only good succession planning; it is plain good business.



JERI TURLEY
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Coach-Approach Leader of the Month

“ITS NOT ABOUT THE KNOWLEDGE”



Matt Marek is the founder and owner of Good Neighbor Community Services, a fast growing healthcare company delivering Intellectual Disability and Behavioral Health services in Virginia, and remote psychiatric counseling across the nation, with the help of video technology.

YOUR TERMS (YT): *Matt, why did you become an entrepreneur?*

MATT MAREK (MM): It was in my blood. When I grew up, my dad owned a furniture company and I travelled with him and his bookkeeper to trade shows. During these trips he coached me about business and life.

My dad understood the value of a motivated and collaborative team. He always looked to hire young people with potential that he could take under his wings and coach up. I recall him taking two single-parented athletes, a starting quarterback and a point guard as apprentices. His bookkeeper later graduated from UNC's business school. Both of them still keep in contact with my father.

I learned from my dad that good leaders take care of you as an individual – it's not just about business.

I learned from my dad that good leaders take care of you as an individual – it's not just about business. The other thing I picked up was that it is possible to get people to collaborate and create bigger results together. This realization sparked my interest in becoming a leader myself.

Throughout my youth, I helped to lead several baseball teams to championships. I learned about creating collaboration and getting the best out of people notwithstanding their race, upbringing or my personal opinion of them. These early sporting successes built up my drive to achieve, but I first had to figure out a purpose.

YT: *How did you go from being an accountant to founding a mental health and disabilities business?*

MM: I had no idea what to major in college. I researched the careers of Fortune 500 CEO's and found that many had backgrounds in accounting, so I decided to major in that. It wasn't a first love, but I found it interesting. I figured out that finances were a foundation for survival for any business and learned that a robust

I routinely gave out my cell phone number to customers, having discovered personal responsibility as a competitive advantage.

accounting function will create a solid structure in business as well as in life.

Coming out of college, I talked to KPMG, but opted to join a Richmond-based home healthcare company called Care Advantage, owned by Debbie Johnston. Debbie paid half of what KPMG offered, but I could be coached by her personally and learn from her team. This job taught me about budgets, contracts, rates and negotiations and how an entrepreneurial company survives. I had the chance early to negotiate with strong partners, such as hospitals, which were critical to our business.

I also learned about accountability: if you promise something, you must deliver. If I didn't deliver, it was my personal reputation that suffered. Sometimes lives could be in jeopardy if certain staff placements did not go ahead on time – in the healthcare industry, staffing is always a major liability to patient care.

The first breakthrough came when I won back a contract for the company that had been lost years earlier. I offered my prospect to be personally available to handle any problems and I was put the test the first week, when a conflict led to the delay of a nurse placement and I got the call. I had to make my case for the resources and negotiate with my colleagues for the resource I had personally committed to them. From then on, I routinely gave out my cell phone number to customers, having discovered personal responsibility as a competitive advantage.

YT: How did you get started in business?

MM: I was negotiating a contract with Central State Hospital, where my mother had worked, and took the team out for lunch. They kept talking about the need for housing support for intellectually disabled people who were leaving state facilities. This resonated with me as my grandparents had informally adopted into our family an intellectually disabled man, whom they

I grew up believing that intellectually disabled people can contribute if they are given the opportunity.

supported and found useful employment for. I grew up believing that intellectually disabled people can contribute if they are given the opportunity.

After spending a year researching this opportunity I approached Debbie asking her to support a venture to provide homes for ID people. She turned me down numerous times, but eventually relented and became a 20% owner of my company. She didn't do it for the money, but to pay forward the help she had received from a business partner early in her entrepreneurial career. 18 months later, after the business took off, she let me buy her out. She helped me own my destiny at the age of 25 – I could not have asked for a fairer deal than that. She still remains a close friend and mentor.

YT: What do you believe is the role of coaching for an entrepreneurial business?

MM: You can educate people about how to run a business, but they will never really get it until they experience it. A great coach will listen and guide the mentee to find his or her own answers and solutions. If you do something for someone else you are enabling, not teaching. The worst parents are the ones that do everything for their children; co-dependence and enabling are the two most detrimental things that can happen in any relationship. The pampered and enabled person will never feel whole in making decisions and will be prone to second-guessing, while people who are allowed to fail will learn to make decisions. Even after they stumbled, a good coach will continue to ask questions on how they got there and how they could move forward. FAIL stands for First Attempt In Learning. This Socratic process allows the coachee to learn faster and deeper through doing his own work.

A great coach will listen and guide the mentee to find his or her own answers and solutions. If you do something for someone else you are enabling, not teaching. The worst parents are the ones that do everything for their children.

