

PART
I

WORK/LIFE
ALIGNMENT

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What Is Most Important to You?

Occasionally I am asked, “From a coach’s perspective, what is the most important practice that executives neglect to make time for?” I always answer, “reflection.” Other coaches and management consultants who are asked the same question often give a similar response. In this chapter, I address the importance of reflecting on your core values, commitments, current priorities, and long-term goals, in order to achieve a proper work/life balance.

The Importance of Reflection

While there are many methods to prepare you for thoughtful reflection, I have found the series of exercises I present here to be most effective in helping you to evaluate your core values, commitments, current priorities, and long-term goals. I want to point out from the get-go that it is very important to focus on each of these areas individually while never losing sight of the big picture—that is, how they affect one another.

These exercises will become the foundation of your Executive Stamina system and will help you by answering three crucial questions:

1. *What is already on your plate?* To avoid passing the point of diminishing returns, first you need to have a realistic idea of what you are already committed to in your life. By understanding the current demands on

your time and estimating accurately the effort that certain activities require, you will be able to make better decisions about what to say yes or no to. Only when you fully understand your current situation can you decide wisely whether to take on additional responsibilities or change your life in a significant way, such as by:

- Becoming the president of the Parent Teacher's Association at your child's school
- Remodeling your house
- Accepting a new job or position that will require more travel
- Caring for an aging parent
- Adding head count to your organization
- Putting your daughter on the Select soccer traveling team
- Studying for an MBA
- Starting your own business

In none of these cases is there one "right" decision; the objective is to become better at making the decision that is right for you at a given point in time.

2. *What is precious to you?* The reflective exercises will highlight for you what matters most to you: the values, priorities, goals, and relationships that are the most meaningful and the most important to maintain. These activities will help you answer questions such as, "What is the best use of my time?" In addition, by ensuring that what is most important stays at the top of your list, you will be taking an important step to countering the Law of Gradual Change. You will be able to view future commitments and revisit current ones with a keener eye toward their impact on these vital areas.
3. *Are you living your stated priorities?* This exercise puts your stated values, priorities, goals, and so on to an acid test. Match your actual schedule—how you *really* spend your time—against your avowed business, career, and personal priorities. This, for most of us, is a very difficult thing to do because, often, there are at least some key areas of life where we are not spending our time and energy on that which we state is most important.

As you complete the reflective exercises, remember that each of us is in a unique circumstance, due to a combination of a number of factors. There are many permutations of specific values, commitments, relationships, and long-term goals. In addition, our lives are fluid, dynamic, and changing (sometimes daily) due to circumstances or simply phases that shift our priorities.

For example, in my career, I've worked with people who felt that being in a romantic relationship was not an important priority for them. They preferred to dedicate themselves to their careers or to public service, and as a result attained a significant amount of reward and recognition and so were comfortable with their decision. I've also coached parents who felt they were doing the right thing by making their careers a lower priority for a period of time while their children were young or had special needs. Another client, an executive from India, made a commitment to stay in the same city as his widowed mother, and so turned down a promotion that would have taken him to the United States. Each of these individuals was clear about what mattered, and so were able to establish a personal order of importance.

Derivation of Core Values

Most of us derive our core values from our family, cultures, and society, coupled with significant experiences and other people who played an part in our development.

In terms of family, we tend to model ourselves after someone we admire; or we simply absorbed, hence mimic, the values we saw demonstrated on a regular basis. Someone growing up in a blue-collar or union household, for example, might retain strong values about how front-line employees are treated, even after he rises to senior management. Another person who heard her parents say very negative things about people who "blow their own horns" may come to regard modesty as a very important part of character.

Needless to say, our early familial experiences often influence our values later in life. For example, individuals whose parents were absent a lot, or didn't attend school or sporting events, may decide that, when they become

parents, they will be more active in supporting their children in their activities.

Cultural norms and values also have a significant influence on what we feel is important. Whether we value individualistic, bootstrap-type behavior or cooperative, team-based behavior probably has a lot to do with how and where we grew up. Many other values, such as patriotism, religion, family, entrepreneurship, education, and respect for elders, are also culturally determined.

The Reflection Exercises

My suggestion to you in approaching the upcoming exercises is to reflect on key experiences of people you've met or read about who have inspired you. If, say, a religious or spiritual person has inspired you, his or her values may rise to the top of your list. Also consider significant experiences in your own life. If you've been the victim of discrimination or been exposed to a group of people who were treated unfairly, you may have developed a heightened sensitivity to fairness and justice.

