

Identify with Contribution Not Task

*It's Not Where You Start,
but Where You Finish*

There are studies in the psychological literature which suggest that people who identify themselves with their titles and job descriptions are devastated when that formalized identify is removed. Hence, a layoff removes more than that person's paycheck. It removes his or her persona.

However, when one identifies one's self with an ultimate contribution, that continuity of identity transcends jobs, environments, and cultures.¹ *This is a totally mental state.* That is, we determine with whom and with what we identify ourselves. Every salesperson probably has a job description with "salesperson" prominently printed and expected procedures for sales calls explained at length. But the best of them know that their job is to bring in new business, not to make sales calls.

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1. This is the point behind the ancient parable of the three stonemasons, one of whom was shaping stones, another of whom was constructing a wall, but the third of whom was building a cathedral.

Advice from the Readers of *Balancing Act*²

Dr. Dean Ornish says that the greatest cause of disease is stress and conflict in the workplace. Given that preventing, resolving, and teaching others how to resolve conflict is my life work, I have an unending amount of work that could keep me busy forever. Personal mission has always been very important to me. It is what drives and governs the strategic choices I make about projects and assignments I get involved with. One of the things I have learned is that no matter how much energy and commitment I have, my ability to be a contributor, to making people, organizations, and culture healthier and more effective, will be greatly diminished if I neglect personal balance.

One of my early teachers brought this truth into clear relief when he provided a dozen long-forgotten examples of modern and historical figures with a huge potential for contribution who had burned out at an early age because of their inability to sustain a level of personal balance. People in the entertainment field immediately come to mind who failed to realize their potential in terms of the joy they brought to others—Janis Joplin, John Belushi, Freddie Prinz.

Twice in my life I have run into the brick wall of burnout. When you don't "Stop" when you are out of balance, your body forces you down. My suggestion: When you find yourself drifting over the edge, intervene as a matter of choice before forces more powerful than you force you down.

Stewart Levine, author, *Getting to Resolution* and *The Book of Agreement*,
www.ResolutionWorks.org

There are people in Mensa, the high IQ organization, who continually whine that they're not appreciated and are even discriminated against in the workplace because of their "gifts." The truth, of course, is that they are basically unsuccessful and unfulfilled people who have adopted Mensa and its high-intellect connotation (although not validation) as their identity. Take the Mensa membership away and you have a person seeking an identity.

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2. These pieces of advice were submitted by readers of *Balancing Act: Blending Life, Work, and Relationships*, my free electronic newsletter. To subscribe, send an email to: join-balancingact@summitconsulting.com or visit my website and click on the Balancing Act icon (www.summitconsulting.com).

CASE STUDY

The manager of a major advertising office for *The Los Angeles Times* once complained to me that his major problem was with a long-term employee who rarely stirred from his desk to make field calls. He set a bad example, apparently, and his tenure made him virtually untouchable.

"What is his revenue production?" I asked.

"About \$75,000 per month," said the manager.

"And what's average?"

"Less than \$50,000."

"So what's your point!" I shouted. "He's outperforming everyone by at least 50 percent!"

"Yes, but it's important to get people out of the office. You can't be successful selling from the office."

Instead of finding out what the guy with his feet on his desk was doing right (constant phone calls and personalized "tweaking" of ad content and location), the manager had installed his own set of "rules."

Don't laugh—I've seen consulting firms measure the number of proposals submitted to prospects rather than the actual business that resulted!

In the workplace, our balance and equilibrium are largely a function of identifying ourselves with contributions (finishing points) and not tasks (starting points). No one ever gave a medal to a runner because of excellent form at the starting line.

THE INPUT/OUTPUT RULE

The input/output rule holds that outputs trump inputs. That is, the result is far more important than the activity.

People tell me all the time that their work is like a fungus, slowly growing all around them, climbing the walls and insinuating itself through their lives.

They can't seem to get a grasp on retarding the steadily encroaching obligations (somewhat reminiscent of Steve McQueen and friends in the classic 1950s horror movie, *The Blob*).

Is the only answer to hold out until we're completely engulfed and absorbed by the morass?

When Lincoln was asked by women from temperance organizations to fire Ulysses S. Grant because he drank, Lincoln said, "I can't fire him. The man fights. I ought to send a barrel of his favorite whiskey to all my other generals!" It's the output that counts.