YT: Is there a limit to what a coach can do for someone?

MM: There is, when the coach no longer has enough experience in the area. When he has helped his coachee to outgrow him will he know that he has been successful. It is hard in any relationship when that happens, be they business or personal. The most important is our sense of self, which should never be derived from someone else. I had a psychology professor who had the ancient Greek aphorism “know

This is why people get stuck and stop growing. They are afraid to move out of the comfort of the thing they are good at and defined by.

thymself" placed on the overhead projector in his classroom for his students every day.

(YT: *In Plato's dialogues, Socrates explains that "understanding oneself would enable thymself to have an understanding of others as a result", and that "people make themselves appear ridiculous when they are trying to know obscure things before they know themselves".*)

Seeking to know ourselves, is honing our curiosity. When we feel that we had it all figured out, we get bored with the process and stop growing. But, if we don't know ourselves, we cannot help others. While we are on a quest to discover ourselves, we are discovering new things about life. We may find that we have an interest in something else, but we may be afraid to admit it, as it would require us to start over.

YT: ***Are you in this kind of transition these days?***

MM: I am being challenged and seek out being challenged. I am curious of what I can do, what more I can offer in the field I am in, and what I know about my field that I can offer to others outside of my field.

In business, soon if you can't be more emphatic with customers, your function will be automated. There is no reason any more to interact with other people unless you have a positive experience.

YT: ***How do you create the process of channeling and scaling your experience to other areas?***

MM: It is something you intuitively have to find. One of the most important trends in business is providing customer experiences through design. If you can allow people to experience something in a new way, you have something to offer. Apple created the awareness with the iPhone, where it was not the function but the feeling that the object created that mattered. You could feel the function through the simplicity of the user experience. Great design makes experiences accessible. It eliminates the feeling of being overwhelmed and saves energy. This is where businesses are going: providing visual, auditory and tactile experiences. It is not always as much about the function that the phone can do but the feeling it provides.

Great companies know how something feels when we interact with them. They now are measuring sounds in hospitals and a given setting may have 40 or more different sounds in an area. Our auditory limit is 7 sounds, so we are overwhelmed in a hospital setting. And we can't consciously control how we receive sound, as we can't just shut down our hearing. The airline industry has focused on that. They don't want you to feel overwhelmed and feel more comfortable, so they use the same tone to announce everything to you on your flight. This transfers energy to a more absorbent sense, our vision. That's why we look for a visual reference after we hear the "ding."

Foods for NASA are now designed based on astronauts' individual childhood preferences to reduce homesickness. Food now can make an emotional impact based on personal preferences. This is an experience given to astronauts to allow them to feel in a certain way. In business, soon if you can't be more emphatic with customers, your function will be automated. There is no reason any more to interact with other people unless you have a positive experience. Companies like Chick-Fil'A and Starbucks would lose customers by automating, but McDonald's may continue to thrive.

YT: ***How is coaching going to help you build your future businesses?***

MM: Great coaches understand that products and services may provide greater experiences. Coaches have the ability to understand what customer experiences look like and help guide businesses how to meet employee and customer needs. Great coaches understand people and the future will change what people demand.

YT: ***How are coaches in a unique position to help coaches figure that out?***

MM: By bringing a third party prospective. Business leaders are often immersed in a non-diverse environment: they don't take enough breaks and rarely have the time to expose themselves to industries other than their own. Coaches can provide support to leaders by immersing themselves in other industries, employee and customer experiences and provide alternative viewpoints. The coach's role is changing. Coaches used to provide management and leadership knowledge. Now information is available without limit on these subjects. It is not about the knowledge, it is about the perspective.

Coaches can provide support to leaders by immersing themselves in other industries, employee and customer experiences and provide alternative viewpoints.



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Harnessing the Power of Your Herd

THEN, WHO'S DRIVING THE BUS?

We have all heard the proverbial “get the right people on the bus” and sometimes even further advice of “get them in the right seats on the bus.” These come from Jim Collins in *Good to Great* and remind us to think First Who, and work on getting the very best people into our organizations and to get them into the right jobs. As I work with CEOs and business owners every day, I use these metaphors to drive home the importance of hiring and putting individuals in the right roles. But often I can tell if it goes in one ear and out the other, as most of us have either been desensitized to these phrases or aren't sure what to do about hiring and placing people in roles more effectively. Often, I get the sense this is coming across as “blah, blah, blah, blah.”

Recently I started asking four questions and one follow-up question from my clients, to gauge where the CEO or business leader is in regard to these over-used proverbs. The questions are:

- 1) *Do your employees truly understand where you are going?*
 - 2) *Do your employees truly understand their role in where you are going?*
 - 3) *Do your employees truly understand the company's core values?*
 - 4) *Do you do work other employees should be doing?*
- The one follow-up question is: “What would they say?”