As you complete the values exercises, it's important to keep in mind that your values can shift. I don't mean that in the way Groucho Marx did when he said, "Those are my principles. If you don't like them, there are others I can show you." I'm referring to the fact that the significance we attribute to our values can become heightened due to events in our lives or society in general. For example, let's say that the Smokey the Bear public service announcement "Give a hoot, don't pollute" you saw as a child gave you an early awareness about the environment. As an adult, reading about global warming has made you gravely concerned about the impact of climate change, leading you to donate money to certain organizations, to volunteer, and/or to alter your lifestyle. Similarly, a person who regards integrity as a core value may become even more conscious of its importance in the wake of learning about corporate scandals. In the face of conflicts of interest, this person would be reminded of the crucial role that integrity plays in his or her own role at work.

Values Exercise 1: The Pleasant Path

In this first exercise, please take time to reflect on your core values. Don't concern yourself with how many you list or about the exact words you use; just be sure the meaning is clear to you. To get started it is often useful to think about messages you received from your family in your formative years:

- What values did your parents encourage or deem important?
- Think about the society (or societies) you grew up in. What were the commonly held values? Our religious values can often mirror family and society, so it is definitely worthwhile to think of the key values emphasized in your denomination.
- What grabs your attention? Where do you direct your energy and emotions? These are useful guides to what matters to you. Think of movies, books, or media stories.
- Who are the people that inspire you?
- What makes you angry?

These are all clues to your deeper values.

My Core Values

Values Exercise 2: The Unpleasant Path

A less pleasant but equally effective way of determining your true values is to focus on negative emotions: regret, remorse, guilt, and loss of

self-respect. Though these feelings are the results of some of our worst experiences, they can be important to us in a couple of ways. One is that they tell us we have a conscience and a code of behavior we want to follow. Recalling these feelings, and memories of the incidents that prompted them, can help us avoid certain behaviors or motivate us to improve. Think about it—would you want to have a business partner, romantic partner, or friend who had no capacity for healthy remorse? It is hard enough to change habits or correct behavior when we are motivated. Without remorse, there is little or no motivation to correct the mistakes, intentional or unintentional, we all inevitably make.

The second benefit negative feelings can deliver to us is in the form of greater awareness of what is important to us. These uncomfortable feelings are valid indicators of which behavior we hold in high regard. When we are disappointed in ourselves or feel we have come up short on our own standards, it is a sharp reminder of the path we *do* want to follow.

In later chapters, my goal is to give you methods for living in alignment with your values, as well as for minimizing feelings of regret or remorse. Employing these methods:

- Leads to peace of mind, self-respect, and a congruent self-image, because your “talk” will match your “walk.”
- Prevents negative emotions from hurting your career, by draining energy, chewing up time, and depleting our confidence.
- Ensures that others respect you because you will be acting in accordance with the values you espouse.

Although the ultimate goal is to reduce these negative experiences in your life, I want you to reflect on them now, in order to gain additional insights into your core values.

- Think of times when you experienced regret, guilt, or remorse.
- What do those experiences indicate about your core values?

Core Values

Making Commitments

Next I want you to take a broad, comprehensive view of your current commitments. While our commitments are often closely related to our values, it is important to concentrate on these separately, as well. The goal here is to list everything that you (or in some cases your family) are already committed to.

In our business lives we have general commitments based on our roles and responsibilities within our organizations. In addition, we may have committed ourselves to other activities, such as being a mentor, advising a cross-functional team, writing an article or giving a speech for a trade organization, serving on an outside board, or even playing first base on the company softball team. In our personal lives, there may be essential relational commitments to spouses, children, siblings, parents, and friends. In conjunction, the possibilities for commitment are almost endless—volunteering at schools, religious organizations, political parties, nonprofit organizations, and so on. We may also have committed ourselves to making improvements to our house or garden or to ourselves (learning a language, engaging in spiritual practices, etc.).

In my experience, people rarely take stock of all they are already committed to, making this is an important and sobering exercise for many. In completing this exercise, I want you to become aware of three key tendencies that can often undermine your best intentions.