The problem is that we take our eye off the finish line and, instead of getting there as quickly as possible within the rules of the game, we start to pay attention to how we're wearing our uniforms, what the crowd is yelling, whether the field is thoroughly groomed, and how the other competitors look. Track and field coaches uniformly admonish runners to never look back, because it slows you down, distracts you, causes stress, and tells the competition you're worried.

"Even if you're on the right track, you'll get run over if you just sit there." —Will Rogers

On which side of the "fence" below do you spend most of your time?

Professional Actions

- Write reports
- Conduct "events" (such as focus groups)
- Research and analyze
- Commute and travel
- Upgrade software/improve office
- Deliver advice
- Implement new procedures
- Coach, counsel, and monitor behavior
- Influence and persuade clients
- Acquire new business

Personal Actions

- Repair things around the house
- Read or watch things out of routine
- Debate how to do something
- Feel obligated to do things
- Work at home and/or after hours
- Recreate
- Experiment with new interests
- Discuss what to do
- Feel freedom to do things
- Play during the week

We fill our lives with accreted material which, like stalactites, forms a mass which hangs in our way and eventually impedes all progress. We must stop the dripping mess.

If the greater percentage of your time is on the left, you are being overwhelmed by tasks and “jobs,” many of which can be eliminated. Some aspects of the left column must be done, of course, to achieve what’s in the right column. But the left is the means to the ends on the right, so *at least two-thirds of your time ought to be spent on the right side of the “fence.”*

If you want to get rid of unnecessary tasks and inputs in your work and life, try using this template ruthlessly and candidly. If the situation fits any of the criteria (and certainly if it fits more than two or three times), eliminate it.

Criteria to Eliminate Tasks and Re-Deploy Your Time

1. If you stop doing this for two weeks, will anyone care? *Example:* Don’t respond to certain email requests. Do they continue or disappear? Were you enabling that behavior by responding to it?
2. Can you get the same result from other tasks that *you already perform*? *Example:* If you keep addresses and contacts in a contact management system, in your email address book, and in your personal digital assistant, can they be combined or can you rely on just one of them?
3. Is the reason you began doing this still valid and as important today? *Example:* Are you sending out marketing materials that are out-of-date, no longer reflect your current thrust, and/or have not produced results for quite some time?

4. Are there people not doing this who get the same or better results than you? *Example:* Do you network with other professionals who never follow up on leads after the first call and who actually have a higher rate of new business acquisition than you do?
5. Did someone else ask you to do this for his or her purposes, not yours? *Example:* Are you sharing things, copying things, or otherwise conveying information for which there is no quid pro quo and you are merely extending a courtesy far beyond the original intent?
6. Does this take up a disproportionate amount of time compared to the result? *Example:* If you're using 25 percent of your computer capability to effectively handle 98 percent of your needs, does it really make sense to take weeks to master another 25 percent for the final 2 percent of your needs?
7. Is there someone else who would love to do this? *Example:* If you have staff, can you delegate? If you don't have staff, can you find hourly help, a college intern, or your children? Do you really have to address envelopes yourself?
8. Can you get better at it and reduce the time required? *Example:* By learning to "touch type" you can save at least an hour a day, five hours a week, twenty hours a month, nearly two weeks every quarter. Is that worth a couple of days of lessons?
9. Can you reduce this to an "on demand" instead of a "mandatory" status? *Example:* Never mention a written report to a client. Never offer one. If the client requests one, say that you usually do it interactively with a few discussion points. Only if the client absolutely requires a written, formal report should you consider doing one (I'll still resist).
10. Can you live with the consequences of not doing it? *Example:* By not following up on low-level leads, you might miss one piece of business every two years, but save yourself forty hours in the process. For me, that's a no-brainer.

Everyone has equal time, about twenty-four hours a day. When you say "I don't have the time," you really mean that you choose not to spend it in that fashion. That's rather damning when you say it about a kid's soccer game or a spouse's social event.

WE BUILD OUR HOUSES; THEY SHOULDN'T BUILD US

Winston Churchill once observed that we build our houses, and then they build us. He was referring to Parliament, but the point seems to apply universally.