As the “bus driver” of your organization or team, these three questions define your major role as leader: where are we going, what are the roles and expectations of my team members, and how should we act/ behave (core values).

The first three questions form the criteria for “right people on the bus and in the right seats” and often business leaders shake their heads up and down vigorously until they get the follow-up of “what would they say” and then they are often not as emphatic. As the “bus driver” of your organization or team, these three questions define your major role as leader: where are we going, what are the roles and expectations of

my team members, and how should we act/ behave (core values). These three questions along with assessment tools should frame the litmus test for who gets on the bus and also who stays on the bus.

The fourth question is always interesting as we all do work that should be delegated, better accomplished elsewhere, or compensate in weaker areas in our organization. As we discuss the responses to the question and follow-up of “what would they say” most leaders understand they often are forced to do some of the work for weaker members of the team, either because they do not fully trust the outcome or simply know it does not meet the standards of the company.

Occasionally I get an emphatic “no” from leaders on question four, but with a bit of probing around how much time they spend with each direct report and how they spend the time will uncover the same issues of spending time doing the work others should be doing.

If we are spending time doing the work of others, compensating for poor quality, or continually “looking over the shoulder” of weaker employees we are effectively stepping out of the driver's seat.

As leaders, if we are spending time doing the work of others, compensating for poor quality, or continually “looking over the shoulder” of weaker employees we are effectively stepping out of the driver's seat and walking to the back of the bus to do work we shouldn't be doing, only leaving one really important question:

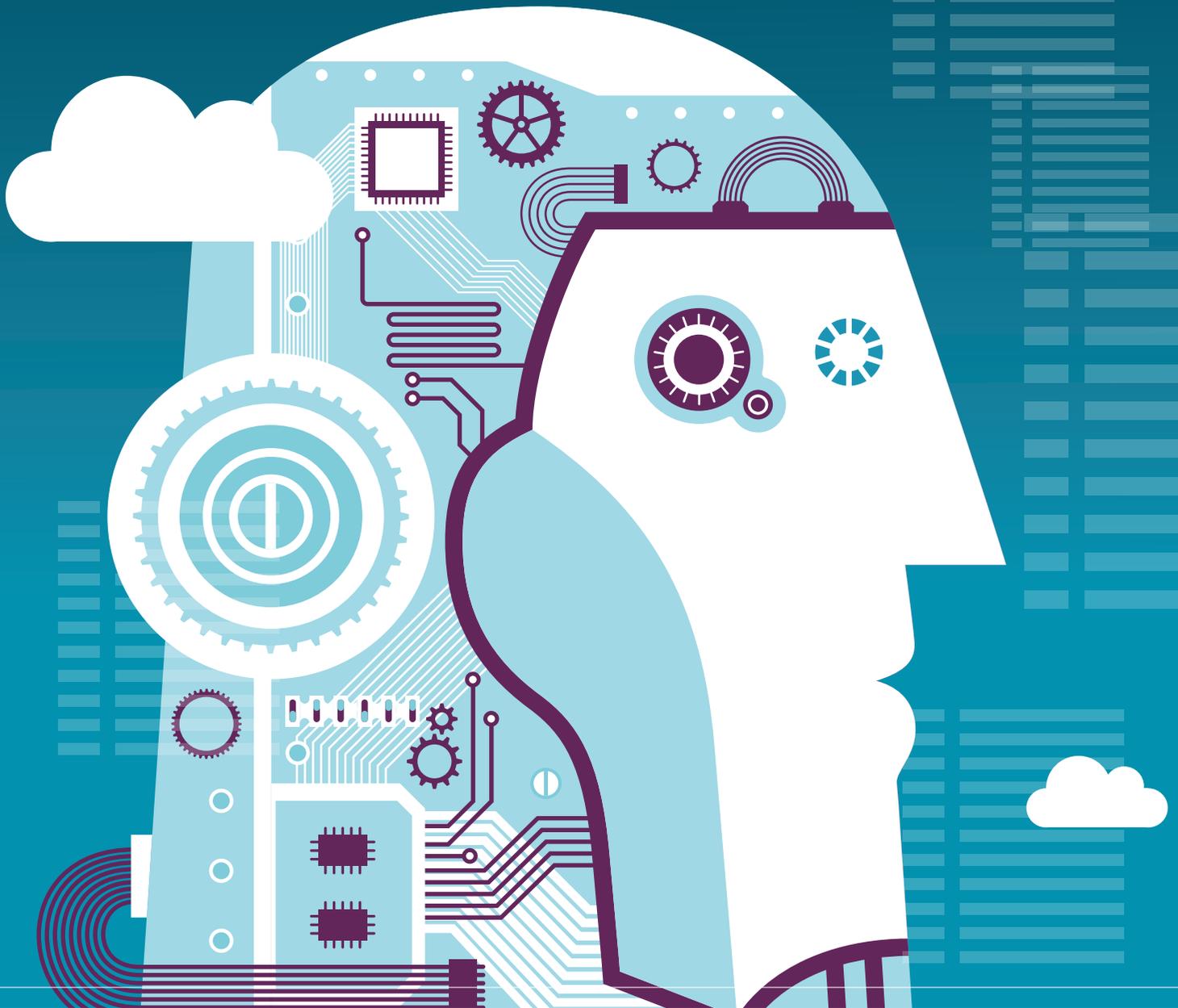
“Then, who's driving the bus?”