- *Underestimating the actual number of people and activities you are already committed to. Write them down and see if I'm not right about this.*

- *Underestimating the time that each commitment requires.* Don't get me wrong: I'm not saying that mentoring a business colleague, being a Big Brother or Big Sister, leading the United Way campaign, joining the softball team, or remodeling your house are not worthwhile activities. What I am saying is that when people say yes to things, they usually miscalculate the time commitment they just made. Consider the softball team: Did you factor in the practices, sharing pizza after games, and—if you should be so lucky—the playoff season? Now add this miscalculation to the one about how many commitments you have and you may see yourself rapidly approaching the point of diminishing returns. At this point you may start to feel that you are not doing justice to many, or any, of your commitments.
- *Making inappropriate commitments.* I want to be clear about my use of the word “inappropriate” here. While many of the commitments you have made are admirable or worthwhile, and even enjoyable, making another one is inappropriate if it does not make sense given your current workload, existing commitments, and the impact it will have on your life.

Trust me, I have observed these three tendencies often in myself and many others, which is why I am asking you to take this first, very important step: identify your current commitments, using the commitments worksheet supplied here.

COMMITMENTS WORKSHEET

Commitment	Time Required
Business	_____
Key Relationships	_____
Community (educational, nonprofit, religious, political, sports)	_____
Self-Improvement	_____

Reflect on the key areas of your life where you are most likely to have made time commitments. Write down all the commitments that you have made or feel that you are responsible for (e.g., to care for a parent or a

sibling with medical problems). Provide a rough estimate of the time required for each commitment; don't forget to include travel time, thought time, and so on.

At the end of this activity, take some time to reflect on your list. Did you find any surprises or gain any key insights from looking at what is already on your plate?

Setting Priorities

In the Introduction, I mentioned that a key success factor for executives is the ability to correctly prioritize and, when indicated, be able to reprioritize, quickly, if necessary. In order to do this, you must be able to focus on the biggest challenges to, or biggest payoffs from, your career and/or organization.

Although it sounds straightforward and logical, several skills are required to prioritize well. Thus, the priorities exercise in this exercise is designed to first heighten your awareness about what is currently very important to you.

NOTE

In Chapter 3, you will learn about the Shifts and Drifts tracking system, which can help you reprioritize more effectively. In Chapter 5 you will learn how to optimize your time by working on the highest payoff activities. The Laws of Diminishing Returns and Gradual Change have at some point negatively impacted all executives, including myself. Pushing past the point of diminishing returns has undermined their own efforts, and/or they have gradually drifted away from core values and commitments by failing to focus appropriately on top priorities and long-term goals. The most effective way I've found to help them, and myself, is to start with some clarifying exercises that bring these areas to light. My purpose is not to provide answers or solutions; rather, it is to help you get a clear, accurate view of your current situation. I'll provide the appropriate technique to counteract these laws in later chapters.

Commitments versus Current Priorities

Just as there is a strong correlation between our values and our commitments, there is a link between the commitments and current priorities we choose to make.

For the purpose of this activity, I want you consider commitments as longer term. For example, you may be committed to your business role and responsibilities, key relationships (spouse, parent, child), and community or religious organizations. Your current priorities flow from your commitments and values but they are more immediate and urgent. So, though your general responsibility may be as your company's CEO, based on your assessment of the challenges and opportunities facing your organization, your current priorities could be:

- Analyzing current changes and trends in your industry
- Making some key hires
- Setting up “top to top” meetings with your key customers
- Accelerating innovation in your organization

Two key words from the previous paragraph are *challenges* and *opportunities*. It is useful to remember that your current priorities are fluid, and the demands are often variable. If difficulties arise in your business or personal life, it is appropriate that your priorities shift to respond to those challenges. Examples could range from your competitors hiring away some of your top talent to discovering that your child has a learning disability or emotional problems to learning you or someone close to you is facing a serious medical problem.

Current priorities should also shift to take advantage of an open window of opportunity. In business, this could include pursuing a crucial joint venture or acquisition, accelerating development of a new technology, or taking the opportunity to work on a project that will have life-long meaning to you and others. In your personal life, it might be taking a much-needed getaway with a romantic partner, sharing a meaningful experience with a child, or taking on a project that will have a major impact on a cause to which you are devoted.

While thinking about your current commitments and the particular challenges and opportunities in each of these areas, use the worksheet provided here to determine your current priorities.