We construct “nests” and comfortable homes at work to which we flock and within which we seek succor. We chant that life is about change, yet we seek to fend off the advance of change at every opportunity.

Advice from the Readers of *Balancing Act*

On January 1, 2001, my wife, Barb, who was four months pregnant, my one-year-old daughter, Sarah, and I drove home from a friend's house. Barb and I barely spoke to each other, and when we did, it was in short, angry bursts. Tension filled the air, and big tears rolled down Barb's face.

On January 1, 2002, Barb, our two children, and I drove home from her parents' house. The two kids were sound asleep. Barb and I laughed and spoke to one another in a calm and loving manner. We enjoyed each other's company and shared stories about the past year in a very enjoyable manner.

What made the difference?

In 2000, I worked all day every day. When I was in St. Louis, I worked until 5 p.m., had dinner with Barb and Sarah, and then went back to my office to work some more. The rest of the time I traveled with business. In case you're wondering, all work and no play makes for a very dull boy and a very bad marriage.

In 2001, I almost never worked in the evening. Many times I went to the playground with Sarah. The four of us (Ben joined us on May 30th, 2001) had picnics in the backyard during the week, went on three vacations, and generally enjoyed our evenings together. As you might recall, 2001 was filled with anxiety, a poor economy, and terrorist attacks. Yet it was the best year ever for my family and me. The increased balance also enhanced my self-esteem, dignity, and the quality of my life and work.

Dan Coughlin, President, The Coughlin Company, Inc.,
a firm specializing in enhancing the effectiveness
of top performing executives, groups, and organizations

Take a look at your work and you just may find that your existence as an entrepreneur is no less bureaucratic and habit-bound than is that of your corporate friends and clients. We allow our work structure to become calcified and rigid because we tend to seek discipline and methodical consistency—not bad traits by any means—but we confuse rote-like repetition with consistent results.

In other words, we once again mistake ends and means.

Here are some examples of—and suggested remedies for—those inflexible practices which add to the arthritis of our business lives, eventually creating a near-rigor mortis in our professional conduct. Too many consultants who began as free-thinking, experimental, and risk-taking entrepreneurs have evolved into people with blocked business arteries and systems sclerosis.

The Business Plan

The worst thing about a plan is that you hit it. I've had clients who bragged about instilling a corporate-wide belief in a 5 percent growth in the northeast and then rejoiced when that figure was hit. The problem, of course, is that the growth should have been 13 percent and could have been, except that everyone was fixated on hitting 5 percent and then called it quits in order to celebrate.

The only reason for a business plan is to have a cogent, well-supported document for lenders should you wish to borrow money. There are two problems with this, however:

1. Early in your career, no one will lend you money no matter what your business plan says, unless you have collateral in the form of assets, equity, receivables, and so on.
2. Later in your career (as you are now, presumably, reading this series), when you don't need loans, they come at you like hail on a stormy day, pelting you with offers, checks, and credit lines.

Business plans are, by definition, self-limiting and unnecessary to successfully run a solo practice or even a small to medium-sized firm.³ Business plans are convenient tasks that enable people to think they're actually accomplishing something when they're better off spending that time trying to market and

3. Note that I'm not saying you don't need a strategy, just that you don't need a business plan.

bring in new business. Don't do them. They waste time and, worse, establish illusionary structures within which to operate, except they really won't protect you from the elements or constitute any tangible asset at all.

What every entrepreneur does need is a marketing strategy; that strategy can be based on something as elemental as three components: What market need are you trying to fill? What competency do you have to fulfill that need? and Are you passionate about doing so? Any more sophisticated techniques—such as branding or alliances—can only arise *after* those three determinations.

An Office and/or Staff

Since most of us are refugees from the corporate world, I have no idea why anyone would voluntarily want to go to an office every day, nor do I comprehend why anyone would want to manage a staff.

I've found that most people who crave offices do so because of a belief that the office validates their identity as a legitimate professional. (I know that I believed that until my wife talked me out of the idea when I launched my practice.) It's a self-esteem issue. There is a minority, I suppose, with space too cramped or interrupted at home to effectively set up an office there, but that's rare. And the problem with any external office is that it creates a regimen, a responsibility, and a reason for performing certain habits (such as opening and closing it, paying the utilities, communing with business neighbors, and—heaven forbid—commuting).