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(Almost)

TURNED MYSELF INTO A MACHINE



I am a big list guy...

Actually, I used to be a big list guy. I used to sit down every night and wrote out my list for the next day. Every month I did the same for the next month, and I had quarterly and annual lists too. I even had 5, 10 and 20 year lists. I nearly turned myself into a to do list completion machine...

In the past year or so, however, I have started to gradually rely less on my lists. The lists have gotten shorter: fewer things seem to deserve a place on the list, and when I realize that some items will never make it to the top, I just drop them.

*I had quarterly and annual lists too.
I even had 5, 10 and 20 year lists.
I nearly turned myself into a to do list
completion machine...*

Then a couple of months ago I heard CoachVille CEO, Dave Buck talk about lists being a relic of the “industrial age”... I didn't get what he was talking about initially, but I am starting to see the light.

So is making lists a bad thing?

No way. I think lists are a great invention. They help us break down big goals into action plans and create the focus required to power through the steps that get us there.

So, what is wrong with lists then?

Lists have to be used the right way. They are good to organize our thinking and to help us remember important chores. They are a depository of tasks, like a toolbox that we can pull out of the cupboard when the bathroom door screws need tightening.

The trouble with lists is that they are not inspiring. To achieve big tasks we need enthusiasm more than we need lists. Inspiration is unorganized, chaotic and messy. To leave the gravitational force of inertia, we need the fusion power of inspiration.

The trouble with lists is that they are not inspiring. To achieve big tasks we need enthusiasm more than we need lists. Inspiration is unorganized, chaotic and messy. To leave the gravitational force of inertia, we need the fusion power of inspiration. We must be willing to befriend messy, the opposite of the list.

Ideally, we should be friends with both the list and the anti-list. It's no good embracing the chaos, without Ariadne's string that will get us out of it. We need the list to consolidate every now and then, but when the inspiration strikes, we ought to embrace chaotic creation.

It is ok to de-prioritize everything else when we are working on something big that calls for all our attention and energy. Few things are as urgent as they seem. If we can go for a week without drink and a month without food, than surely our emails can wait a few days, and our bills can be taken care of next week.

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If we are generally reliable and can be depended on, our friends will understand. Especially if we end up creating something BIG and help others do better and have more. The world will forgive anything to the rainmaker, the leader and the artist.

Winston Churchill focused on articulating his strengths of self confidence, vision and passionate beliefs and got away with a host of weaknesses, including military blunders (Gallipoli), poor judgment (siding with Edward VIII during the Abdication Crisis), political missteps (winning the war but losing the election), while he was also frequently judgmental, insensitive, drank heavily and ignored his family.

The world will forgive anything to the rainmaker, the leader and the artist.

Lists are useful but we need the judgment to realize when to throw them out. Use lists to organize your life, but don't let them enslave you.

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Steve Preda invites you to a Peer Group Meeting to hear from Vistage speaker Dan Barnett on "Make or Break Execution – The Core of Success."

Date:
February 23rd, 2016
7:30–11:30 am

Join Vistage Chair Steve Preda and Vistage senior executive members at our next group meeting where you will hear a Vistage-quality speaker, and experience first hand how a senior executives peer group can help you become a better leader and make better decisions.

Location:
University of Richmond area.
Confirmed participants will be notified of the exact location.

- 7:30 am **Networking and Continental Breakfast**
- 7:50 am **Welcome and Introductions**
- 8:00 am **Dan Barnett:**
"Make or Break Execution – The Core of Success"
- 11:00 am **Group Discussion**
- 11:30 am **Wrap Up**

Invitation Only
Seating is limited for this event.
RSVP to: steve.preda@vistagechair.com

Founded in 1957, Vistage assembles and facilitates private advisory boards for CEOs, senior executives and business owners. More than 20,000 Vistage members participate in monthly, Chair-led private advisory board meetings.

VISTAGE
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executives and business owners.



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