CURRENT PRIORITIES WORKSHEET

Business Role

Key Relationships

Community

Self-Improvement

Long-Term Goals

Long-Term Goals

Filling out this worksheet will give you a sharper sense of your current key priorities. This is important since, obviously, your time and energy and the number of things you can focus at any one time are finite. This means that you will designate certain activities as low priority and relegate them to the “nice to do” category. If this is a conscious choice based on an accurate assessment of what really matters to you and your time constraints, this is probably a wise decision. Assigning some things a low priority is smart and necessary. Unfortunately, many of us have a tendency to, unwittingly, put very important activities on the “back burner,” activities that would actually help us achieve our long-term goals.

If you have read books or taken classes in time management, you are probably familiar with this phenomenon. The concept is referred to as “important versus urgent” or sometimes as the “tyranny of the urgent.” Basically, it is a useful reminder that long-term goals, goals that we have decided are meaningful to us, often do not seem urgent unless there is a crisis. Because other things in our life may have greater immediacy and, therefore, draw our attention, it is possible, sometimes likely, to have long-term goals but not be doing much to advance them. Remember, no bell will ring to remind you that you are neglecting this stated goal. In fact, as I explore in more depth in

the discussion on overcoming procrastination, some goals look so large or overwhelming that we avoid getting started. The cost of neglecting these goals is to our self-interests or even self-image. Here are some examples of common long-term goals that are too often left unattended:

- *Health:* Ideally, everyone has a long-term goal to maintain his or her health. As many people have wisely remarked, it is our only true wealth—all the things we want to achieve are based on it, in fact. Sadly, for too many of us, we state maintaining our health as a goal but then act as if we take it for granted. In Part II, we will look at the behaviors such as exercise, nutrition, medical check-ups, and so on that can increase your chances of achieving this goal.
- *Financial goals:* Most of us have some goals in this area, typically expressed in terms such as financial independence, secure retirement, college tuition planning, or a cruder variation, accumulating “take this job and shove it” resources. Many people are diligent in working toward these goals; just as many others, however, may neglect the record-keeping, investment analysis, and advice or systematic saving necessary to achieve them.
- *Spiritual/religious goals:* I have met many who state that their goals in this area are more important than any other they have. Of course, each individual defines this aspect of life differently. For some, the emphasis is on personal faith and piety; for others, the spiritual path must also include service to others and society. Some want to take positions of responsibility in their religious organization. This important area for individuals and families is still vulnerable to the Law of Gradual Change, and we may drift from our practices without realizing it until a spiritual crisis develops.
- *Business/career goals:* This category can include specific long-term goals for your organization, such as delivering world-class customer service or becoming the employer of choice in your industry. It can also include personal career goals you have, such as being promoted to general manager or starting your own business. In future chapters,

we will focus on what you are doing this week or this month to advance these goals.

- *Community/society*: If your values lead you to want to “make a difference” or “give something back to society,” you may have a wide variety of goals in this category. Some people may want to get in a position to change things by running for political office. Others may want to do hands-on work like improving sanitation and housing in Mozambique, or help a nonprofit organization that is doing this type of work closer to home.
- *Self-improvement and personal goals*: In addition to all these other areas, it is useful to think about our individual goals. Some might be shared by a majority of people, such as having a long-term romantic relationship or being a parent, but others may be specific to you. Perhaps you’ve always wanted to write a novel or book of poetry, paint, learn to dance, or learn a new language. Maybe you’ve always dreamed of traveling, or walking the Appalachian Trail. Sometimes these goals fall more in the “nice to do” category, but there are some that, if we get to a certain age and realize that we haven’t moved toward them, will cause strong regret.

As long as we’re talking about goals, let me say that mine here, in this discussion, is to trigger thoughts in you that will help you determine what your long-term goals are. If you need additional help, try these two techniques to stimulate your reflection.

- *The Tombstone effect*: Or “What would I want people to say at my funeral?” Think about the end of your life. What would you want to have achieved or emulated?
- *Future perfect*: For those of you who are uncomfortable thinking about your own death, or just have a more optimistic nature, consider this exercise: Imagine your future 5, 10, and 20 years from now. Everything has gone perfectly in your life. What does your life look like?

Summary

I conclude this first chapter by asking you to list your long-term goals.

Long-Term Goals

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