A staff of even one creates problems with personal concerns, tax responsibilities, benefits, potential legal liabilities, theft, loss of confidentiality, poor client service, and a host of drawbacks that far outweigh the status. My rules have always been: First, do it yourself; if you can't do it yourself, contract it out by the hour; if you can't contract it out by the hour, outsource it; if you can't outsource it, do it yourself.

A friend and alliance partner of mine with a very successful practice attributed a large part of it to her full-time assistant, who arrived at my friend's home office every day and labored from nine to five. The fact that she was cheerfully incompetent and actually *caused more work than she ever completed* was lost on my friend until I encouraged her to test the waters without her trusted assistant. The test was so successful that my friend has just completed her first "anniversary" without her assistant. She is happier and wealthier than ever and has informed me that she's glad she thought of it! (This, of course, being the sign of a successful consulting engagement—the client thinking it was all really her idea!)

CASE STUDY

My wife talked me out of an office in 1985, when I had been fired and had no income, and when being an independent consultant was a dream far from any reality. "If it turns out you really need an office," she reasonably pointed out, "you can always get one later."

After fifteen years of working at home and building a seven-figure practice, I totaled up the expenses for my once-desirable office over that span, including presumed rent, insurance, utilities, equipment, furnishings, repair, secretarial presence, taxes, and so on. The sum, to my astonishment, came to \$450,000. (That's only \$2,500 per month.)

Ironically, that is almost exactly the amount that it cost me to send two children to very expensive private schools from kindergarten through undergraduate degrees. That was an eye-opener, and clearly still another shining moment for my wife.

And now, with my kids in the workforce for several years, all that tuition money is ours . . .

Offices and staffs, aside from the severe financial burden they create, also critically hinder our choices and our freedoms. Don't allow them to build your house.

Advisory Boards

I'm a big fan of advisory boards when a consultant is getting started. They provide valuable independent advice, contacts, feedback, and an instant respectability and credential. However, there comes a time when they outlive their usefulness.

Advisory groups (clients, attorneys, accountants, publicity people, other entrepreneurs, and so on) have their own agendas and, as well-meaning and objective as they may be, *can never be intimately familiar with your own passions, goals, and unique dynamics of family, friends, interests, and so on.* There comes a time when becoming an Ultimate Consultant means you've outgrown such advice.

We evolve. We can't carry all the baggage we've sometimes justifiably needed at given moments with us throughout our lives or we'll be forever bogged down. Good ideas aren't always eternal—and are seldom even long-lived if not constantly honed and altered to fit our changing conditions. Even hermit crabs continue to seek new shells to use as they grow.

This doesn't mean you've learned everything you need to learn. I'm constantly surprised at how stupid I was just two weeks ago! But it does mean that *your sources of input, feedback, and calibration must change*. I've seen too many otherwise successful consultants actually retarded in their growth and wasting their time because a once-effective board of advisors is providing input for the consultant of three years ago instead of the one actually sitting across the table.

The best boards of directors have rules with term limits. You should have at least the same. And if you insist on an advisory board, change it regularly so that the new people enter at a point contemporary with your current achievements. Better still, abandon these boards (which truly successful entrepreneurs quickly outgrow and leave behind) and obtain your feedback from people who are slightly more successful than you, from clients, from trade associations, from extended reading and travel, and from situational research.

In other words, get out of the house and onto the road.

PRISONERS OF "DELIVERABLES"

What you and I do is very important; *how* we do it is far less important. Yet talk to any consultant (or read the consultant's marketing material or visit his or her website) and you'll find an exegesis about *how*.

We are enraptured of our deliverables, and that awe ruins life balance. A six-step sales process, a model focus group, or a psychometrically dazzling survey is worthless if the client results aren't met. Worse, the accent on deliverables consumes vast amounts of time that could otherwise be spent at the beach or with the dogs.

Advice from the Readers of *Balancing Act*

Two thirty in the morning, and I was still in my office. I couldn't believe it. I had been working since 7:30 a.m. the day before. I looked up at the clock and my throat locked.

I felt like a vise was wrapping tighter around my neck. *This damn business*, I heard myself saying; but it wasn't the business, it was me. I had vested every ounce of energy and every spare minute of my life into making my direct mail business prosper.

Fifteen years had passed, and yes, it was the roller coaster ride of my life. I loved every minute of every day, but my family was growing and my husband was beginning to stop asking if I'd be home for a late dinner.

My life was completely out of balance. Why hadn't I seen that before? I began visualizing the noose around my neck getting looser. Visualizing my throat beginning to open. Was I having a heart attack? What was happening? This business wasn't fun anymore, and it was literally sapping my life's breath away.

Adapt or sell. Take control of my life or give it up to whatever issue hit that morning when I walked in the door. After a few minutes I knew the answer—it was time. I would find a buyer and do something different that gave me the thrill I loved and also the life I deserved.

Sometimes balance is just knowing when you're teetering over the edge. Sometimes finding it requires drastic change. My head hadn't listened, but when my throat locked, I knew that my body had.

Beverly Post, Certified Business Coach,
Next Level COACHES-*Get There Faster*

Clients' behavior has exacerbated this mischief. The lower level the buyer, the more the buyer seeks deliverables as evidence of "success." I want to throttle low-level people who are unhealthily interested in the following:

- Number of days you'll be on site.
- Timing, number, and length of reports to be submitted.
- Numbers of meetings held.

- Manuals, booklets, guides, and other paraphernalia to be produced.
- Numbers and outlines of workshops, seminars, focus groups, and so forth.
- Documentation, technical studies, guides, and analyses.
- Job descriptions, performance aids, and templates.
- Forms: succession planning, hiring, exit interview, career tracking.

When a buyer starts to yammer about deliverables, explain that your “deliverables” are results, that is, the achievement of the buyer’s business objectives for that project. You’ll want to minimize the amount of “stuff” that gets in the way of the expeditious achievement of that goal.

In many cases I’ve seen consultants all too readily reduce their role to that of apprentices who have been told exactly what’s wrong, how to fix it, what tools to use, how much time to invest, and so on. They are a pair of hired hands being directed by a client who allowed the problem to emerge in the first place, who couldn’t then correct it without external help, but who feels perfectly qualified to direct that hired expertise in how to resolve the problem!

This is hubris raised to art form. But it’s hubris with assistance, since consultants often feed the process through their own lack of self-esteem.

We must educate the buyer early if we don’t want to stay onsite late, and that means dispensing with the ridiculous notion that deliverables are important. There should be no such category in your proposals. There should be no such vocabulary in your presentations. And there should be no such concessions to your buyers.

The entire concept of “deliverables” is a chasm on the road to life balance.

It’s not where you start; it’s where you finish. A deliverable is never a “finish,” but merely a way station on the road to finality. I know that you may be thinking, “But it’s impossible to achieve results without undertaking a variety of tasks and producing an assortment of deliverables along the way. They are rungs in the ladder.” Perhaps, but why use a ladder if there’s an escalator, or an elevator, or a helicopter?

Here’s the key difference: Let’s say that you’ve decided that focus groups are going to be a primary methodology to determine employee sentiment on an issue and to gain some of their ownership in a needed change. So far, so good. But here are two important differences between what I’m espousing and what most consultants actually do:

CASE STUDY

I was presenting my views on leadership development to three low-level but legitimate buyers at Con Ed, the huge New York utility. Things had been going well, I thought, until a woman asked me what my binders would look like.

"What binders?" I asked, confused.

"The binders for all your program materials," she told me, "because we're very proud of the look of our materials."

"I don't even know if there will be binders," I replied, now annoyed, "because leadership doesn't come out of binders; it comes from changed behavior on the job. You'll know it because your labor relations improve and your public image is enhanced and safety violations decline, not because everyone has a binder on his desk."

"Well, if you can't produce a decent binder, I don't see why we should hire you!"

The other two broke up the growing battle, and I didn't get the job. I don't regret that. I do regret not clobbering her with a binder, though. I would have done Con Ed a great service.

1. The number of focus groups is up to you, not the client, and the number is immaterial in terms of value (and, therefore, your fee). You may estimate that twelve groups are needed, but find that after seven you're getting repeating patterns and that your work is done, or that after twelve you're still getting such diversity that you'll need another six. It doesn't matter—you're determining need in real time based on your consulting expertise, and there is no investment difference for the client. And certainly *the client should not be determining the number of focus groups*.
2. There are no immediate deliverables attached to the focus groups. That is, there are no weekly reports, interim reports, periodic briefings, PowerPoint™ slides, or summary documents produced. The information from the groups is integrated into your project analyses and recommendations.

One of the main reasons that clients demand time-consuming deliverables is that consultants advertise, promote, and offer them. Stop doing that.

The “deliverable” here is the project outcome: An accurate sampling of employee sentiment and the involvement of employees in designing the nature of the changes needed. If you accomplish that without one deliverable, the client will love you nonetheless. If you don’t accomplish that, despite producing one hundred deliverables, the client will never ask you to return.

No buyer, in my experience, says, “Get me that guy with the great deliverables” (or, more prosaically, “Get me the woman who runs such a good focus group”). What the buyer says is, “Get that consultant who got our employees behind the change with a minimum of resistance.”

CASE STUDY

In late 2000 a long-time buyer at Hewlett-Packard asked me to undertake a project to help determine the proper client interaction for a true “solution sale.” It was a small focus, and she had a very limited budget, but really wanted my help. I’m located 3,000 miles from her.

We agreed on the results of our modest study and also that it was silly to use up the budget on travel costs in an electronic age (and with technological giant HP!). Since HP managers often reported to and collaborated with colleagues who were on other continents, why should a consulting relationship be any different?

We successfully concluded the project in ninety days and produced a model to be evaluated for a solution sales mentality and reality. During that entire period I never set foot on an HP site, and the “deliverables” were phone calls, email, hard-copy reviews, and designs. The client actually created almost all the actual documentation in HP-friendly formats.

Oh, and as a result I was engaged for a nine-month follow-up project to assist with the pilot solution sales implementation.

Deliverables usually require that you “deliver” something other than results, outcomes, and objectives. Some are essential in helping to move the project along, but I would maintain that only a small fraction of deliverables fall into that pragmatic category.

Eleven Guaranteed Techniques to Dramatically Reduce Deliverables

Hence, I suggest you carefully weigh the following before entangling your time and limiting your life choices in convoluted and lengthy deliverables:

1. Is what you’re doing really critical to project progress, or is it “make work” to show that you’re present and doing something? *Example:* You don’t have to be onsite to review documents, to make calls to your client’s customers, or to design alternative approaches.
2. Is there an easier way? *Example:* Many interviews can be done by phone instead of in person, and many surveys can be done better by electronic response rather than by hard-copy returns.
3. Is it redundant? *Example:* A sample is just that—you don’t need to involve the total population of larger operations to get accurate feedback. If you’ve provided a briefing, do you really need to back it up in writing? Must people receive a copy of everything you do in slide format?

Consultants tend to agonize over “Am I doing enough?” Try asking the converse when about to propose a project: “Am I offering too much?” If you want to increase your *fees*, fair enough, then increase your *value*. But that has nothing to do with increasing your deliverables.

4. Is it too long? *Example:* I’ve never found I needed more than thirty minutes for a one-on-one interview if I have tactical, highly directed questions and if I’m willing to move quickly. Yet many consultants take three times as long, mainly because they ask vague questions and are afraid to cut off digressions.

5. Is it an arbitrary client request and not a methodological need? *Example:* Clients will often request you do things “as long as you’ll be here anyway” or because “we’ve done this in the past.” Resist such superficial requests. There is no reason to spend time in the finance department if that area is unrelated to the project and has no one with useful information or perspective.
6. Is it merely a favored alternative of yours? *Example:* Consultants mindlessly conduct lengthy, boring, and time-destroying needs analyses because they include them in their approaches in robot-like fashion. Most of them are completely unnecessary and silly. Just because you *can* do something doesn’t mean you *should*.
7. Does Occam’s Razor apply? *Example:* More on this in a following chapter, but in most instances, the easiest explanation is also the most probable. Are you going around the block to get next door? Don’t bring in heavy equipment when you merely have to ask a few people to change a procedure.
8. Are you mistaking activity for value? *Example:* You’re better off seeing the buyer once a month and offering real value than you are appearing twice a week to perform tasks with subordinates.
9. Are you allowing yourself to be delegated to the delivery obsessed? *Example:* Many buyers will mistakenly conclude after the proposal is signed that they are done until a final report is produced, and the consultant is delegated to the implementers. It’s incumbent on us to resist this demotion. The subordinates *will* be delivery-oriented, so we can’t be exiled to that strange land.
10. Are you falling in love with your methodology? *Example:* I’ve watched consultants who let projects go to hell while they were installing their magic software, or implementing their seven-step sales process, or constructing an esoteric and complex quality assurance bureaucracy. Don’t become a slave (or be awestruck) to your own devices. Every technique is simply a means to an end, and not an end in itself.
11. Is the buyer involved? *Example:* Buyers hate “busy work,” details, implementation, and small picture stuff. That’s great, because if you establish a close partnering with the buyer, you too will have to focus on getting things accomplished quickly with a minimum of superstructure and infrastructure. It should be a lean and mean ship.

THE STRATEGIC VS. THE TACTICAL

We must take a “big picture” view of our jobs, careers, and projects. Too many consultants not only don’t see the forest, but they don’t see the trees and they don’t see the leaves. They’re busy examining the veins in the leaves. This is not a strategy for life balance.

A fundamental advantage I’ve found is to view things first and foremost *from a strategic standpoint* and not a tactical one. It’s not that tactics aren’t important, but that we tend to be *strictly* tactical. That’s why consultants seldom have cogent marketing, pricing, growth, retirement, and—yes—life balance strategies.

View your work and your life through a telescope, not a microscope. You’ll gain a true perspective of the world and your place in it, and your decisions will be far easier, more relevant, and much more successful.

Tactical blinders are an occupational hazard. We become adept at project management (the ultimate, and perhaps most boring, of the tactical pursuits). We organize and plan,⁴ follow up, budget, correct problems—we tend to be the quintessential tactical marvels.

But at what cost?

The timeless graph in Figure 1.1 shows the relationship between strategy and tactics. I would suggest that, while the ideal condition—for a client or for ourselves—is in Quadrant #1, we actually spend most of our careers if we’re not careful in Quadrant #2. Even Ultimate Consultants, highly successful, profitable, and retaining long-term repeat business, are basically reactionary and operational, not proactive and strategic.

4. Planning and strategy are, of course, two entirely different disciplines, the latter involved with goal setting and the former with implementing. The phrase “strategic planning” is a huge oxymoron. For more about these distinctions, read *Top Management Strategy: What It Is and How to Make It Work* by Ben Tregoe and John Zimmerman (Simon & Schuster, 1980) or my own *Best Laid Plans: Turning Strategy into Action Throughout Your Organization* (Las Brisas Research Press, 1994; originally *Making It Work*, HarperBusiness, 1990).

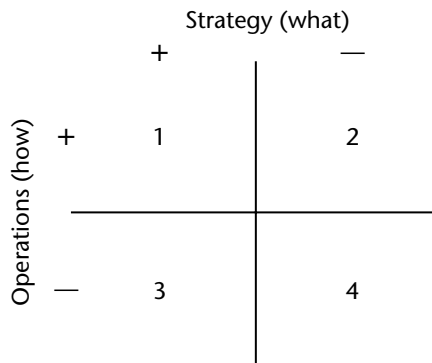


Figure 1.1. The Relationship Between Strategy and Tactics

If you don't believe me, here's a quick test. You don't have to send it in for grading, and you don't have to share it. But you do have to be honest:

Strategy Assessment

1. Do you tend to wait until the last minute or even neglect to put away retirement funds, which are deductible amounts from taxes, or do you commit these funds early in the fiscal year from initial profits?
2. Do you take vacations as time permits and add them on to business trips, or do you plan them well ahead and work your business around them?
3. Do you tend to think about new products and services when you see the competition's success with them, or do you lead the pack in innovative and original products and service offerings?
4. Are you a late adapter to technology, struggling to adjust and make it work for you, or do you integrate the newest developments into your practice and your life to ease your load?

If you're not becoming more strategic as you mature, achieving greater success, and continuing to learn, then there is something basically wrong with your philosophy. Moreover, you are not improving your life balance, but rather eroding it.

5. Are you still selling and marketing in the same fashion that you did years ago, or have you now developed more passive income, alliance partners, and non-labor-intensive alternatives to sustain your business and lifestyle?
6. Are your margins stable or even eroding from increased overhead and stagnant pricing, or have your margins increased dramatically as you've improved your value proposition and decreased costs of doing business?
7. Are you still a "well-kept secret" outside of your immediate clients and community, or have you created brands that attract new business at virtually no cost to you?
8. Are you continuing to travel at about the same rate as years ago, or are you controlling where you go and when?
9. Do you continue to accept unattractive clients and questionable projects to put bread on the table, or can you now afford to be selective, sometimes rejecting a prospect and/or firing a client?
10. Do you still struggle to find time for your family, interests, passions, and non-career pursuits, or are you able to immerse yourself in personal pleasures and private interests whenever you like?

I don't think this test requires a scoring sheet. You know where you stand. If you are reading this series—and the seventh and final book in this series, no less—then the second half of each question ought to be your honest selection. If it's not, you owe it to yourself and your loved ones to make some changes immediately.

And if you're not at the Ultimate Consultant stage, but are reading this book to prepare yourself to arrive there, then use these questions as your template to make important professional decisions along the way.

When you are faced with key decisions (and this applies to personal issues as well as professional, although I'm primarily talking about your business here), then ensure that

- You analyze what the longer-term implications are.
- You're never penny wise and pound foolish, meaning that you're willing to invest today for a return in the future.
- You maintain the perspective of what the decision means in light of your client's existence and your own existence. (Few things we ever do have endless import, and none will affect the future of Western civilization.)

Advice from the Readers of *Balancing Act*

All Things Being Equal?

A great fallacy about life balance is the idea of equal measurements. No one sleeps a fourth of the day, works a fourth, plays a fourth, or eats a fourth. Compartmentalizing life offers little reprieve. Charting the day and scheduling every minute—even rest time—often creates an even greater sense of imbalance.

Disregard equal. There's no such thing as an equally balanced life. If I could spend 80 percent of my waking time with my family, 10 percent working, and 10 percent in personal development, I would consider that balanced. Would anyone else? Doubtful, but who cares?

Do I get to balance my time like that right now? No, but I'm heading toward it! And when that time comes I may appear to be the most out-of-balance person on the planet to those who wear imbalance and workaholism as a badge.

You alone get to determine what balance means for your life. Once you discover it, pursue it with ease.

Paul Evans

- You determine what the impact will be on your goals for the next several years, and not just for today or tomorrow.
- You factor in the implications for your personal life. (I've had the good fortune to be able to turn down business over the past decade that would have compromised my ethics, my comfort, my family time, and/or my passions. That's a position few people attain, regardless of wealth, since it has more to do with philosophy and beliefs than with bank statements and income.)

Any profession is a means to an end. It is the economic fuel for your life. If you believe that your life is the fuel for your career, not only will you run out of gas, but you'll probably crash and burn. You retire from a job. You never retire from your life.

It's not where you start; it's where you finish. The runners on the outside lane of the track with the staggered start have no advantage over those on the inside starting farther back. They all have the same distance to cover.

The point, I think, is to keep your eye on the goal and not to waver. It turns out, most of the time, that your life will outlast your career.

ALAN'S ULTIMATE LESSONS

Maintain your sense of humor at all times. It creates tremendous perspective and enables you to laugh at yourself, first and foremost. Those who have the worst life balance are those who take themselves too seriously. Nothing we do affects the fate of humankind, but everything we do affects us tomorrow. I defray hostility with humor, create relationships (as an introvert) with humor, and keep my sanity with humor.

One morning before 10:30, my copier ran out of toner, my laser printer ran out of toner, my postage meter ran out of postage, my fax ran out of paper, my email crashed, and my car developed a leak in its left rear tire. I started out angry and quickly fell apart laughing at this modern version of Job's lot. I decided to take care of everything before lunch, then attend to my normal commitments, but then arrange a reward.

I resolved to take the next day off and never get out of my pajamas. I spent the next day in heedless hedonism, watching old movies and ordering food to be delivered.

My wife asked if I were ill. I told her no, I was just recovering from a bad day. She told me she wished she were I. I take that as a great compliment.

Now I'm hoping that things go so comprehensively haywire again, because I'm going to spend the day after that at a spa . . .